ONLINE

APPROACHES TO BUILD AND SUSTAIN

DONOR LOYALTY

Strategies nonprofits of any size can use to find more donors, keep donors loyal and **raise more money**

(Includes worksheets and to-do lists)

bloomerang **CLAIR**IFICATION

by Claire Axelrad, J.D., CRFE

Introduction

Keeping pace with the rapidly evolving mediums of communication these days is no small task. When you're a small or medium-sized nonprofit, incorporating all the latest developments can seem daunting. Fear not!

You don't have to do it *all*. You simply have to do what you do *well*. You can't think of communication, online or otherwise, as something ancillary to your fundraising. It's the core of your relationship-building and donor loyalty strategy.

So, if your online and social media experience has evolved into something of a runaway train — a little, or a lot, of this and that, and you're dealing with some half-finished projects that never really gained traction, now is a good time to take a step back and look at your online campaigns with a fresh perspective.

You don't have to be a tech wizard to do what I'm suggesting here. You don't have to do everything I suggest. But do try to choose things you can commit to keeping up with. Donors need to be kept actively engaged.

Out of sight is out of mind.

We know this because we have research on donor retention. A majority of donors are not staying loyal, and much of it has to do with how you communicate with them. Per the Fundraising Effectiveness Project, donor retention rates have consistently averaged below 50% over the past decade. Only 32% of first-time donors renew.

Per the M+R Benchmark Report, **an average 38% of donors who made an online gift in 2016 made an online gift again to that nonprofit in 2017. That means a whopping 64% did not!**

You want a communication strategy that helps you develop a more sustainable funding model, right? Then being active online is no longer optional. Per M+R, nonprofits reach more people through digital channels than ever before: email lists grew 11%, a growth rate outpaced by list growth in major social platforms (Facebook, 13%; Twitter, 15%; Instagram, 44%). Total online revenue grew by 23% in 2017, after 15% growth in 2016.

What makes your online strategy interesting, and challenging, is that revenue comes from a tapestry of sources — website, email, blog, social networks, banner ads, text-to-give. And you must figure out the particular threads that will most enrich your nonprofit's tapestry. No one strategy fits all nonprofits.

Frequency, quality and consistency of communication will be your keys to success.

Ready to revamp? To lay a strong foundation that integrates well with your other communication and fundraising strategies? To include the calls to action that will make your online social engagement worthwhile?

If the answer is yes, grab a cup of your beverage of choice, a pen, and a piece of paper for notes. Let's begin!

The BIG Picture Goal

Whatever you do, you should first know your goals so you can select the objectives and strategies that will help you reach them most effectively.

Since this ebook is oriented towards building donor loyalty, your end goal is to build a dependable coterie of followers, friends and fanatics who will:

- Share your content with others,
- Take the actions you ask of them, and
- Stick with you through thick and thin.

Your goal is to build your philanthropic foundation. You're seeking to find and engage the people who will become your volunteers, ambassadors, advocates, askers and donors. Let's call these your natural constituents; they have some connection to you and/or interest in what you do.

When it comes to building and cementing your relationship with these folks, it's not about you alone. It's about you *together*, including …

- Your shared values.
- What you can accomplish.
- What you have accomplished.
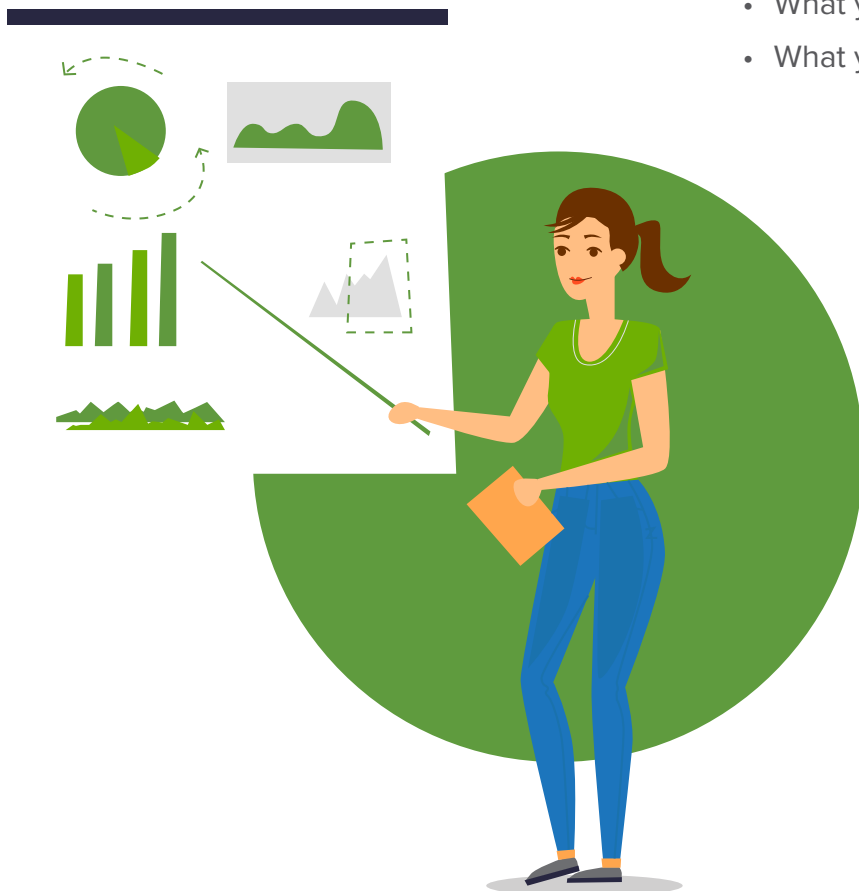
Treat your constituents like individuals with specific values, needs and desires. What they do matters. What they want matters.

- **Endeavor to learn more** about *them* so you can meet *their* needs.
- **Engage them as partners,** showing you're all in this *together*.
- **Create a community** of *like-minded* folks.
- **Welcome folks** to your *community*.

Take care of your members; not as infants (who must be educated and lectured to), but as peers and *partners* (who have something valuable to offer).

Make a conscious effort to create a *conversation*. At minimum, a two-way *dialogue*. At best a communal *exchange*.

See the words I've highlighted? *Together. Shared. Like-minded. Community. Partners. Conversation. Dialogue. Exchange*.

Make your online content creation, curation, dissemination and conversation strategy about your constituents.
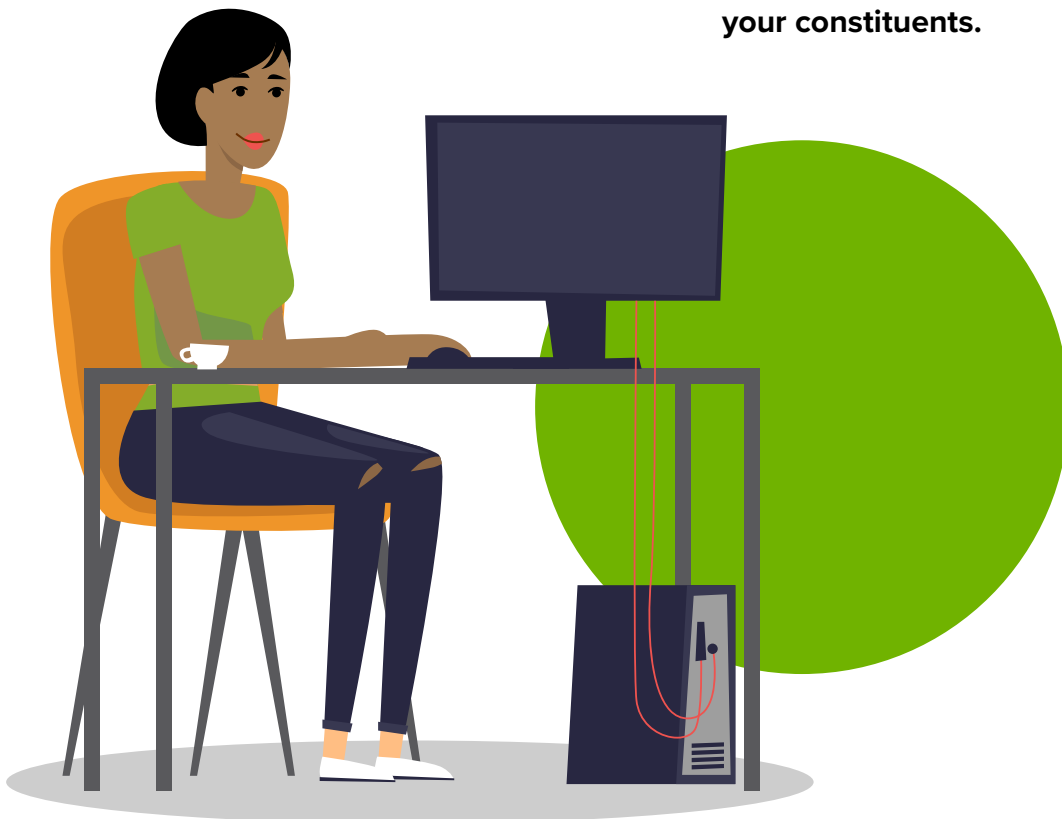
EXERCISE: Who are Your Natural Constituents?

TO DO: Evaluate how you might better get to know and engage with your current and potential supporters online. (List your ideas, using the questions below as a guideline. Don't limit yourself to these questions. Get creative!).

I. Who do you want to have a conversation with?
NOTE: Think about your goal, and about how communicating with different target markets will help you reach that goal. For some organizations, former clients (e.g., patients, alumni) may be ideal. For others, it may be the families of these clients. Local organizations may be interested in targeting certain zip codes, while national and international organizations might think more about online communities (e.g., users of Facebook or Instagram or Twitter). And everyone may want to make a distinction between prospects and donors. Or donors and volunteers. Or volunteers and staff. And so forth.

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II. **Develop personas for each of your target constituencies.**

NOTE: A persona is a descriptive version of your constituent that contains in-depth character traits, including a fun name (e.g., Susie Soccer Mom, Busby Business Owner, Wanda Widow) to help develop content and marketing communications strategy. It's useful to develop at least three different personas with unique traits within each constituent category.

Things to look at include:

- Demographics
- Lifestyle
- Interests
- Influences
- Personal goals
- Emotional/psychological factors
- How they are connected to you/interact with you
- What they want from you
- Where they look for information related to what you do

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   c. _____(name/characteristics)

III. What kinds of questions could you ask your target constituencies to better engage them?

NOTE: You can ask questions using a brief online survey with free tools such as Survey Monkey or Google Docs. Ideas might include, but are not limited to:

- What are your areas of interest? (List your top areas + "other")
- How did you first learn about XYZ Charity? (Give options to make it easier to tally responses)
- Which social media platforms do you use? (Ditto re giving options, and you may want to restrict this to platforms your charity uses)
- What type of device do they most use when accessing information online? (Computer, tablet or smartphone; did you know the share of mobile traffic increased by 9% and accounted for 40% of nonprofit website visitors in 2017?)
- How do you prefer to receive information? (Ditto, e.g. email, phone, social media, text)

Now that you have a better idea of who you're talking to, let's focus on what you're going to say, how you'll say it and when and where you'll engage.

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12 Online Strategies Your Nonprofit Can Easily Manage

1. Build a social content strategy

Before you do anything with online communication channels, you must begin with the act of writing a comprehensive online and social content marketing plan. This is the whole tamale, so to speak. You lay out all your ingredients, but first you need the wrapper — or everything will fall apart. The act of putting this in writing is an essential step, because the process of defining your goals, objectives and priorities will focus and unite marketing and fundraising staff and help motivate executive staff to make a long-term investment.

What exactly is 'content marketing' you ask?

Wikipedia says it's any marketing format that involves the creation and sharing of media and publishing content in order to acquire customers *(or, I would say, donors, volunteers, advocates, etc.).*

The Content Marketing Institute defines it as *"the marketing and business process for creating and distributing relevant and valuable content to attract, acquire and engage a clearly defined and understood target audience — with the objective of driving profitable customer action. A content marketing strategy can leverage all story channels (print, online, in-person, mobile, social, etc.), be employed at any and all stages of the buying process, from attention-oriented strategies to retention and loyalty strategies, and include multiple buying groups."*

They go on to add this very important element: *consistently creating and curating content in order to change or enhance a consumer behavior."*

Aha! The content must be designed to change or enhance your target audience's behavior. This is your direction. How to get there? By (1) creating or curating content that is relevant and valuable to your target, and (2) sharing that content in a manner likely to meet your audience where they are.

Before we visit some specific strategies to take you where you need to go, let's briefly review **the basic elements of a content marketing (or any) plan:**

- **Goals** (Why)
- **Measurable Objectives** (What)
- **Strategies** (How)
- **Tactics** (Where)
- **Timeline** (When)
- **Assignment of Responsibilities** (Who)

You know what a plan is, right? A plan is the thing that gets you around my favorite Lewis Carroll quote which is, just to paraphrase, *"If you don't know where you're going, any road will take you there."* Or not. You want to know what you're trying to accomplish with your online communications, fundraising and social media program. This is not an ebook about planning per se, but let me hit on the important highlights.

A. GOALS: Write down what success will look like for you. Before you can create or curate content that will get you where you want to go, you've got to know where that is. The top 8 content marketing goals for nonprofits are:

1. Fundraising
2. Brand awareness
3. Engagement
4. Supporter loyalty
5. Client/constituent acquisition
6. Website traffic
7. Volunteer recruitment
8. Advocacy

B. OBJECTIVES: Make sure your objectives are measurable. Once you know where you're trying to get to, you need to be able to assess whether the content you're sharing is getting you there. Ask yourself how many of the top 8 nonprofit content marketing metrics you are tracking:

1. Increased fundraising
2. Website traffic
3. Social media sharing
4. Increased numbers served/helped
5. Increased supporter loyalty
6. Increased volunteering
7. Qualitative feedback from supporters
8. Subscriber growth

EXERCISE: What's the point of your plan?

TO-DO: Determine your online communication goals and objectives. (List your whys and whats below, using the notes as guidance).

I. Goals: What is the underlying WHY?

NOTE: Think about the purpose your communications will serve. It may be as simple as "raising our annual fundraising budget." Or it may be to build an endowment or further a capital campaign. The bottom line usually has to do with money, so it's important not to lose sight of this (simply adding Twitter followers will not *ipso facto* raise more money).

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II. Objectives: What is the underlying WHAT?

NOTE: Think about what you hope to achieve with every objective. Then figure out a way to measure this so you'll be able to evaluate the effectiveness of this strategy down the line. Objectives should be broad in purpose and very specific in scope. Don't just say "To create awareness" or "To build our brand." Towards what end? Who do you want to target? Why, specifically, do you want these folks to become more aware? What do you want them to think, feel and do?

Example: If your goal is to "Develop and produce special events to reach financial objectives and to heighten visibility and affiliation," your objectives might include "recruit 10 new volunteers" and "acquire 100 new Golf Tournament attendees." You'd then have specific online strategies, tactics and timelines to help you reach these, and no doubt other, objectives.

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2. Inspire with the quality of your content

Begin at the beginning. With the quality of your content.

Not all content is created equal. If your content doesn't speak to your constituents they won't engage. They won't answer your call to action. They won't advocate on your behalf or share your content with their friends. As a result, you won't expand your constituent universe. You won't build awareness of your cause. And you won't develop a supporter constituency of volunteers and donor-investors. This is time wasting.

Think carefully about the types of content that will help you get towards your goal, and the types that won't. Keep in mind that quality is in the eye of the beholder. Think from your constituent's perspective. Not yours. You may be interested in the fact you got a new board member. Will they? The fact you revamped your website may be thrilling to you. Will your constituents care? What will be valuable to them?

Replace the idea of selling with the idea of helping.

One of my favorite marketing strategists is Jay Baer, author of *Youtility*. He says the difference between "helping" and "selling' is only two letters. But what a difference those two letters makes! (For more on this, please check out my article on Why Nonprofit Content Marketing Should Help; Not Sell).

There are all sorts of reasons why you may choose to give these gifts of content. To raise money. Create awareness. Recruit volunteers. Build loyalty.

EXERCISE: How can your content be helpful?

TO DO: Make a list of all your "gifts" of content, and put them into a calendar. If you want gifts, you must first give them. And social media (any media with the potential to be interactive) is a powerful gift-giving tool. You give, give and give. Then, not surprisingly, they feel moved to give back! Spend some time thinking about what you've got to give. Digitally. Moving stories? How-to tips? Recommendations? Whitepapers? Inspirational quotes? Humor? Recipes? Evocative photos or video? (Make a list of what you've got and what you could easily create).

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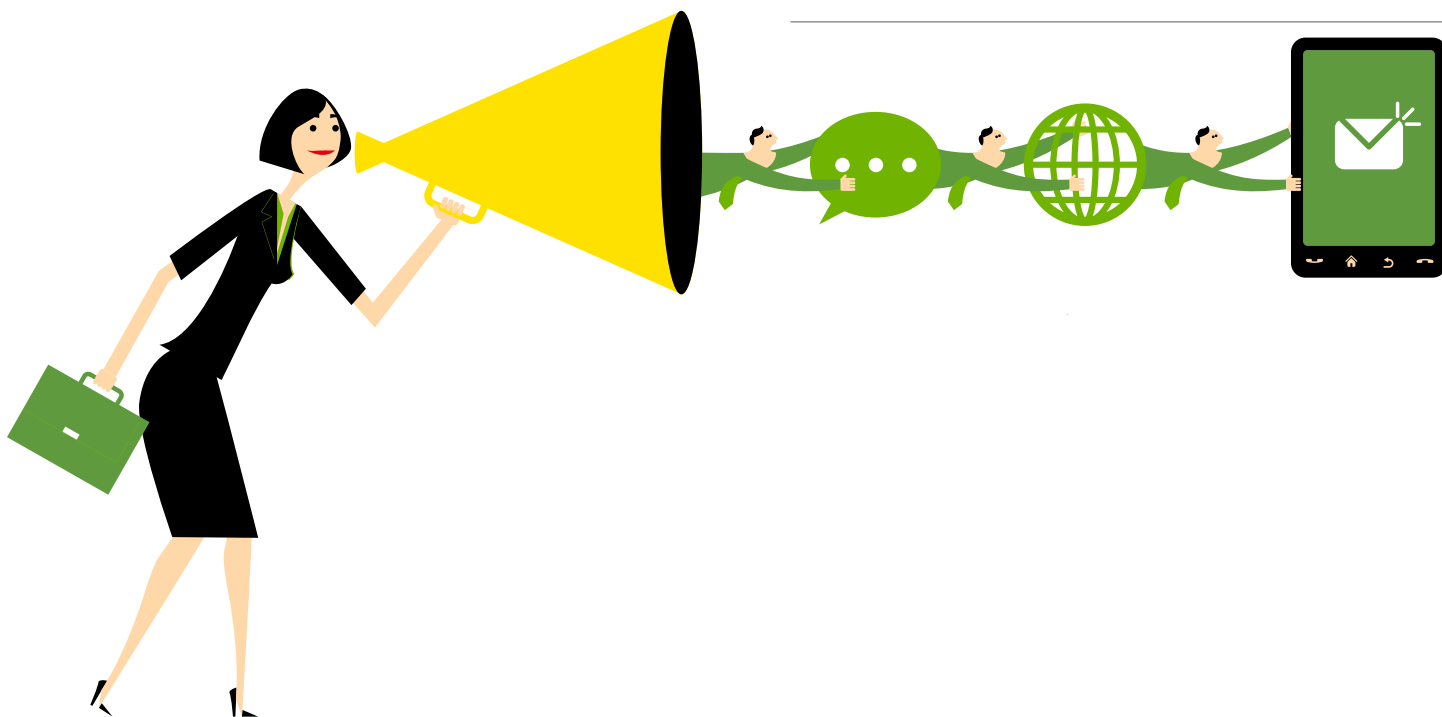
3. Determine your communication frequency

If you can't publish consistently, it may be better to not publish at all. Okay, I don't really mean that. But... sort of. Absolutely you must publish. You must communicate. But don't spread yourself so thin that you wind up with one tweet or Facebook post every month or so. It just makes you look like you're missing in action.

Quality has to come before quantity. Don't become paralyzed by all those articles and/or infographics you read that say you should post three times a day on Twitter, five times a day on Facebook and so forth.

Since every communication can't be a monetary ask (I've heard it recommended you send anywhere from three to seven communications for every monetary solicitation, and I tend towards the higher end. More communication is more when you're trying to make friends and build loyalty), you need to communicate enough to get your asks in.
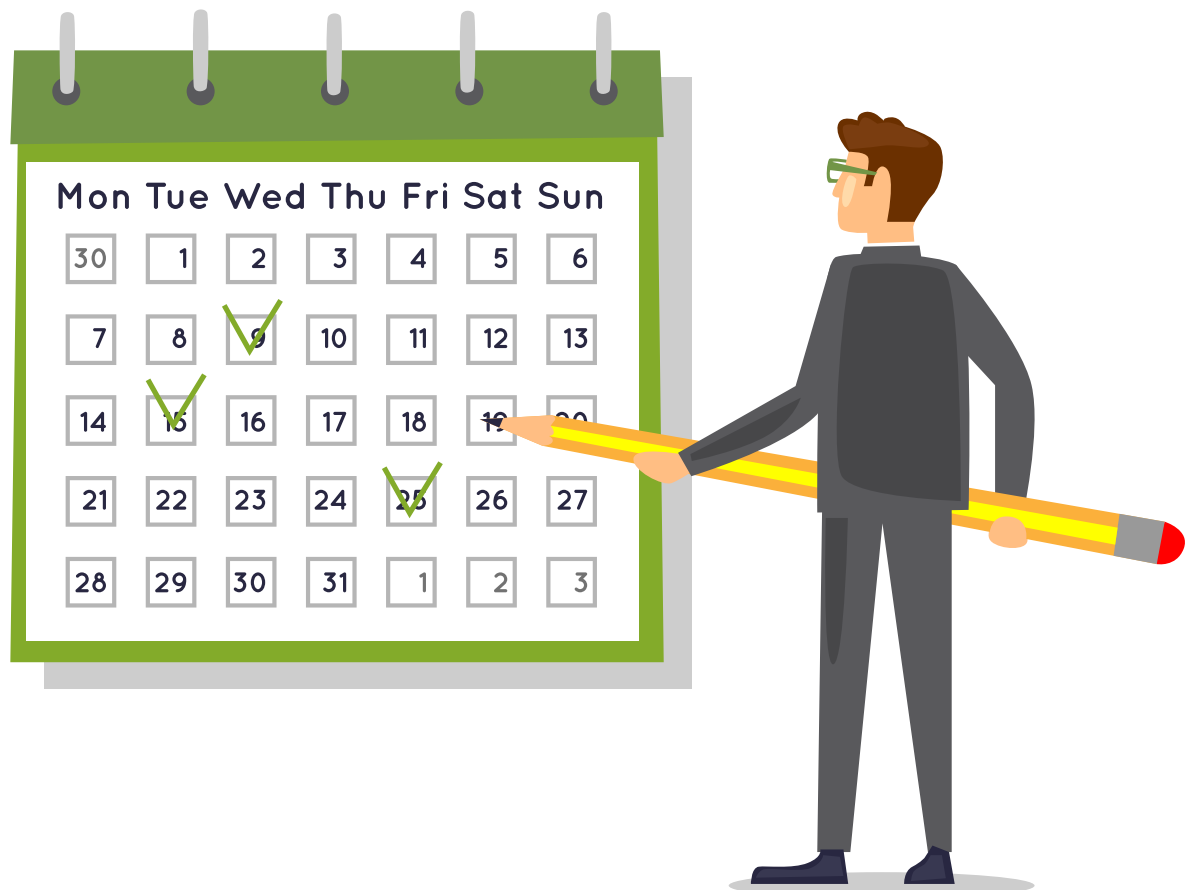
EXERCISE: Balance asks with non-asks

TO DO: Chart your communications using an excel spreadsheet, downloadable calendar or whatever project management system works for you. Use this example as a guideline:

- Imagine you want to make one ask per quarters 1, 2 and 3, and four asks in the giving-intensive 4th quarter (assuming you operate on a calendar year). Then you might need to calendar in 21 "gift of content" or interactive communications in the first nine months of the year (seven non-asks for every three asks), and 28 communications in the last three months.

People *want* to hear from you! Research has found 53% of donors leave an organization because of its lack of effective communication. You can balance messaging across the communication channels you choose to use, including your website, blog and/or e-newsletter, targeted email and social networks.
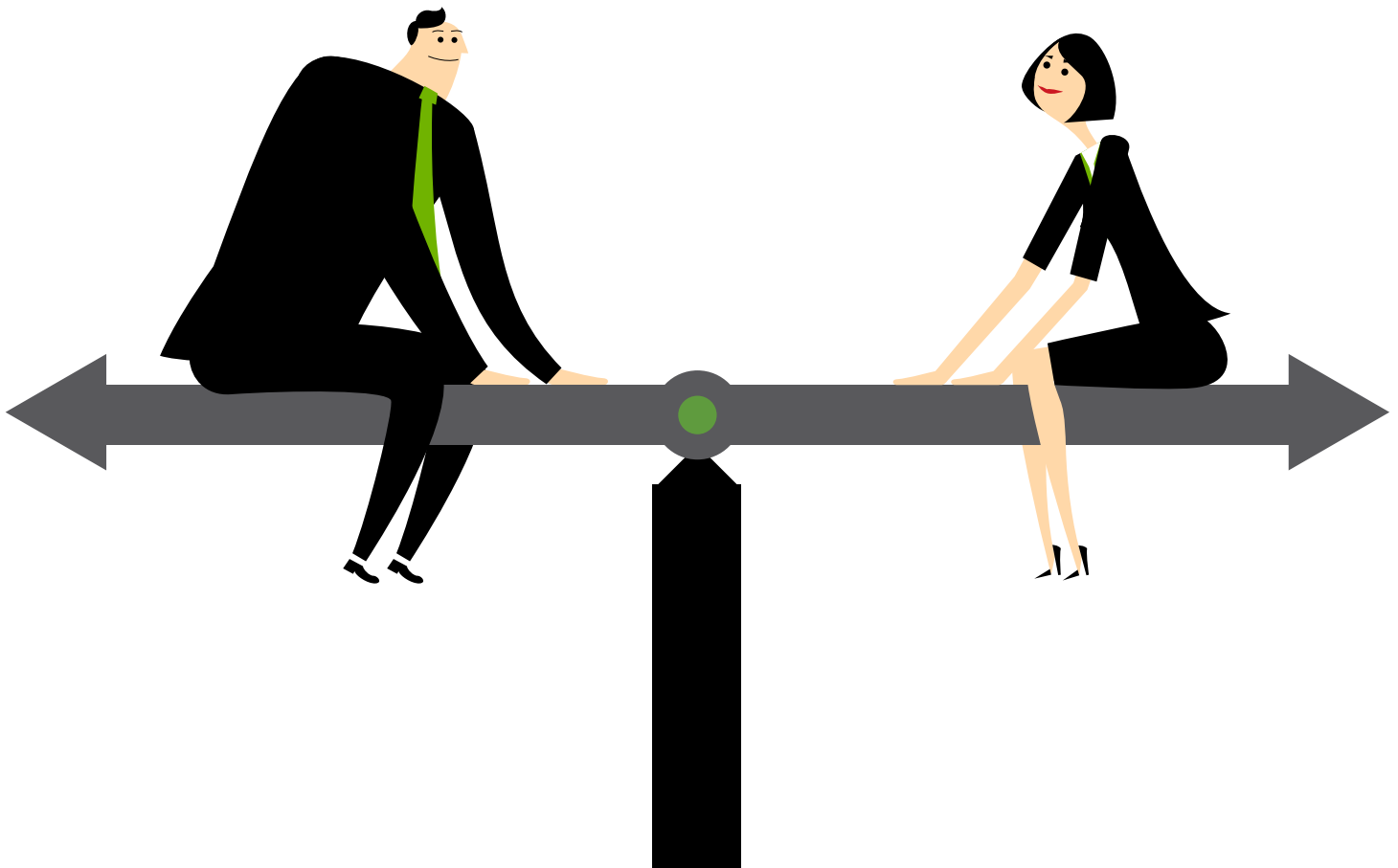
4. Tell more stories

In a survey of 2,833 donors, Software Advice found that, when asked what communications they wanted to receive from nonprofits they support, 60% of donors said they wanted impact and success stories. In fact, donors said their decision to give again hinges on your ability to show lasting, effective accomplishments.

Please don't worry about sending too many stories about impact. Folks sign up for your email list because they want to hear from you. The same is true with social media. They want to be kept in the loop. The less you connect with them, the likelier they will feel disappointed and lose interest in your organization.

Stories are your secret weapon. Humans are wired to embrace them. I've never met a nonprofit that didn't have a myriad of stories hiding in plain sight. You just need to make collecting such stories part of your culture. Tell stories wherever you can, especially where you know your donors hang out. The more you tell, the better donors feel. Especially when you make them the hero of the stories!

EXERCISE: Pick at least one story to tell, and then imagine the many ways you can tell it across multiple channels

NOTE: One strategy is "drip storytelling," much like the serialized magazine stories that allowed readers to follow along as the project unfolded. Consider having different voices tell the story through different perspectives (client, family member, care worker, donor, etc.).

Here are examples of a story about rescue pets being told simultaneously on the organization's website, Facebook page and Twitter:

Also consider "transmedia storytelling," the technique of developing a story across multiple media. For example, this is a way to get folks who are Facebook fans to also become Twitter followers — where they can catch up on the rest of the story. Remember that online storytelling is briefer than offline, and a picture really is worth 1,000 words. So think carefully about stories for which you have illustrative photos.

5. Use more visuals

The brain processes visual information 60,000 times faster than text. Images are powerful. About 90% of the content that enters peoples' brains is non-verbal. **You will generate up to 94% more views if you add visuals and graphics to your content.** So do this everywhere. On your website. Your blog. Your e-newsletter. Social media. Don't be stingy.

There are plenty of sites with free stock photos. Tools like Canva and Pablo make it a lot easier than you might imagine to create graphic images. The increased engagement you get will make it well worth your effort. When people are able to visualize a problem they react viscerally. Their gut gets involved. It talks to their heart. The heart trumps the head. Every time.

EXERCISE: What kinds of visuals will put a human face to your nonprofit's work?

NOTE: Happy photos are best for impact reports and thank you's, while sad images work best for fundraising appeals. The former make donors feel good about their contributions; the latter move them to want to donate. Close-ups of faces, people hugging, big eyes staring right at you and/or landscapes that evoke nostalgia, awe or fear, are good choices.

Stay away from large group photos, empty buildings and off-center images where there's a lot of unfilled space.

(List your ideas. I always like to include a caption to remind me of what I'm trying to convey. Plus, often your best message is simply the photo + caption that, more or less, tells a complete story).

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[Photo]   [Caption]

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[Photo]   [Caption]

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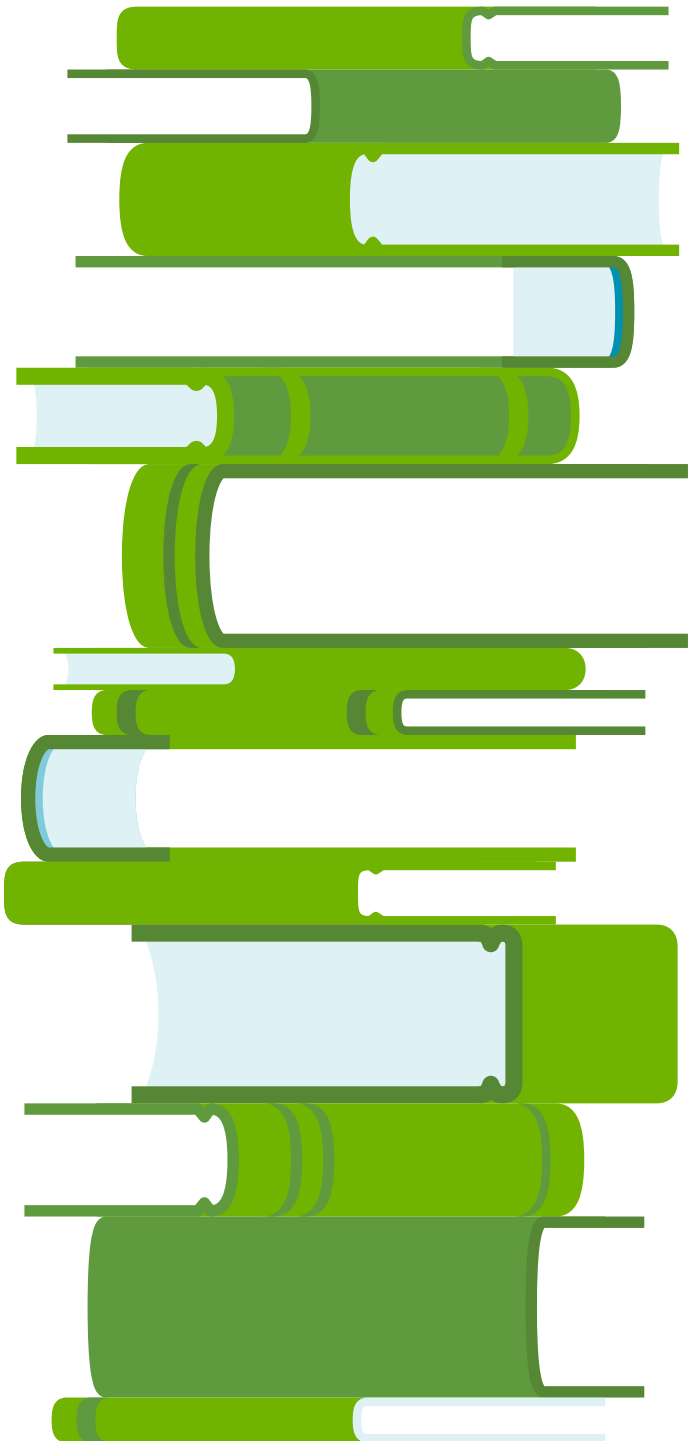[Photo]   [Caption]

5. _____

[Photo]   [Caption]

6. Blog

My first online channel choice for you is a blog. I'm a huge booster of blogs. Next to email, they're the most mature form of social media. They've been around the longest, and they're pretty tried-and-true.

I'd love to see you make your blog the hub of all your content marketing. Blogs drive folks to your site, inform them about your cause and get them actively engaged in what you do. As nonprofit leaders Allison Fine and Britt Bravo remind us in Building Better Nonprofit Blogs, they're an awesome place for ongoing, substantive conversation that builds sustained relationships. And they're a great place to get started with social media writing.

I'll be writing another ebook for Bloomerang later this year on how to get started with blogging. If you can't wait, and want to learn more now about how to rock your blog, check out my Nonprofit Blogging that Drives Engagement Playbook.

7. Pick your social networks

This is the hard part. I said in the introduction you don't have to do everything and be everywhere. I used to advise mastering one channel and building from there. Now I'd prefer to see you on two platforms unless you have a totally homogenous audience. It's seldom a good idea to put all your eggs in one basket.

Strive to be active on at least two social networks.

This is probably the maximum for a small nonprofit. But try experimenting with a third one that can help you grow outside of your normal market (perhaps you want to appeal to a younger audience, or a more global audience). It's not sustainable to be on too many at once, unless you have tons of staff and resources.

Plus your audience is paring down the number they use.

Facebook is most used, while Twitter and Instagram are next. But look at your audience and where they are. It's possible that LinkedIn could be the best choice if you're targeting professionals, or Pinterest for women, including those in rural and suburban areas. WhatsApp, Line and Snapchat also are becoming increasingly popular. If you're in multiple countries, other platforms will show up.

You can google the demographics of each platform and see how they match yours. You can also survey your audience to find out which platforms they use. Begin with a channel or channel you've discovered that is frequently used by your constituents. Then, own it. Promote yourself as an expert in your field. Offer useful content that helps, not sells. Be the go-to resource!

The truth of the matter is that we exist in a highly networked, technological world. It's likely many of your supporters (and would-be supporters) spend a large part of their waking hours online. So it just makes sense to spend time figuring out where your target audiences get their information.

TO DO: Try a short one-question survey using Survey Monkey or Google Docs (both have free versions) and ask folks where they get their news! Once you get results, consider how to be more strategic with your resources.

8. If you use LinkedIn, claim your Company Page and keep it current.

LinkedIn can be a terrific resource, but is often overlooked in most social media strategy for nonprofits. Did you know that engagement on LinkedIn (click-throughs) is higher than Facebook or Twitter?

I highly recommend you have a LinkedIn Company Page because that's where professionals hang out. You know, folks with jobs and money (aka, likely donors and C-level executives who hold corporate and foundation purse strings).

Make sure you optimize your profile by filling everything out, updating it regularly (this alerts your followers to check you out) and even publishing articles on LinkedIn to establish yourself as a thought leader and create engagement. Also suggest to staff, volunteers and lay leaders that they add you to their own LinkedIn profile, thus extending your reach to their networks.

TO DO: You can find lots of great ways to leverage the power of LinkedIn for your nonprofit here, here, here, and here.
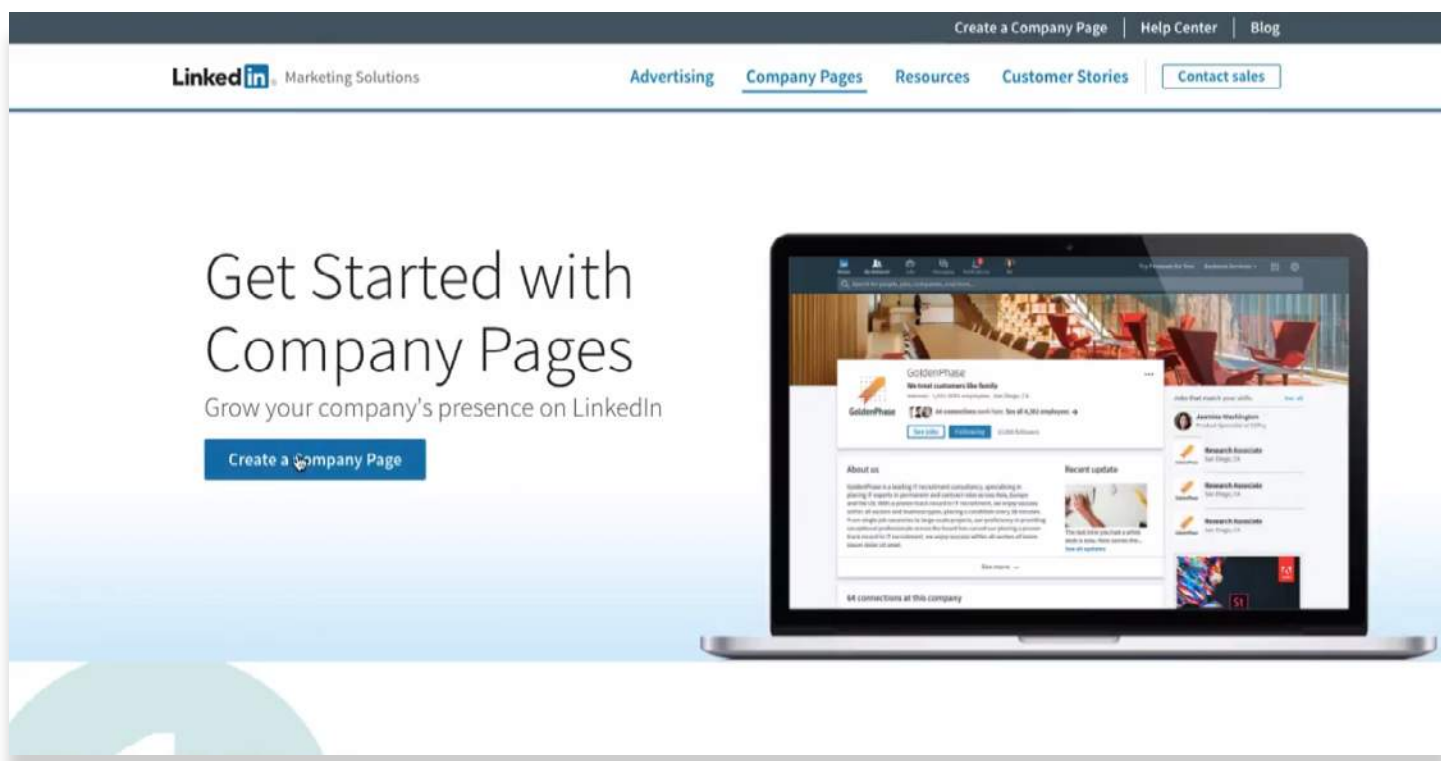
9. Don't keep your channels to yourself

Once you've settled on the online communications channels you can handle effectively, don't keep it a secret!

Incorporate a "call to follow" in everything you publish. This means **prominent share buttons** on your website home page, website landing pages where you share stories, blog, e-newsletter, email signature and thank you emails. Don't forget a "share by email" button. It's still the number one way people share blog posts, followed by Facebook and Twitter.

10. Don't automate everything

At first blush, this may seem like a time-saver, but using automated updates is often not a good idea. Sure, it's useful for scheduling delivery of your content. But your social media followers want to know they're dealing with a human, not a robot. Plus, if you're small you can really stand out by taking time to add personal touches to your social media interactions.

TO DO/NOT TO DO:

- Do refer to people by name.
- Do avoid generic-sounding tweets like "Check out our latest blog." Instead, give a small, specific introduction to your blog's content and then link to it.

- Do avoid automatically scheduling direct messages (DMs) on Twitter. These come off as "spammy."
- Don't automatically schedule the same message for all networks. With Twitter, make sure your message is clear and concise. For Facebook, add more information and an image to increase engagement. For LinkedIn, adjust your tone to fit a professional audience.
- Don't automatically send out articles from other sources without first reading them.
- Don't "set and forget." Login daily to see who is interacting with your accounts. Comment and respond, as appropriate.

11. Use a visually compelling avatar consistently on all social networks

This is *like* a logo and serves as your visual representation online. (The avatar is that tiny picture that represents you or your business on a social media network). The best ones are *not* your logo, because it likely wasn't designed with social media in mind. Simply cropping a logo, resulting in unreadable text, will not create brand recognition for your cause. It can be some *variation* of your logo, however.

Stay away from default avatars that make it appear as if no one is home.

Twitter Egg


Facebook Silhouette
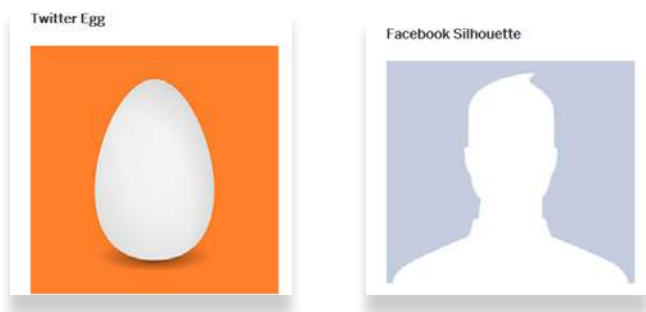
The best avatars are:

- Square
- Colorful
- Simple
- Well-designed (no text that's too small to read)
- Light on text
- High resolution (so they're not blurry)

For examples of good avatars, check out:

Nature Conservancy — Just the visual stylistic green earth from their logo

Goodwill International — Just the visual from their logo; includes the name in a square

Save the Children — Variation on their logo with visual plus name of organization, arranged in a stacked square format
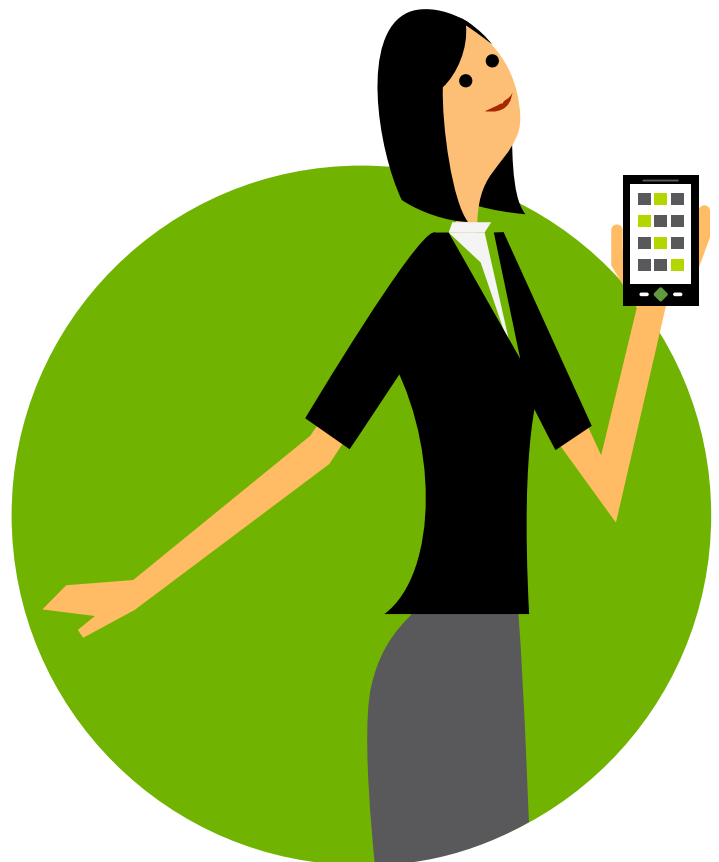
Here are some other examples:

If your CEO is your chief communicator, then their professional profile photo may be a good option. Make sure you upload the right size image for the social network in question, because uploading an incorrect size can cause the image to blur — or maybe even chop off your head! Most social networks offer editing tools for your avatar.

Use your avatar on every single online network to build a synergistic, identifiable brand across the social web. This is just good branding. You want your supporters to recognize you across channels so that one message reinforces the next.
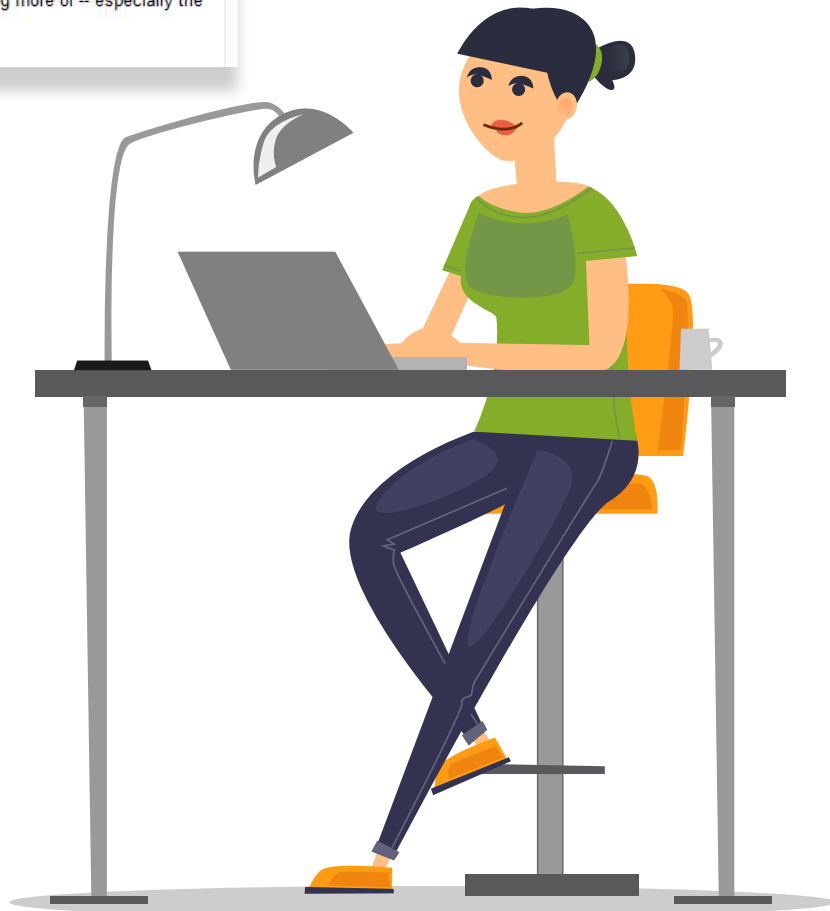
12. Don't neglect website speed and ease of use

You must make giving to you easy! The impulse to give can be a fragile thing. Ever set out to make a purchase online, only to give up when the website loaded too slowly? Or you had to click through too many pages? Or the form you needed to complete required you to answer more questions than felt comfortable? Or the site didn't look secure?

Donors feel the same way when it comes to making a donation via your website. M+R found **nonprofit homepages took 3.181 seconds on average to load content visible to the user, while the main donation page on each site loaded in 2.816 seconds.** Yet nearly half of web users expect a website to load in two seconds or less. Uh oh. Research shows a one-second delay in page load time can lead to an 11% decrease in traffic, and significantly fewer conversions.

As a fundraiser, this may not be your area of responsibility. But if you want to succeed in your job, it's incumbent on you to talk with your IT and management staff about this critically important aspect of your overall online marketing and fundraising plan. Tell them M+R recommends using WebPageTest.org, a Google-supported tool that evaluates several metrics relating to how quickly a web page loads.

SUMMARY

Use these 12 tips as a checklist for building an online communications plan that will be worth the effort – rewarding both you and your supporters!

Rather than doing what you've always done, do what you should be doing to meet the demands and live up to the expectations of today's consumers.

Even if you're small. Because if you don't, you're going to stay small.

Digital media provide an awesome means of creating awareness of your mission, engaging folks who share the values your nonprofit enacts and building a community of passionate, loyal supporters.

Don't leave donor communications entirely up to your marketing and/or technology staff. Integrate content marketing and fundraising so they work together seamlessly to accomplish your objectives.

Even though your organization may be divided by department or function, your communication with donors should be unified. Presenting a united front to the world is essential if you want your vision to be crystal clear and your mission compelling.

To your success!

About the **Author**

C laire Axelrad, J.D., CFRE, is a fundraising visionary with 30 years of frontline development work helping organizations raise millions in support. Her award-winning blog showcases her practical approach, which earned her the AFP "Outstanding Fundraising Professional of the Year" award.

Claire, who teaches the CFRE course that certifies professional fundraisers, is a regular contributor to Guidestar, Nonprofit Pro, Network for Good and Maximize Social Business. Her passion is coaching nonprofits to address 21st century challenges and overcome barriers to sustainable funding.

Find out more >

About **Bloomerang**

We believe in the value of life with a mission, and we applaud the choices nonprofit organizations make to improve the world.

We exist because they exist. We take great pleasure in creating tools and teaching principles that help passionate nonprofit organizations make smart decisions that are proven to help them reach out, grow and thrive.

Our Strategic Vision: to be the world's best developer and deliverer of tools and perspectives that generate value for nonprofit donor relationships.

Our Core Purpose: to improve donor retention in the nonprofit world.

At Bloomerang, we're helping nonprofits become more successful at increasing revenue. Our user-friendly software is designed to help organizations naturally boost donor engagement, fundraising and retention through best practices and a user-friendly donor database interface.
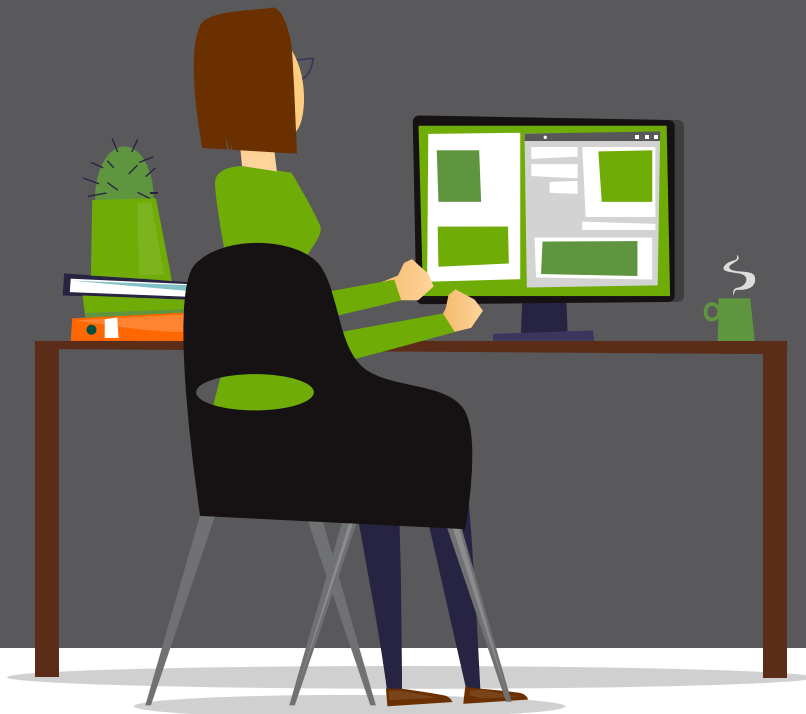
Take a look at why Bloomerang has been rated "The Best Donor Management Software" based on user feedback.

Explore a demo of our software >

bloomerang

"Donor communication is not an add-on. It is a core fundraising function that produces long-term income security. Make meaningful communication with donors your development department's top priority."

—Penelope Burk, Donor-Centered Fundraising