


Large, vibrant green Monstera leaves with characteristic holes, positioned on the left side of the slide.

# Welcome to Bloomerang Academy

Thank you for joining us!

Please tell us where you are joining us from and what the weather is like where you are....drop it in the CHAT!

Large, vibrant green Monstera leaves with characteristic holes, positioned on the right side of the slide.

# Housekeeping

**Live Transcript**

We all know what we want to do is spend  
administration and more time Doing the w

Hide Subtitle

View Full Transcript

Subtitle Settings...



Chat



Raise Hand



Q&A



Live Transcript

**Share ideas**

**Ask questions**

# Housekeeping

Our dial in number in case you need it today: **+1 669 900 6833**

We will share the slides and recording of this session with you via email later today.

Any questions we are not able to answer live or in the Q&A will be addressed after the session via a follow-up.

If you need further assistance, please reach out to [support@bloomerang.com](mailto:support@bloomerang.com). Our support team is amazing!

# Poll



# Diana Otero

Senior Product Marketing Manager

Diana Otero is a Senior Product Marketing Manager at Bloomerang. She served on the board of the Nantahala Hiking Club, one of the 31 trail maintaining clubs of the Appalachian Trail Conservancy, a nonprofit driven and powered by volunteers. She is currently an active volunteer and auxiliary member of VFW Post 7119 in Indianapolis, IN, a nonprofit veterans service organization.





# Margie Worrell

Curriculum Manager

Margie Worrell is the Curriculum Manager at Bloomerang. She serves on the board of the Peace Learning Center in Indianapolis, and has worked extensively with nonprofits as both a staff member and a lead volunteer. Her passions include education, theatre, her two children and her two small dogs.



Get Your Database ready for  
the Giving Season Now!



# Agenda

1. Settings
2. Fundraising
3. Emails
4. Reports and Segments
5. Q & A
6. Resources





# Settings



# GT Database Set-up in Bloomerang

## Campaign vs Appeal



**Campaigns** are overarching efforts - your EOY push is most likely going to meet your annual goal. If so, your campaign should be your annual campaign.



**Appeals** are asks, or ways the money is coming in. Asking for a gift through a Giving Tuesday email is an appeal. Add appeals for each separate effort to bring in money through the end of the year.

## Sample Appeals:

- 2024 EOY Appeal
- Giving Tuesday Appeal

## Resources:

- [Funds, Campaigns, and Appeals Basics](#)
- [Create and Manage Funds, Campaigns, and Appeals](#)

# Campaign Progress: Dashboard

### Edit Details

[Cancel](#) [Save](#)

**Name**

**Active?**

**Goal**

**Date Range**

**Start Date**

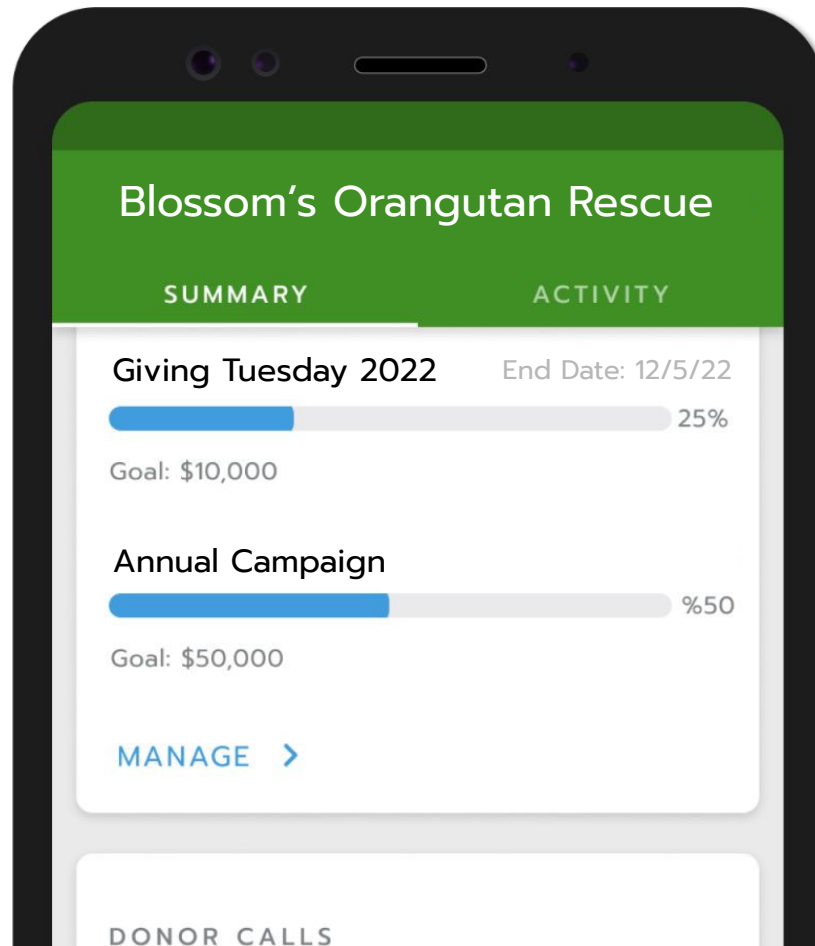
**End Date**

Track the progress of **Active** campaigns with a **Goal** on your Dashboard.

To see a report of transactions to that campaign, click **View transactions**.

CAMPAIGNS		<a href="#">View all</a>
<b>GivingTuesday</b>	11/23/20 – 12/02/20	
<div style="width: 0%;"><div style="width: 0%;"></div></div>	0%	
<a href="#">View transactions</a>	GOAL: \$10,000	
<b>Annual Campaign</b>	01/01/22 – 12/31/22	
<div style="width: 76%;"><div style="width: 76%;"></div></div>	76%	
<a href="#">View transactions</a>	GOAL: \$50,000	

# Campaign Progress: Mobile



# Demo



# Online Forms



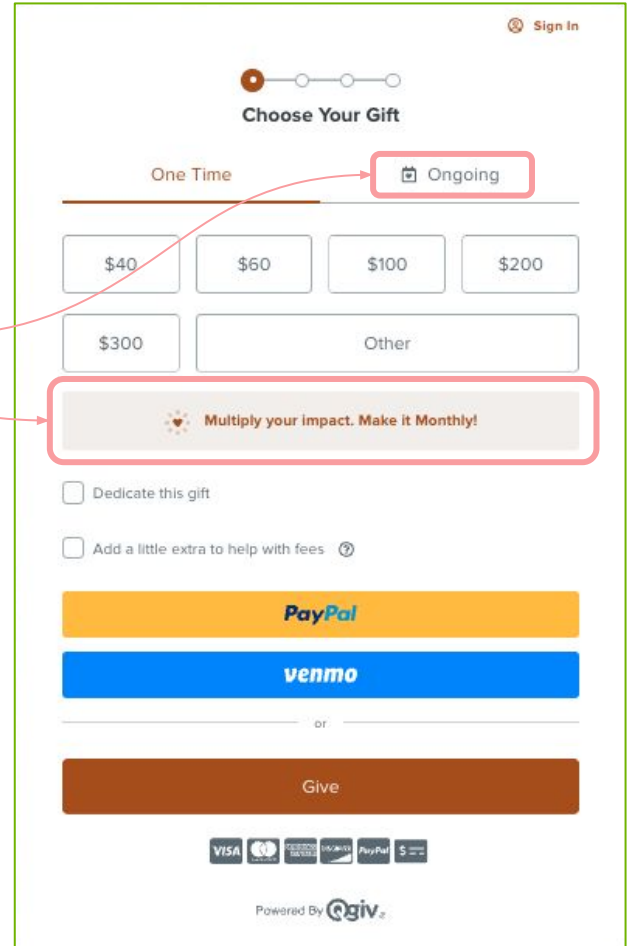


# Technical considerations

- Is your website secure?
- Is your form mobile-friendly?
- Does your website load quickly so visitors don't get frustrated and leave before completing their donation?
  - Check your web speed with free tools like [Google's PageSpeed Insights](#). If it looks like images are slowing down your site, try optimizing them for free with an online image optimizer [like this one](#).
- Are donations properly processed through your payment processor? Do you get notifications when a donation is made?

# Maximize revenue

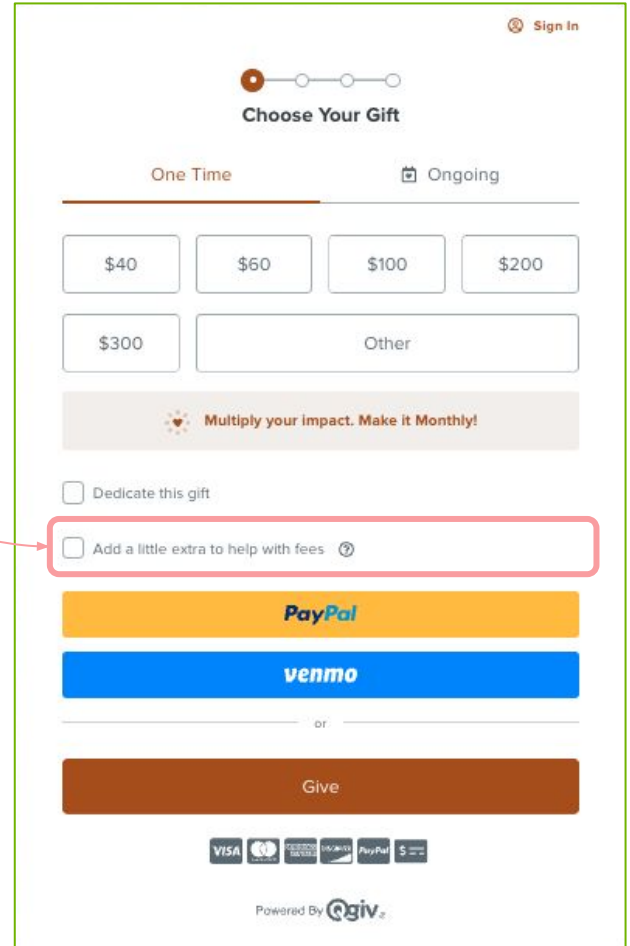
Does your donation form offer recurring donations?



The screenshot shows a donation form interface. At the top right is a "Sign In" link. Below it is a progress indicator with four circles, the first of which is filled. The heading "Choose Your Gift" is centered. There are two radio button options: "One Time" (selected) and "Ongoing" (highlighted with a red box). Below these are five buttons for donation amounts: "\$40", "\$60", "\$100", "\$200", and "\$300", plus an "Other" button. A red arrow points from the text "Does your donation form offer recurring donations?" to the "Ongoing" option. Below the amount buttons is a grey box with a heart icon and the text "Multiply your impact. Make it Monthly!" (highlighted with a red box). Below this are two checkboxes: "Dedicate this gift" and "Add a little extra to help with fees". At the bottom are three large buttons for payment methods: "PayPal", "venmo", and "Give". Below these are logos for VISA, American Express, Discover, Mastercard, PayPal, and a credit card icon. At the very bottom is the text "Powered By Qgiv".

# Maximize revenue

Can donors help cover processing costs?




Sign In

Choose Your Gift


One Time  Ongoing

\$40 \$60 \$100 \$200

\$300 Other

 Multiply your impact. Make it Monthly!

Dedicate this gift





Add a little extra to help with fees 


**PayPal**

**venmo**

or

Give

VISA    PayPal 

Powered By 



# Put on your donor hat

- Is it easy for website visitors to find your online donation form?
- Is your website mobile friendly and is it easy to make a donation from a phone?
- Do you offer varying suggested donation amounts?
- What payment options do you offer?
- Does your donation form properly total and display donation amounts?
- Does the donor receive an email receipt and thank you message after their donation is processed?

# Demo



Large, vibrant green Monstera leaves with characteristic holes are positioned in the top-left and bottom-left corners of the slide.

**How are you sharing  
your forms?**

A portion of a large, vibrant green Monstera leaf is visible in the bottom-right corner of the slide.



# Expand your reach

- **Ask your team.** Can your team, board, or volunteers share posts about your campaign? Would your sponsors and community partners be willing to share tagged content? It may help to create a media kit for your team to make it easier for them to execute your ask.
- **Ask your supporters.** Try including a call-to-action in your donation thank-you email or thank-you page that asks donors to share a #GivingTuesday campaign post on social media after they've donated. Not only can this help them feel good about their contribution, it can indirectly inspire their network to donate as well.

***Never underestimate the power of a share!***

*Now is the time to rally your team and get your group of social ambassadors together to help amplify your message.*


# Emails



# Sample post-giving season communication plan




# Simplified giving season communication plan




**Pre-Giving Tuesday email** – Help donors understand your impact

**Giving Tuesday email** – Encourage your donors to give and share your message



**Donation made!**

**Post-Giving Tuesday email** – Show gratitude for the gift



We'll talk more about how to segment this communication so it resonates with your donors in just a moment.

# Giving Season Email Plan

- **TIPS:**
  - Plan your email cadence
  - Click all the links and buttons to ensure that they are working
  - Look at the backend of everything to ensure that all activity is being recorded
  - Preview all reply emails/responses to make sure they are correct and sending properly
- **But more importantly, what can you do now?**
  - What can you create and schedule in advance?
  - Be thinking of the next touch point AFTER the acknowledgement and thank you.

# Email is easy with Bloomerang



bloomerang << All Search for constituents

Home  
Constituents  
Groups  
Reports  
Communications  
Emails  
Letters  
Forms  
Engagement Surveys  
Tributes  
Data Tools  
Settings  
Kindful

### Emails

Search Emails Active Inactive Scheduled Sent Show more filters

Name	Frequency	Type	Purpose	Last Modified	Last Sent	Action
2024 Annual Gala Invite	WEEKLY	Constituent	Special Event	7/23/2024 by margie worrell	8/19/2024 by margie worrell	Action
Recurring Donation Reminder for Next Month	MONTHLY	Transaction	Other	2/27/2024 by margie worrell	8/15/2024 by margie worrell	Action
Thank you for donation		Transaction	Acknowledgement	3/19/2024 by margie.worrell	8/10/2024 by <System>	Action
Education Newsletter	MONTHLY	Constituent	Impact/Cultivation	4/9/2024 by margie.worrell	8/3/2024 by margie worrell	Action
Pledge Reminder for Next Month	MONTHLY	Transaction	Pledge Reminder	1/18/2024 by margie worrell	8/1/2024 by margie worrell	Action
Bloom Center News 10_19_2023	MONTHLY	Constituent	Newsletter	5/8/2024 by margie worrell	8/1/2024 by margie worrell	Action
tax s test		Transaction	Receipt	2/12/2024 by margie worrell	2/12/2024 by margie worrell	Action
2023 Annual Report email		Constituent	Impact/Cultivation	2/7/2024 by margie.worrell	2/7/2024 by margie worrell	Action
2022 Giving Tuesday Thanks--returning below			Acknowledgement	12/11/2023 by margie.worrell	11/30/2023 by <System>	Action
2023 Giving Tuesday Donation Request				10/5/2023 by margie worrell	11/1/2023 by <System>	Action

Delivery Status New Email

Reset Filters

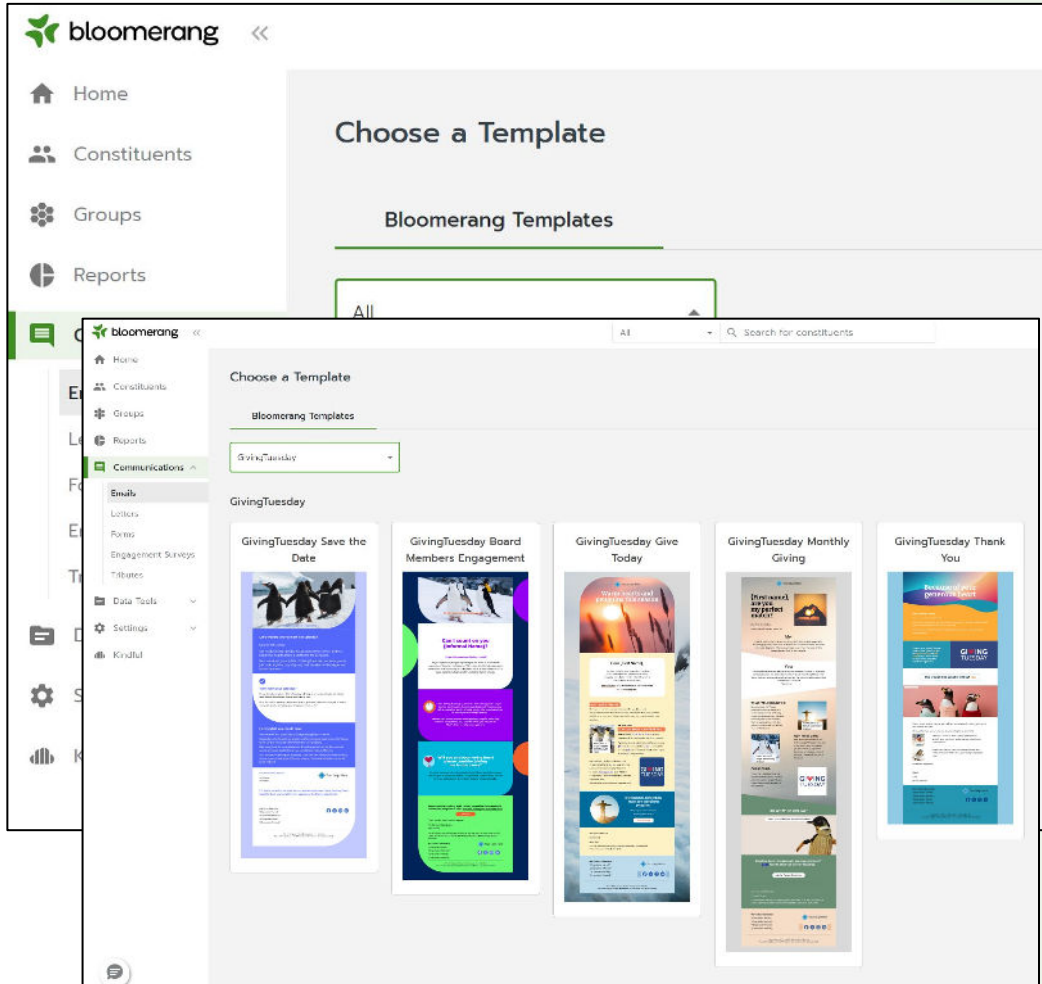
No matching email templates in your list? Click New.

Have a prior email that will work with some tweaks? Click to copy and edit the copy to fit this purpose.



# Check out our new templates!

We worked with an industry expert to compose and design beautiful templates that will resonate with your donors. They are customizable so feel free to make them your own!



# What can be scheduled in advance?

Create it, schedule it and check it off!

In Preview mode, you can select to Send Now or Schedule for Later.

Preview Email 2022 Giving Tuesday Donation Request

Cancel Make Changes **Send** ▾

**Constituents Found** 250

Email Addresses Found 95

Email Addresses Skipped -21

**Emails to Send** 74

We skip sending emails to constituents who:

- do not have a valid email address
- have unsubscribed from this template's email interests or opted out of all emails
- do not have values, or have more than one value for a transaction merge field in the email

[View strategies](#) for handling skipped recipients.

Send Now  
Schedule for Later

 Design Preview

▾ Recipients

📌 Skipped Recipients

# Setting the schedule

You can set the frequency to be:

- Daily
- Weekly
- Monthly
- Once

Depending on the frequency you select, you can customize your send schedule.

Be sure to include yourself as a recipient so you can verify what was sent.

## What can you schedule in advance?

Consider scheduling a donation acknowledgement/thank you for donations made on Giving Tuesday, for volunteers who signed up to help with your Giving Tuesday efforts, or for any other communication that you know you will need to send on the big day!

### Schedule Email ✕

Bloomerang will send this email to each constituent on the recipient list immediately on this date, time, and at the specified frequency.

**Frequency**

Once ▼ 11/30/2022 📅 12:00 AM ▼

Cancel Save And Schedule

# Follow Up Plan



# Consider segmenting your donors

After you segment, create different follow-up plans

Consider calling them? This could start to build a new relationship. Or email and tell your story and what they can expect from your organization.

**New donor –  
above average  
donation  
amount**

**Repeat donor –  
above average  
donation  
amount**

Do something special? Consider sending a video thank you. Recognize that they have gone above and beyond.

Acknowledge their first gift and explain how it will be used. Tell a story and set stage for what will come next.

**New donor –  
below average  
donation  
amount**


**Repeat donor –  
below average  
donation  
amount**

Consider reaching out to get feedback.


# Simplified giving season communication plan





Large, vibrant green Monstera leaves with characteristic holes, positioned on the left side of the slide.

**What are some other  
ways to segment as you  
follow up???**

A smaller portion of a Monstera leaf, located in the bottom right corner of the slide.

# Reporting



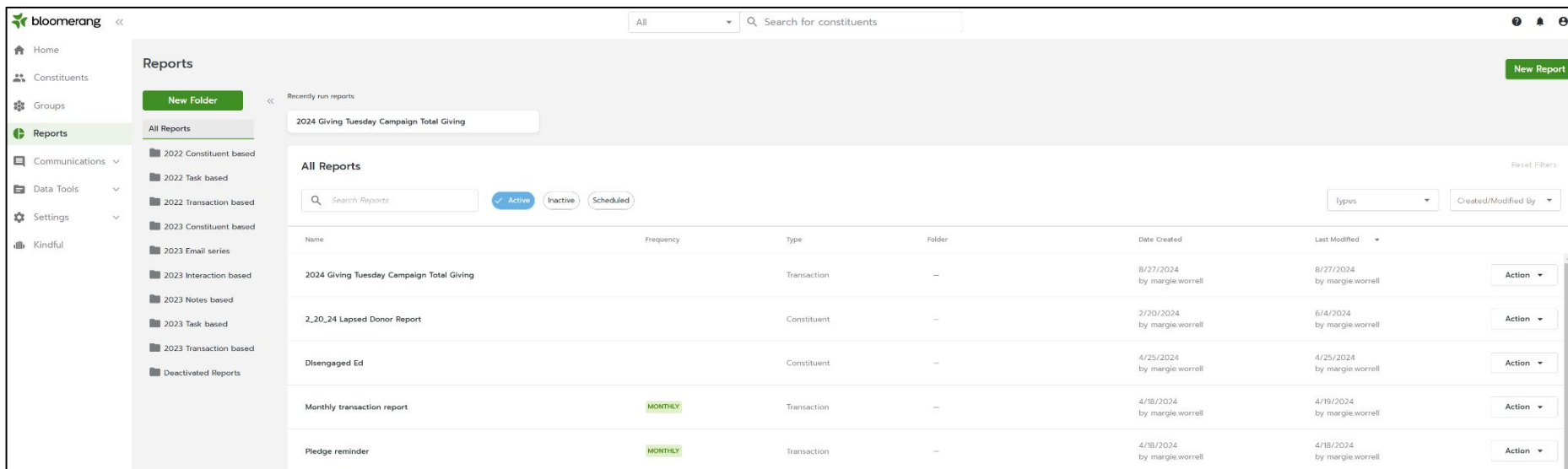
# What types of information will you want post giving season?

- Campaign total revenue
- Campaign average donation amount – Use this for the ave. mentioned below
- New donors—above average donation
- New donors—below average donation
- Returning donors—above average donation
- Returning donors—below average donation

We can reference these reports in our emails. These are our segments.

# Set up your reports and schedule to send later

You can set the filters, date and recipients for your report now!



The screenshot displays the Bloomerang Reports management interface. On the left is a navigation sidebar with options like Home, Constituents, Groups, Reports, Communications, Data Tools, Settings, and Kindful. The main area is titled 'Reports' and includes a 'New Folder' button and a search bar for constituents. Below this, there's a section for 'All Reports' with filters for 'Active', 'Inactive', and 'Scheduled'. A table lists several reports with columns for Name, Frequency, Type, Folder, Date Created, and Last Modified. Each row has an 'Action' dropdown menu.

Name	Frequency	Type	Folder	Date Created	Last Modified	Action
2024 Giving Tuesday Campaign Total Giving		Transaction	-	8/27/2024 by margie.worrell	8/27/2024 by margie.worrell	Action
2_20_24 Lapsed Donor Report		Constituent	-	2/20/2024 by margie.worrell	6/4/2024 by margie.worrell	Action
Disengaged Ed		Constituent	-	4/25/2024 by margie.worrell	4/25/2024 by margie.worrell	Action
Monthly transaction report	MONTHLY	Transaction	-	4/18/2024 by margie.worrell	4/18/2024 by margie.worrell	Action
Pledge reminder	MONTHLY	Transaction	-	4/18/2024 by margie.worrell	4/18/2024 by margie.worrell	Action

# Demo



# Q & A



# Resources

## Knowledgebase

[Create and Preview Emails](#)

[Edit Email Content](#)

[Edit Administrative Settings for Emails](#)

[Use the AI Content Assistant](#)

[Filter Emails](#)

[Send or Schedule Emails](#)

[Track and Report on Emails](#)

[Best Practices for Email Templates](#)

[Year-end Appeals: Clean Up Your Database](#)

[Year-End Appeals: Segment Your Lists](#)

[Year-End Appeals: Prepare Baseline Reports](#)

## Bloomerang Academy

[Giving Tuesday Strategies](#)

[Giving Tuesday Matching Gifts](#)

[Design Engaging Emails](#)

[Bloomerang + Qgiv: Year-end Fundraising with a Focus on Giving Tuesday](#)

[Bloomerang + Qgiv: Peer-to-Peer Fundraising](#)

## Shared during webinar

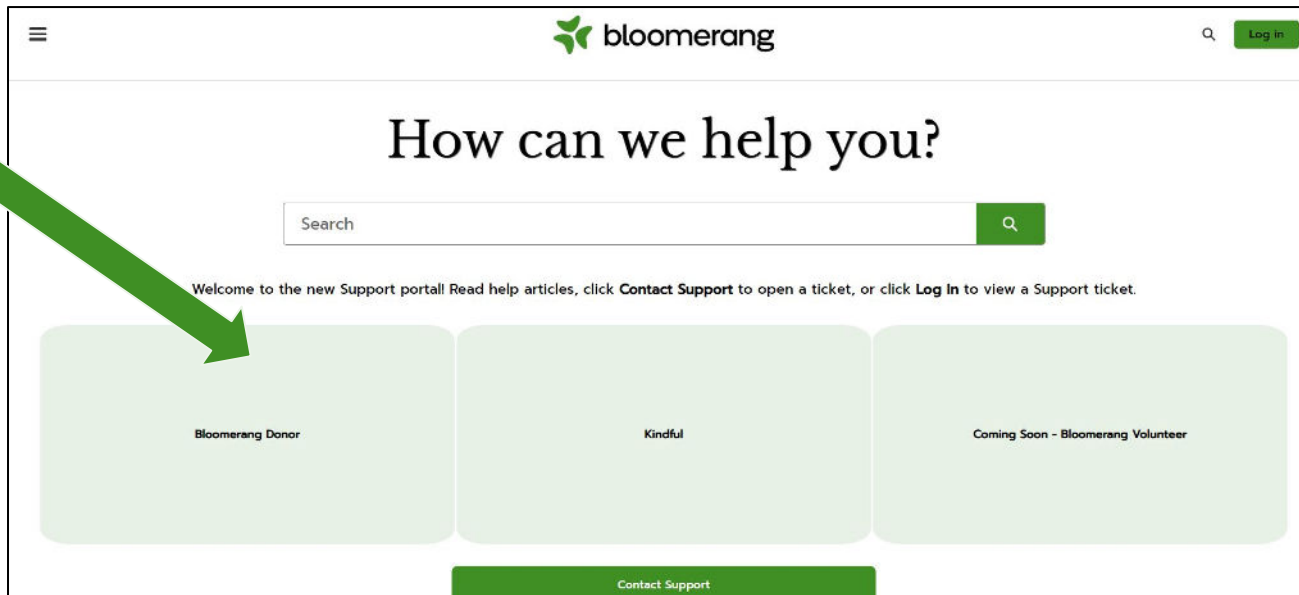
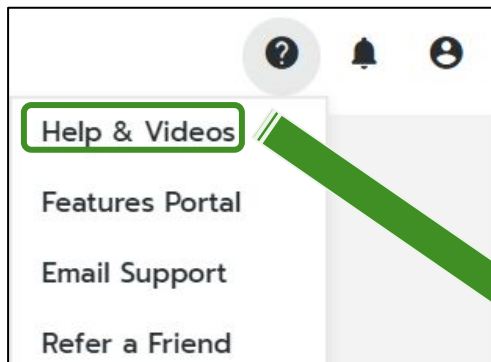
[Take Advantage Of This Sample Giving Tuesday Timeline For Your Nonprofit](#)

[Giving Tuesday Toolkit for Nonprofits](#)



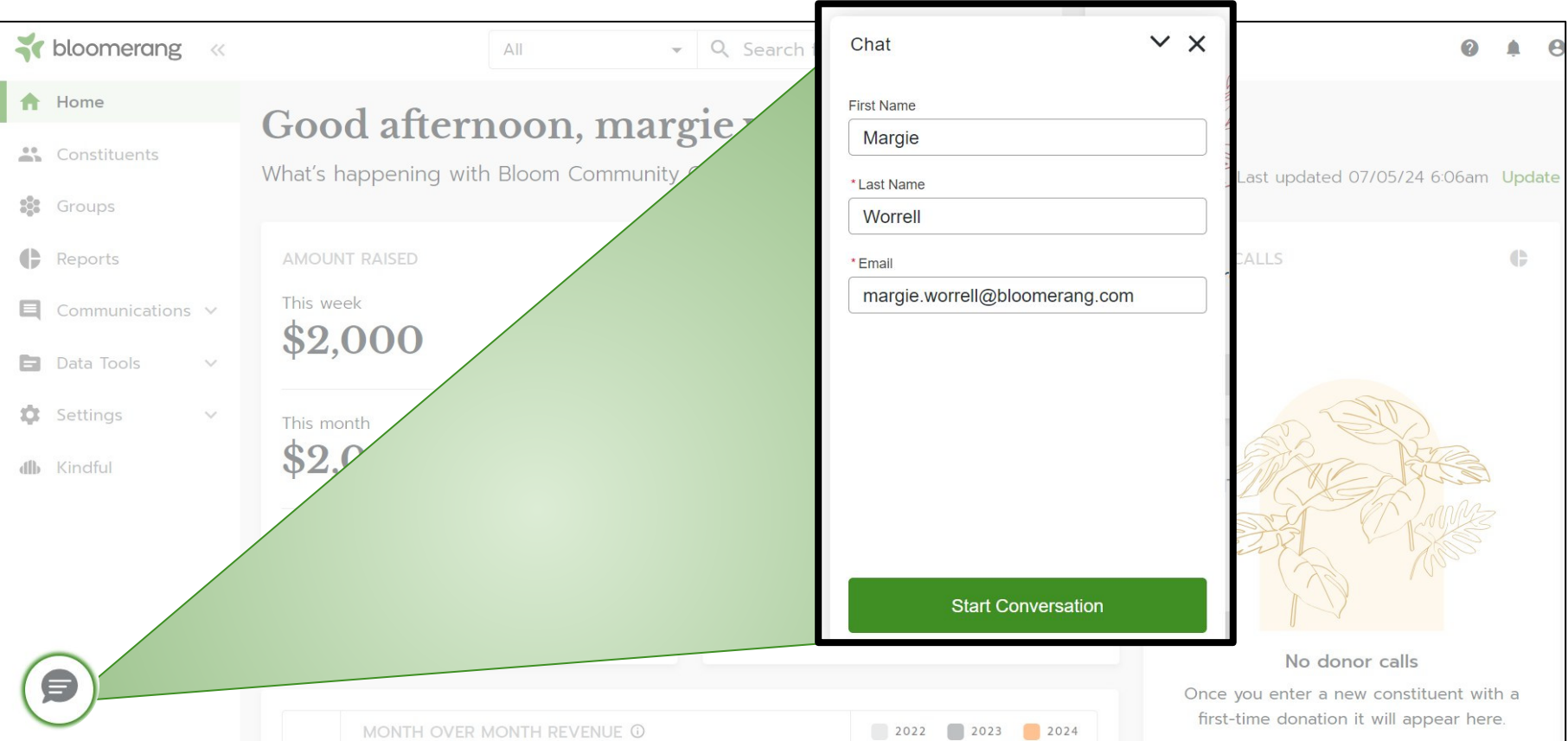
# Resources

## Bloomerang Knowledgebase and Support Portal





# Live Chat to get online assistance immediately



The image shows a screenshot of the Bloomerang dashboard with a chat window overlay. The dashboard includes a sidebar with navigation options: Home, Constituents, Groups, Reports, Communications, Data Tools, Settings, and Kindful. The main content area displays a greeting "Good afternoon, margie" and a section for "AMOUNT RAISED" showing "This week \$2,000" and "This month \$2,000". A search bar and a dropdown menu are visible at the top. The chat window, titled "Chat", contains a form with the following fields: "First Name" (filled with "Margie"), "\*Last Name" (filled with "Worrell"), and "\*Email" (filled with "margie.worrell@bloomerang.com"). A green "Start Conversation" button is at the bottom of the chat window. Below the chat window, there is a section titled "No donor calls" with a note: "Once you enter a new constituent with a first-time donation it will appear here." A decorative illustration of a plant is also present.

Home

Constituents

Groups

Reports

Communications

Data Tools

Settings

Kindful

Good afternoon, margie

What's happening with Bloom Community

AMOUNT RAISED

This week  
**\$2,000**

This month  
**\$2,000**

Search

All

Chat

First Name  
Margie

\*Last Name  
Worrell

\*Email  
margie.worrell@bloomerang.com

Start Conversation

CALLS

No donor calls

Once you enter a new constituent with a first-time donation it will appear here.

MONTH OVER MONTH REVENUE

2022 2023 2024

Last updated 07/05/24 6:06am Update


# Poll



A large, vibrant green Monstera leaf with characteristic holes, positioned in the top-left corner of the slide.

**Thank you for attending!**

Visit our website to see more upcoming  
Bloomerang Academy webinars!

A smaller Monstera leaf, similar to the one in the top-left, positioned in the bottom-right corner of the slide.