



# Nonprofit Guide to Email Welcome Series



## Introduction

Does this sound familiar?

After year-end giving season comes to a close and our thank you notes are sent, more often than not our donors don't hear much from us until we're ready to send another appeal.

We can do better for our supporters and our missions.

Think of what could happen if you spent more time communicating with your supporters and focused on building relationships with donors throughout the year. Would your retention rates improve? Would you get more recurring donors, volunteers, and word of mouth referrals for your cause? Before you dive headlong into year-end fundraising mode, take some time to reach out to your donors and start a conversation with them about their impact so far, and what more you can do together.

In this guide, we'll show you how to use email to build a relationship with your donors so they'll be more likely to give to your organization this year – and for years to come.

# Every Great Relationship Starts with Hello

We all know how to say hello. It's a basic skill that kicks off all of our relationships. Don't skip this important step when beginning a new relationship with a supporter.

Remember: A hello is about creating an opportunity to get to know someone. It's about asking questions and understanding another point of view. Focus on the true spirit of saying hello without jumping right to "will you donate?"



## What Makes a Great Welcome?

Branded email with your nonprofit's logo and

A hearty welcome!

A compelling photo that illustrates your nonprofit's mission and personality

Sincere appreciation for the supporter's interest in the organization

What the audience should expect from future emails

Specific contact information

Signed by a real person

Another way to connect and find out more

**A shining example of great hello from Sanctuary One.**



## Create a Great Welcome Series

### Why a welcome series is important

After a constituent signs up to receive emails from your organization, you probably send them an automated email that acknowledges their submission and thanks them for their interest in your organization.

But what comes next? To ease new constituents into a closer relationship with your organization after sign-up and to lay out a welcome mat of sorts to your cause, consider introducing your organization through an email welcome series.

### What it is

A welcome series is a sequence of two to three simple, personal email messages (a plus is if you can automate them!) that a constituent receives over the course of their first few weeks on your email list. It educates them about your organization, its programs, and ways to get involved and stay connected. If executed thoughtfully, a welcome series can help you give new constituent relationships the personal attention they need without a huge resource commitment (before asking for donations).

# Plan Your Welcome Series



## **Send a personal note from the voice of your organization.**

This could be your organization's executive director, a staff member who works in your development department, or a celebrity spokesperson.

(Quick tip:

Tread lightly with your spokesperson. Constituents want to talk to someone who relates to them on an ongoing basis, not just a talking head.) Your first email should highlight the state of your organization and educates new constituents about what your organization does and the people or community that you serve. Focus on educating your new constituents and reminding them what they signed up for. Reinforce benefits and set expectations about what your constituents will receive and how often.



## **Highlight specific ways your constituents can get involved.**

Do you have really great programs geared toward families? Are you looking for volunteers for your homeless ministry? Planning a gala dinner and recruiting committee members? In your second welcome message, emphasize educating newcomers on ways to get involved or highlight the value of being a supporter. Mentioning upcoming events will also give new constituents a chance to meet your staff in person and will likely increase their level of involvement with your organization.



## **Provide other ways to engage with your organization.**

Tell them how they can connect with your staff through Facebook or Twitter. Do you post compelling videos that are super sharable? Include a link to your YouTube channel.



## Timing

Your first welcome message should come promptly after the triggering event such as a donation, a newsletter subscription, etc. That said, you know your audience best, so experiment with the number of days or even weeks that elapse between your messages. Some organizations find that sending one message every 2 weeks for 6 weeks is effective, while others prefer weekly messages.



## Tracking

Monitor your organization's click-through and open rates and adjust your approach based on your results. Don't be afraid to change the frequency of your messages as well as your subject lines, content, and calls to action. We advocate testing different versions of each email to find what works best for your unique message and subscribers.



## Mobile

As of June 2013, 44% of email opens are happening via mobile devices. This means you need to ensure that your email is easy to read on a smartphone and that you are pointing to mobile-friendly pages. An easy way to make your email more smartphone friendly is to keep it simple, short, and optimized for fingertip navigation. Can someone easily click on your link or button with their thumb? If not, rethink your email design. Your desktop readers will thank you, too.

## Continue the Conversation

Email is one of the most effective ways to communicate with your donors. Don't waste this opportunity to be a positive presence in their inbox. By regularly reaching out with great content and strategic calls to action, you can build a stronger relationship with your supporters, turning them into loyal donors who give more over time.



## Tell Your Story

Want to really connect to your supporters? Tell them a story! Research has shown that people are more likely to emotionally connect with and remember a story over other forms of information. Think about what you want to convey and build a story around it. Donors relate more to stories about specific people or animals than to statistics. Use your emails to paint a vivid picture that donors will remember when it's time to give.

## 10 Simple Ideas for Email Content

1. Give an update on a former client or crisis.
2. Write a review of a book or movie that's relevant to your cause.
3. Share a recent success story.
4. Recap your latest event.
5. Feature a story about one of your volunteers.
6. Ask for suggestions for your next newsletter.
7. Offer a preview of an upcoming fundraising event.
8. Share a testimonial from a beneficiary or supporter.
9. Enlist a staff member to describe their favorite moment at your organization.
10. Offer a special downloadable resource, such as a checklist or poster.

## Keep the Conversation Going

You've said hello and made a great introduction to your supporters, but don't just coast until your next fundraising appeal. For more active and loyal donors, stay in touch and provide them with consistent opportunities to stay connected to your cause.

**Stay in touch.** Create a communication calendar and reach out to your supporters on a consistent and regular basis. They can't forge a great relationship with you if you're missing from their inbox!

**Keep it interesting.** Make your emails fun to receive—and read! Ditch the long-form reports and insider jargon in favor of compelling stories, featured photos and videos, and a variety of calls to action.

**Don't come on too strong.** Are your emails all fundraising appeals, all the time? Balance your fundraising appeals with success stories, progress reports, and other opportunities for supporters to get involved.

**Be a good listener.** Your email outreach should not be a one-way message. Incorporate reader feedback, give supporters a chance to interact with your content, and feature ideas and stories from your audience.

**It's not all about you.** Instead of talking about how great *you* are, focus on sharing amazing stories about your donors, volunteers, and beneficiaries.

**Be yourself.** People want to support other people, not a sterile, faceless organization. Have a personality and a point of view. Let your audience see how your nonprofit is unique and you'll leave a lasting impression.



## Make Sure Your Email is Read (and Enjoyed)

Now you know how to really engage your supporters through email, make sure your messages are getting delivered and opened. Follow these tips to help you personalize messages and refine your delivery strategy so that your emails are read (and enjoyed).

### Customize the “From” field

There’s nothing special or memorable about receiving an email from “office” or info@nonprofit.org. But when you personalize the “From” address to send your campaign from an actual person, such as your executive director or a beneficiary of your work, you’ve taken the first step in creating a relationship with your supporters.

### Limit your subject line length.

The perfect subject line length is up for debate. The rule of thumb is a 40 character limit, but some email clients display only the first 25. When in doubt, test across as many email clients as you can, and take a look at your open rates as you test.

### Perfect subject line copy.

You’ve only got one chance to make a good first impression. Your email subject lines can show how much you respect your constituents’ busy schedules by telling them exactly what they’ll find inside. Avoid using ALL CAPS, dollar signs, and exclamation points, all of which will raise flags for spam filters. To improve email delivery rates, use a spam filter test to check your email header, subject line, email body, and footer for anything that may cause your message to be marked as spam.

### Make it personal.

Formal salutations like “Dear Sir or Madam” can be appropriate when writing long form letters by hand, but with email, the expectations are less formal. Feel free to address your recipients with a familiar “Hi,” followed by their first name—provided of course that you have followed the email list building best practice of asking for first and last names.

### Bring it to a close.

The same advice to keep your content personal applies when signing off. Your emails should be signed by a real person. Some organizations like to include a small photo of the sender to create an even more personal touch. The email’s closing also provides you with the chance to add one more reminder using a post script (P.S.) to prompt reader action. This is often one of the most read elements in emails.

## Remember

- 🌱 Start by saying hello and sending a great welcome message.
- 🌱 Connect with your fans by telling stories about your organization's work and its impact.
- 🌱 Stay in touch with your supporters—don't let them hear from you only through fundraising appeals.
- 🌱 Learn from your outreach by testing different subject lines and calls to action, as well as measuring how your emails perform.
- 🌱 Refine your subject line, "from" information, and email structure to improve your delivery and open rate.