BUILDING POWERFUL EMAIL COMMUNICATIONS

For Your Peer-to-Peer Fundraising Campaigns and Events

A HOW-TO GUIDE AND WORKBOOK FOR NONPROFITS

Cathexis PARTNERS

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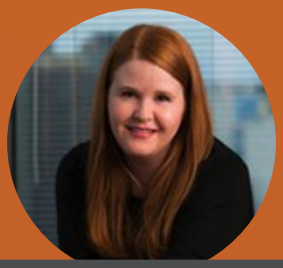

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INTRODUCTION

The success of your peer-to-peer fundraising campaign or event can depend heavily on your email communications. A well-crafted email strategy and plan can help you recruit peer-to-peer participants, coach and motivate your fundraisers, and build long-term relationships.

Why focus on email communications for peer-to-peer fundraising?

When you set up your email communications the right way from the get-go, you will have a solid foundation for all other aspects of your campaign or event. You can then focus more on other activities.

What's in this guide?

In this guide, we've pulled together tips, techniques, and lessons learned from experts at Event 360, Peerworks Consulting, Susan G. Komen, and our own Cathexis Partners team who have worked on countless peer-to-peer campaigns. You'll learn what it takes to build successful email communications for your peer-to-peer fundraising campaigns, including:

1. **Strategy**
2. **Segmentation & Timing**
3. **Content & Calls to Action**
4. **Design & Deliverability**
5. **Execution, Analytics, & Adjustments**

Who's this guide for?

You might be starting the email communications plan for your next peer-to-peer campaign or want to review and refresh your current one. You might be a one-person show or part of a large, national office.

No matter your circumstance, it's important to understand what it takes to build email communications that reach the right people, grab readers' attention, and motivate people to support your organization. So, if you're ready to build highly effective email communications for your peer-to-peer fundraising, you've come to the right place.

Let's get started!

TIP

Many of the examples in this guide focus on peer-to-peer events, but they can be modified for virtual campaigns as well!

1

STRATEGY

When you have a lot to do, taking time to think about strategy might seem like a luxury. But keep in mind that there's no point in sending email messages just to send them. They need a purpose.

Setting a strategy for your email communications establishes the "why" and what you're trying to accomplish. Then you can determine how your email messages will help you get there.

THREE KEY STEPS

Here are three key steps for establishing a strong strategy for your email communications:

1

Articulate the goals of your program.

When your campaign tries to be everything to everyone, it can fall short of fully accomplishing what it needs to. Start by articulating your peer-to-peer campaign goals so you can then create your email communications plan to support those goals.

Here are some things to think about as you articulate your goals:

- What is the **primary purpose** of the program? What must the campaign do to be viewed as successful?
- What **role** does this campaign play in your overall fundraising program? How does it relate to, complement, or compete with your other peer-to-peer fundraising campaigns?
- What do the campaign's goal and role in the fundraising program tell you about what the **tone** of the campaign's communications should be?

2

Understand your audience.

To communicate well, you need to understand the typical person in your target audience, including their demographics, psychographics, interests, and connection to your organization and cause. Be sure to also understand the groups of individuals in your audience so you can develop targeted messages that will inspire and motivate them most effectively. We'll go into more detail about audience segmentation later in this guide, but let's consider a few basics in the context of your strategy:

Consider the types of information that are important for your specific organization to be able to speak in a targeted way to your audience.

For example, look at your audience by their *affinity* with your campaign. This is what that might look like for groups of individuals in a spin-cycling event (in order from weakest to strongest affinity):

Group	Motivation	What they might say
A	The Activity	"I love to spin, and the cycling event is so much fun!"
B	The Group	"My team from work (or school or church) is riding, so I'm riding, too."
C	The Tribe	"My friends and I ride every year. It's just part of what we do."
D	The Cause	"My family and I are riding to celebrate my niece, who is now cancer free."
E	The Organization	"The doctor who helped save my life works at the medical system whose foundation hosts this cycling event."

Another way to look at groups of individuals is their *role* with the campaign or event. For example:

- Top fundraiser
- Board member
- Team captain
- First-time participant
- Survivor

Your peer-to-peer campaign data can also help you communicate with participants in an even more targeted way. Here are some ideas for what insights you can gain from your data to help you segment your audience and target your communications:

- First time or returning participant status
- Fundraising status
- Team affiliation (captain, member, or none)
- Logged into their fundraising center
- Customized their fundraising center
- Sent an email from their fundraising center
- Changed the pre-set fundraising goal

And, some things you might not know, and might need to ask your participants to better understand them:

- What is their affinity to the organization?
- What is their connection with your cause?
- Are they planning to fundraise?
- Would they like to start or join a team?
- What type of team would they like to join?

Here are some things to consider as you think about what your organization needs to know about your audience:

- What is your **primary target audience** for this program?
- What do you know about the primary audience **on average**? This is where broad demographic and psychographic knowledge comes into play.
- What other information might be helpful for your organization to know about **individuals** so you can customize your email communications? For example, a humane society may want to know that someone is a pet owner.
- How can you **collect** other useful information?
- How could you **use** audience information to build more targeted communications?

3 Get clear about what you want your audience to do.

An effective email communications strategy defines what the messages need to ask each audience to do. The messages need to make specific asks and inspire actions that ultimately help you reach your program's goals.

Here is an example of what actions you might try to inspire, and the asks you might make to inspire them, for a walk event:

	ACTIONS			
	Recruit	Activate	Optimize	Retain
ASKS	Will you register? Will you start a team? Will you build a team?	Will you fundraise?	Will you continue fundraising?	Will you participate again next time?

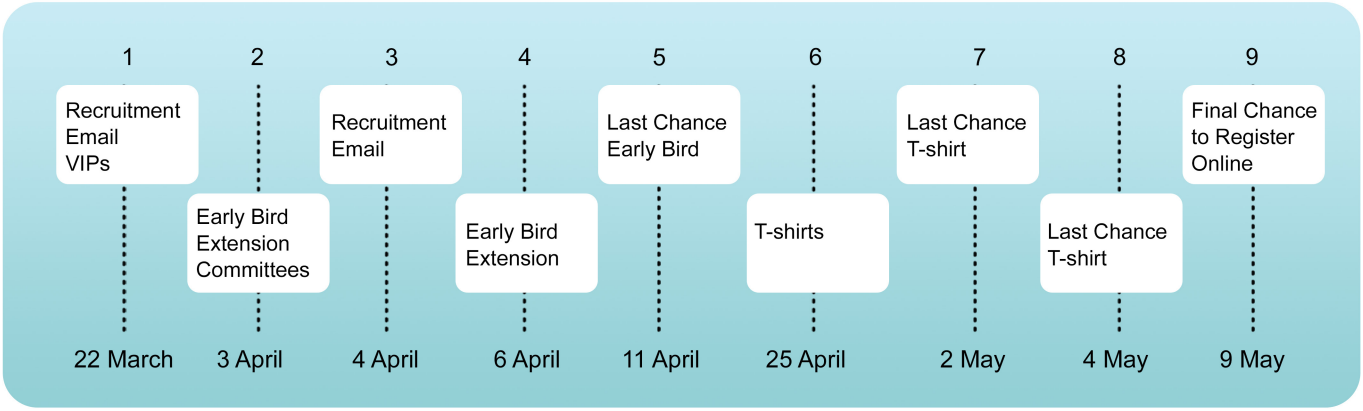
Keep in mind that these communications also need to inform your audience about what they need to do to take action. And, these communications will all be running at the same time, sent to various audiences depending on what stage they're in with your campaign or event.

REAL-WORLD EXAMPLE

Let's look at a real-world example of one nonprofit's email communications plan and schedule that incorporated these three steps:

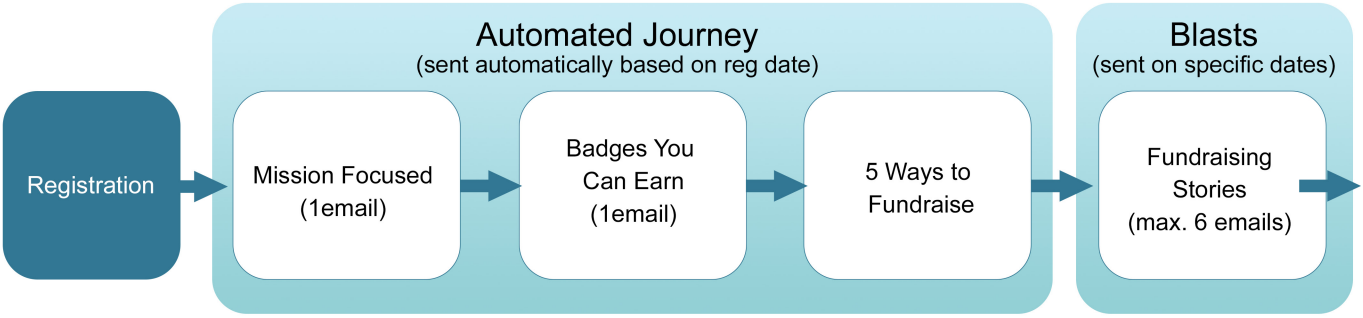
Recruitment email communications strategy

- Engage all past participants from the previous three years.
- Encourage people to register as early as possible (at least five weeks out to maximize potential for fundraising activation and performance).
  - Specific focus on people who typically register at the last minute (event day) and get them to register at least one week out from the event
  - Promote incentives, such as early bird discount and T-shirt
- Provide special VIP treatment for former top fundraisers and volunteer committee members



Fundraising email communications strategy (after registration)

- Make it personal by tailoring the messaging as much as possible by using precise segmentation.
- Make it efficient by automating messages as much as possible (setting up automated email series based on registration date).
- Make it relevant by inspiring with real-time success stories.



WORKSHEET: Strategy

Here are some exercises to help you think about the email communications strategy for your peer-to-peer fundraising campaign or event:

1 CONSIDER YOUR GOALS:

- Articulate the top 1-3 **goals/priorities** for your peer-to-peer fundraising campaign or event.
- List out what your peer-to-peer fundraising campaign or event must **achieve** to be viewed as successful based on those goals and priorities.
- Think about how the program **relates to, complements, or competes** with your other peer-to-peer fundraising campaigns or events and other revenue channels.

2 THINK ABOUT YOUR AUDIENCE:

- Identify the **primary target audience(s)** for your campaign or event.
- Determine what you know about them **"on average"**.
- Determine what other information your organization would like to know about **individual groups** so you can customize your email communications.
- Draft a **plan to collect that information** (through surveys, registration forms, etc.).
- Start to sketch out **how you can use that information** in each stage of the journey: recruit, activate, optimize, retain.

2

SEGMENTATION & TIMING

Once you have your initial strategy in place, it's time to start thinking more deeply about how to segment your audiences and plan the right timing for recruiting, coaching, and fundraising emails.

Let's break down some key ideas.

TIMING

When it comes to timing, there are three big levers you can adjust:

1

Launch

This is about when you launch registration, recruitment, and regular communications with your participants.

2

Frequency

This is about how often you send each type of communication, and it varies by:

- type of event
- participant type
- audience segmentation

3

Shift

This focuses on when to shift communications from recruitment to participant engagement.

Let's look first at how timing varies by type of event. And, for our purposes, let's break down events by four event types:

FUNDRAISING EVENTS
Fundraising is the number one focus of the event. The audience is there primarily because they care about the cause. These events are often 5K runs/walks, bike rides, or any activity that just about anyone can do.

ACTIVITY-BASED EVENTS
These events are centered around a physical event that's often challenging. Participants don't necessarily have a strong connection to the cause – they're mostly in it for the fun of the event. Examples of these types of events are races, mud runs, and obstacle courses.

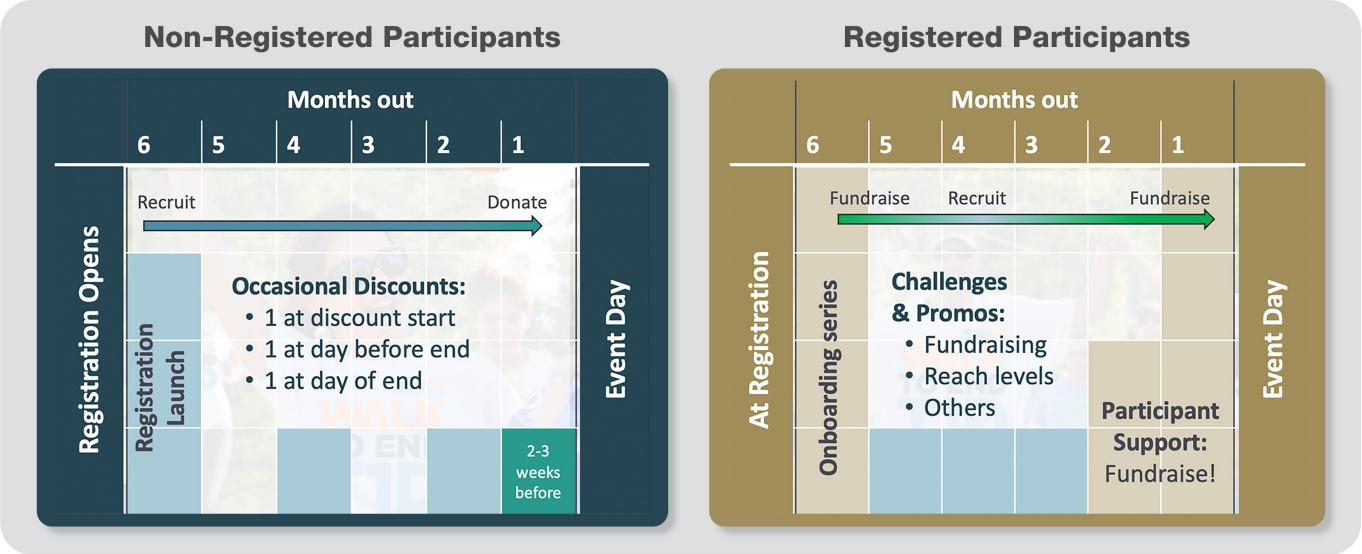
AWARENESS EVENTS
These events require a low commitment, are not difficult physically, and require no fundraising minimum. The goal is typically high visibility of the cause with many participants. Examples of these types of events are large walks, festivals, and even social media events.

HIGH COMMITMENT EVENTS
These events require a high fundraising commitment and often a high physical commitment. Most participants have a strong connection with the cause and tend to return year after year. Examples of these events are multi-day walks or bike rides, marathons, and cross-country journeys.

And now let's look at how timing levers vary for each event type:

For fundraising events:

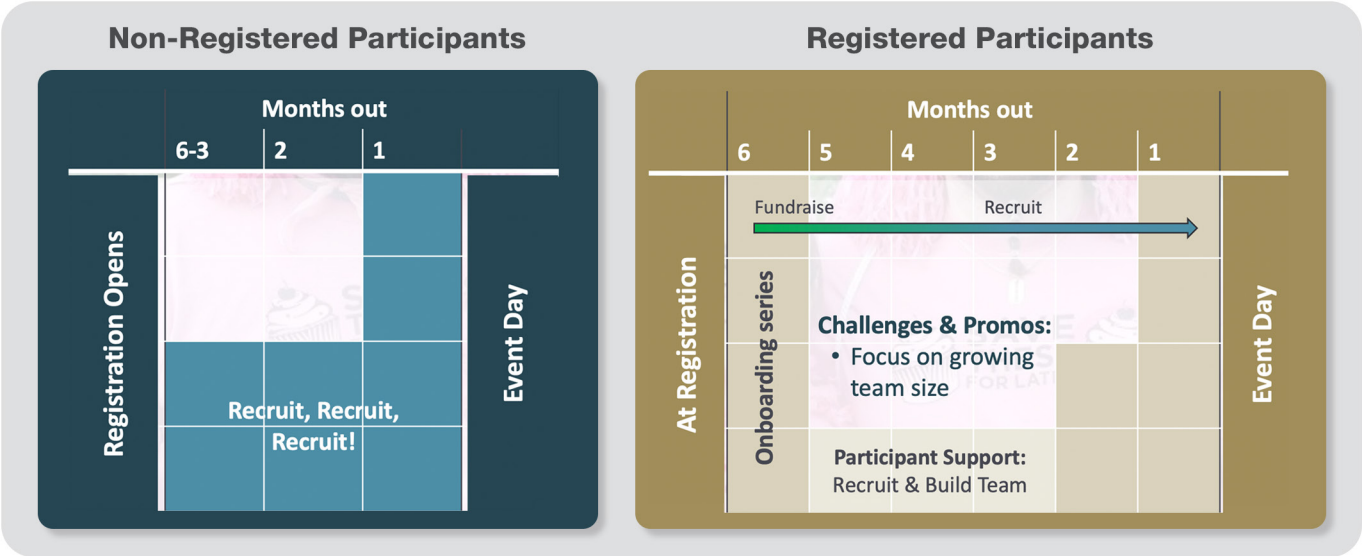
- **Launch:** Launch recruitment communications about six months out from the event to people who are not registered.
- **Frequency:**
  - For recruitment emails, start sending communications about every other month. You can increase this frequency around times you might be running special discounts or other promotions.
  - When people register, start an immediate on-boarding series to welcome them and give them tools and information to get them fundraising right away. Communicate with them about once per month to give them key tools and information. About two months before the event, increase communications to about two times per month. These communications should encourage participants to raise more dollars and recruit others to participate in team fundraising. In the final two to three weeks, increase this to once per week to ensure they have the information they need for the event and to encourage final fundraising pushes.
- **Shift:** About two to three weeks out, begin to shift focus away from recruiting and toward participant engagement and encouragement (anyone registering after this time will not have much time left to fundraise). Consider sending one final "registration is closing" message around this time, and ask if non-registrants might want to make a donation if they do not want to register.



For awareness events:

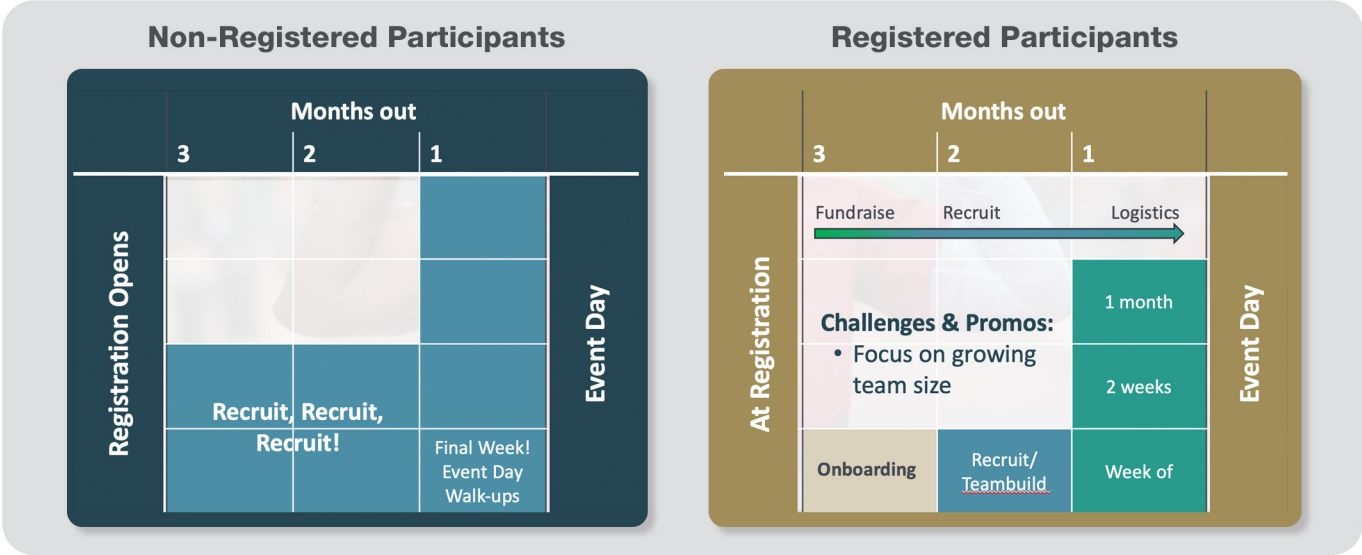
- **Launch:** For this type of event, plan to launch closer to the event – about three months out. Any earlier, and they might sign up but then lose interest by the time of the event.
- **Frequency:** For recruitment emails, send communications about once per month, increasing to twice per month closer to the event. As with fundraising events, start an immediate on-boarding series with a welcome message and initial details. Then, begin asking them to recruit their friends and family to participate. Increase the frequency of these communications about one month before the event.

- **Shift:** In this type of event, there really is not a shift; continue to recruit participants up until the day of the event.



For activity-based events:

- **Launch:** Because people tend to be focused more on the activity than the cause for this type of event, they often register at the last minute. So, as with awareness events, plan to launch about three months before the event.
- **Frequency:**
  - While you might include a soft fundraising ask in recruiting email communications, the purpose of these communications is primarily to recruit. Send communications about once per month, increasing to twice per month closer to the event.
  - For participants, send them an onboarding email series with key information, and then ask them to recruit others to participate – but keep the number and frequency of communications to a minimum. As you get closer to the event, you can step up the email frequency to share details and reminders about the event.
- **Shift:** Similar to awareness events, continue to recruit participants up until the day of the event.

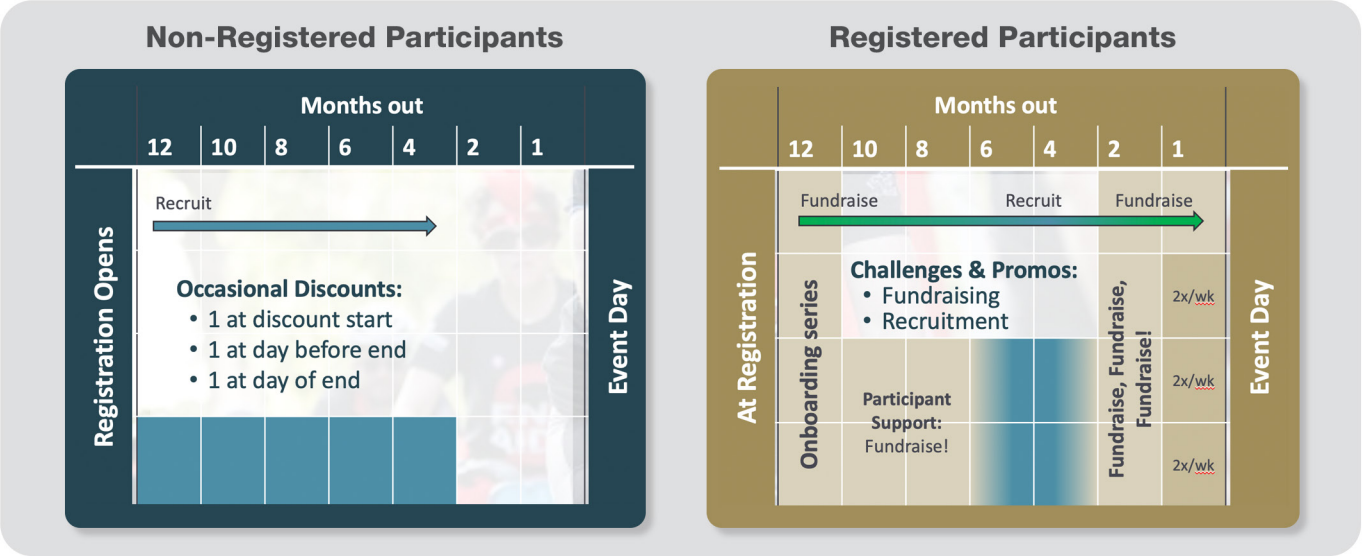


TIP

If a major event takes place in your community or even worldwide, press pause on your email communications plan and make sure that sending communications will not seem inappropriate at that time.

For high-commitment events:

- **Launch:** If possible, launch this event immediately after the previous event ends. This will catch participants while they're still enthusiastic from the past event and gives them time to build their fundraising and train for the next event.
- **Frequency:**
  - Send about one email per month.
  - Send an onboarding email series to registrants to get them fundraising right away while their commitment is fresh. Then, send monthly emails to encourage them to fundraise and recruit other participants. Around six to nine months before the event, increase communication frequency to about two times per month. One to two months out, increase to about one to two times per week.
- **Shift:** High-commitment events will not likely have last-minute registrants, so you can shift focus away from recruiting at about one month before the event so you can focus most of your time on engaging participants.



A NOTE ABOUT DEADLINES

Frequency for email communications will change around deadlines for registration discounts or team building and fundraising challenges. For challenges, plan to send an email when it starts, another one week before the deadline, and one or two in the last days before the deadline. For discounts, send one communication when the discount period starts, another one day before the deadline, and a final one the day of the deadline.

SEGMENTATION

Segmentation is about talking to different audiences in different ways, depending on who they are and how they might be interested in your cause. Email communications are most effective when you personalize the message, information, and asks based on what you know about the audience.

Segmentation is different for the purposes of recruitment versus participant engagement. Here are some of aspects you can segment on for the two different purposes:

Recruitment	Engagement
Connection to organization – Have they given, raised funds for, or been an advocate for your organization? **Connection to cause** – Are they personally connected to the cause, participating because of a friend or family member, or are they just in it for the activity? **Location** – Where do they live? (This will tell you if they must travel to your event versus if they are local.) **List source** – How did you get their contact information? (Depending on how you got it, they might or might not be familiar with your organization or your event.) **Interactions with communications** – Are they opening and reading your emails?	**Fundraising** – What is their fundraising history and current fundraising status? **Connection to event** – Are they new to your event, a second-time participant, or a loyal repeat participant? **Connection to cause** – Are they personally connected to the cause, participating because of a friend or family member, or are they just in it for the activity? **Current team status** – Are they a team captain, team member, or individual? **Other** – What is their participation type, donor status, age, location, (or other information you might have asked them at registration)?

TIP

Just because you can segment, doesn't mean you should. Be sure to have a specific purpose for communicating with different segments of your audience.

With these segmentations in mind, here are some that are often most useful for each event type:

Fundraising	Awareness	Activity-based	High Commitment
Current fundraising	Participation type	Team status	Participation history
Participation history	Team status	Connection to cause/list source	Current fundraising
Historical fundraising	Participation history		Team status
Team status			Historical fundraising

SEGMENTATION IS ABOUT MORE THAN JUST CONTENT

Keep in mind that segmentation is about more than just what message you send to which audience. It's also about timing and frequency. For example, you would send emails less frequently to someone who likely only wants to sign up for a local 5K run than someone with a deep connection to your organization's cause. Team captains might get a different email series with more emails than an individual participant.

WORKSHEET: Segmentation and timing

Here are a list of questions and exercises to help you put the ideas of segmentation and timing into practice:

1 **Which of the four event types is your event: fundraising, awareness, activity-based, or high-commitment?**

2 **Based on your event type, what is the overall timing for your email communications schedule?**

3 **What are the possible audience segments you have data for and could use?**

4 **Which of those audience segments would make the most sense for you to use?**

5 **Start building your email communications calendar. An easy way to do this is to create a spreadsheet with:**

- one row per scheduled communication
- columns for timing, audience, message, segmentation, and notes
- one tab for recruitment communications and one for participant communications

Date	Email	Audience	Topics	Segmentation/ Conditional	Notes
1-Sep	Fundraising 1	Participants Raised $0	Top fundraising tips, links to resources	Past participation, past fundraising	Out for review

3

CONTENT

You know your audiences. Now it's time to focus on what you want them to do. It's time to inspire action across the four areas of their journey with your event:

1. Recruiting
2. Activation
3. Optimization
4. Retention

So, let's turn our attention to making the ask and inspiring action with compelling content.

CLEAR CALLS TO ACTION (CTAS)

For each area of your audience journey, think about what you want your audience to do and what your "working" CTA will be (hint: your working CTA should be very simple and direct and get to the core of what you need to accomplish. You can wordsmith later). Here are some examples:

	Goal	Working CTA
Recruit	New people to join us	Will you join us?
	Returning people to join again	Will you join us again?
	Start a team	Will you start a team?
	Build a team	Will you build a team?
Activate	Inspire people to fundraise	Will you start fundraising?
	Start their team's fundraising	Will you jump-start your team's fundraising?
Optimize	Encourage people to keep fundraising	Will you keep fundraising?
	Teach people to fundraise more	Will you ask more often? Will you ask for larger donations?
Retain	Return	Will you come again next year?
	Bring their friends	Will you start a team?

You might be asking "Why establish working CTAs?" It's because these CTAs will help inform the following items:

- Subject line
- Preview content
- Message content
- Links and buttons
- The "P.S." message

Essentially, this goes back to starting with a strategy for your email messages. Mapping out your CTAs in advance will make your email message development much more efficient and effective.

COMPELLING CONTENT

Now let's talk about developing content that grabs the readers' attention and inspires the action you want your audiences to take. Here are some tips:

Subject line

This is the one shot you have to get someone to open your email.

- Keep subject lines concise so that the full subject line will show up in most email programs (about 40 characters maximum).
- Make it a summary of the email content.
- Optionally, pique the reader's curiosity by including an offer, teasing content, or presenting a deadline.

Example subject line: This is the year to help beat [mission]

Preview Copy

This is the text on the line after the subject line of an email notification on your mobile device or even some desktops. Use this space to make the reader want to read more. For example:

- It can be a literal continuation of the subject line so that you have more space to extend your subject line's message.
- Another option: Remind readers of why they're participating.
- Make the message more personal by adding the reader's name in this space.

Example preview copy: Here's how you can help.

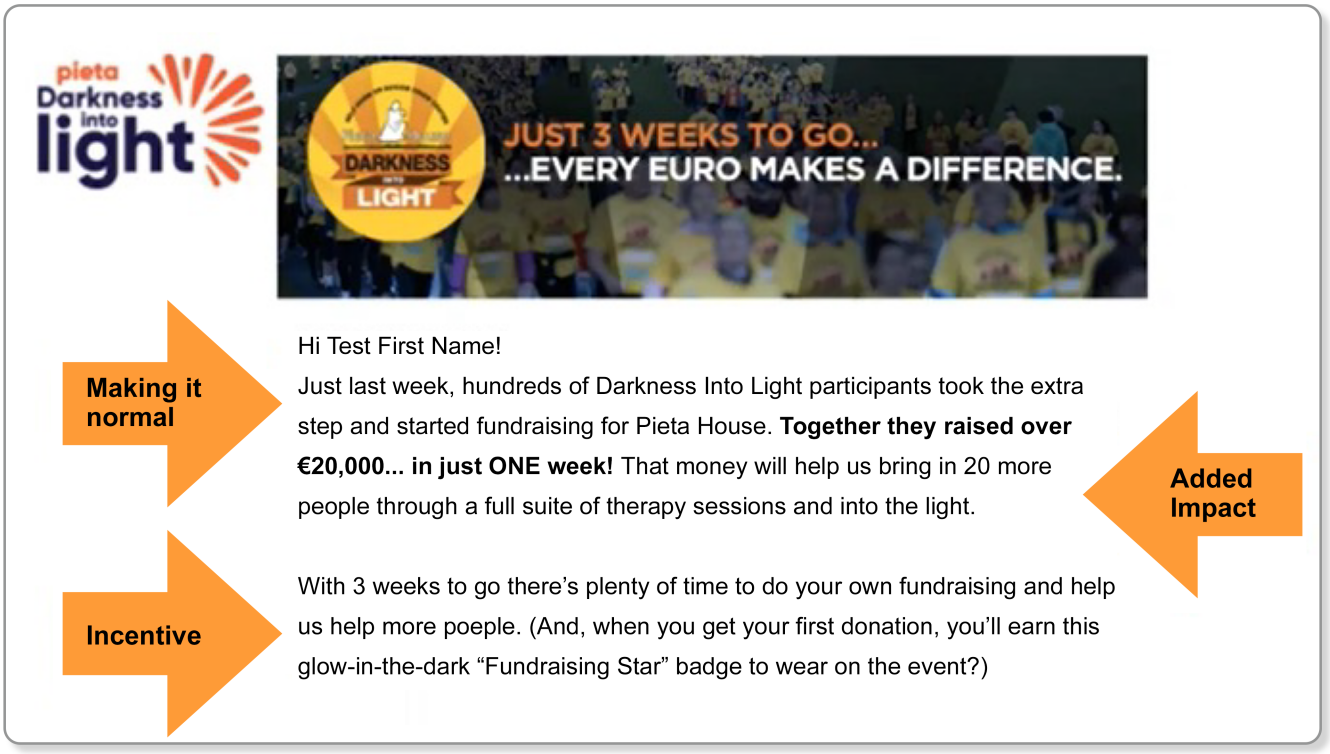
Try to keep preview copy short and concise. While some email clients support up to 140 characters, others are limited to 40, so plan for no more than 40 characters.

Message Content

Now that you have your readers' attention, it's time to start inspiring them to take action. While your specific message will vary depending on your type of event and your audience, here are some effective approaches:

- Explain why you're writing to them and why they might want to take action. Using powerful stats and stories can demonstrate your mission impact and bring your mission to life.
- Add impact by suggesting that taking action will help more than just them.
- "Normalize" the action to show that others like them have participated.
- Demonstrate how they can participate. This be accomplished through the use of stats, testimonials (written, video, or audio) from other fundraisers or participants, and fundraising and team captain toolkits.
- Provide an incentive for them to take action.

Here is an example of some of these content strategies in action:



PRACTICAL EXERCISE: Content

Map out your message strategy for each stage (Recruit, Activate, Optimize, and Retain) for your next campaign or event. For the “Why or How?” column, start to list the stats, testimonials, and other content you can use to explain why and how the audience can and should participate. Here is a sample template you can use:

Audience Segment	What We Need to Accomplish	"Why" or "How"?	Working CTA	Priority of the Message	Subject & Preview Content	Links & Buttons	P.S.

4

DESIGN & DELIVERABILITY

Strong design and deliverability help your messages reach your readers and grab their attention. Here are some key ideas for these two aspects of email communications for your peer-to-peer fundraising.

DESIGN

Email design comes down to one key goal: getting your readers' attention. Let's look at some best practices for key aspects of email design:

Enticing Content – To create content that appeals to readers, concentrate on:

- Storytelling – Content and design go hand-in-hand. Use imagery to help tell your story and break up text.
- Call to action – Make sure your CTA stands out. You can do this visually by:
  - Placing it in a highly visible location in your email
  - Designing it with high contrast colors so it visually "pops"
  - Allowing plenty of space around it to give it greater impact
  - Making sure it's big enough for fingers to click on it from mobile devices
- Simplicity – Keeping your email imagery and text short and simple will make it more impactful.

Brand Guidelines– Your brand guidelines will help ensure your design presents a consistent identity for your event or campaign.

Some elements that can help you stay on brand include:

- Image styles (for example, black and white vs. color; photos vs. graphics)
- Fonts (the choice and use of type styles)
- Tone of voice (for example, serious vs. playful)
- Color treatment (for example, the specific colors and amount of color used)

The following items should carry through consistently on all design items for your campaign or event:

- ✓ Colors
- ✓ Fonts
- ✓ Heading styles
- ✓ Button styles
- ✓ Line treatments
- ✓ Footer styles

General design – Here are some general design tips to help you create email communications with maximum impact:

- Focus on the header – The top 300 pixels of your email are the most impactful for grabbing your readers' attention. Your header should:
  - Include your campaign or event name and logo.
  - Feature a powerful headline.
  - Offer an incentive (such as "read more to learn…") to read on.
  - Include a call to action (if possible).
  - Use alt text to make it easier for email recipients using screen readers to read the email.
- Use space – Space gives your images and text breathing room that helps the reader focus more on each element in your email message. Use space liberally to give your entire email more overall impact.
- Don't forget the footer – Because it comes at the end of the email, the footer is often an afterthought in design. But remember that you can use the footer to emphasize your CTA, promote additional content such as your blog, or include special offers or useful links. Use your design elements, including space, text alignment, and line treatment to enhance the design of this area of your email communications.

A NOTE ABOUT USING MOTION IN EMAILS

Motion can be a fun, attention-grabbing element in email communications. However, videos are not supported in email clients, so use a thumbnail image that links to video. For animations, use animated gifs, but keep them very simple or the file size might grow too large to be practical.

Responsive design – While statistics vary, most sources say that well over half of emails are opened/read on a mobile device. So, designing with mobile devices in mind is critically important. Some tips:

- Use a standard font, and keep font size large – 14-point type or larger.
- Use ample space between text and images so they are not too crowded.
- Use clear, large, and well-spaced CTAs.
- Use small snippets of text.
- Center-align your headings when possible, and keep other text left-aligned.
- Be sure that your email text looks good without images, as some email clients might block images.

This email from the Susan G. Komen 3-Day event demonstrates many of the design best practices highlighted in this guide.

susan G. Komen 3-Day

Presented by BANK OF AMERICA

THE3DAY.ORG

Susan G. Komen® is planning a triumphant return to a full slate of live Susan G. Komen 3-Day events in 2022 and registration is now open! The 2022 series includes our most popular locations, New England (Boston), Chicago, Dallas/Fort Worth, and San Diego!

TODAY ONLY, September 30: Registration for the 2022 3-Day Series is **free**! No code required. Tell your friends and family to register by midnight PT tonight for NO fee.

2022 Susan G. Komen 3-Day Series

New England
August 26 – August 28, 2022
Hotel Event

Chicago
September 16 – September 18, 2022
Hotel Event

Dallas/Fort Worth
November 4 – November 6, 2022
Hotel Event

San Diego
November 18 – November 20, 2022
Outdoor Camp Event

REGISTER TODAY

It's going to be an incredible opportunity for you to continue your 3-Day journey and reconnect with old friends who share your passion and commitment in the fight against breast cancer.

Thank you so much for your past support. We hope you'll be able to walk with us again in 2022!

Your Susan G. Komen 3-Day Team

P.S. There's still time to walk in the 2021 San Diego 3-Day or join 3-Day Nation! Visit The3Day.org to register now.

KOMEN IMPACT FACT: Since its founding in 1982, Komen has funded more than $1.1 billion in research and provided more than $2.3 billion in funding to support people facing breast cancer today through advocacy and a suite of patient support services helping millions of people in more than 60 countries worldwide.

The3Day.org

Please do not reply to this email. Click here to contact the Susan G. Komen 3-Day® coaches. Or respond directly to the participant who sent you this email. Click here to view this message as HTML in your browser. Click here to change your email preferences.

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DELIVERABILITY

Your email communications won't do any good if they don't reach your audience. While deliverability considerations could fill an entire guide on their own, here are some things to consider:

Test your email messages.

There are two key aspects of the email environment: a) what email tool you're using to send your email (such as Classy, Emma, MailChimp, or TeamRaiser), and b) the email client and platform the reader is using to receive and view the email (such as Gmail or Outlook email clients; and Android or Apple operating systems).

Be sure to test your email messages on top email clients and operating systems to ensure that the emails are getting through and that they display the way you intend them to look. There are two ways to accomplish this:

- Send test emails to people on your staff who check them on various email clients and devices.
- Use a tool, such as Email on Acid, MailMonitor, or Validity, to check your emails. (This is a much more efficient approach.)

Remember accessibility.

To ensure visually impaired readers can receive and read your email messages, be sure to design for accessibility. For example:

- Choose clear, simple fonts.
- Include ample space around images and text.
- Maintain a logical reading structure, as screen reading tools read from left to right.

Check your deliverability stats.

Complete a periodic check of your email deliverability rates and hard/soft bounces to get a better picture of how well your emails are doing at reaching your audience. You can use one of the tools mentioned previously (Email on Acid, MailMonitor, Validity, or many others) to check your deliverability statistics.

PRACTICAL EXERCISE: Design & Deliverability

Here are some things you can do today to improve your email design and deliverability:

1

Gather inspiration.
Create an email folder (or Pinterest board) and start collecting sample email communications that catch your attention. Use these email messages for inspiration as you plan your own emails.

2

Gather images.
Create an electronic folder and begin saving stock images and images from past events, campaigns, and organizational activities that you can use in your email communications.

3

Outline your messages.
Begin to outline email messages for your next campaign or event using the message map you started in the previous section of this guide. Then, consider what text and images you will use for each message.

4

Check your deliverability stats.
Take this time to use one of the many email deliverability tools on the market today to review your email deliverability stats and determine what percentage of your emails are not being delivered. Look into the details and consider what you can do to improve deliverability through your email design and/or list cleanup.

5

EXECUTION, ANALYTICS, & ADJUSTMENTS

You've made your email communications plan. You've segmented your audience, built compelling content, and prepared to design emails that will grab your readers' attention. Now it's time to jump in and start executing on your plan.

In this section, we'll talk about what you need to bring your email communications to life and how to analyze results so you can continue to make improvements.

EXECUTING YOUR EMAIL COMMUNICATIONS PLAN

There are three main technology functions you will need to execute on your email communications plan. These are: the ability to build messages, the ability to send messages, and the ability to report on email message performance.

While functionality will vary depending on the software platform you use, here is the typical functionality you will need to employ:

Email building:

- Some type of drag-and-drop visual editing environment
- Additional design capabilities (often using CSS, HTML, or JavaScript)
- Content personalization/customization

TIP

When building email messages, be sure to make a backup copy of every message (as well as images, web pages, social media content, and other campaign assets) in a shared file. This ensures that others in your organization can access the messages if needed.

Email sending:

- Audience creation, including segmentation and conditionalized content
- The ability to schedule email sends or send messages in real time
- Set up auto-responder emails (system-generated emails)

TIP

As much as possible, use auto-responder email messages and schedule email message sends in advance. This will help to ensure you send the right messages to the right audiences at the right time with minimal manual work.

Email reporting:

- Tracking of email open, click-through, action taken rates, etc.
- Hard and soft bounce counts/rates

With this functionality, you should have all that you need to execute on your email communications plan.

ANALYZING THE PERFORMANCE OF YOUR EMAIL COMMUNICATIONS

To make sure your email messages are performing as well as possible, it's critically important to set up and analyze email communications reports for your events and campaigns. Here are a few ideas to get you started:

Decide what to track.

Determine the key performance metrics for your email communications. These will typically include click-through and unsubscribe rates. However, they also include action taken rates, such as:

- How many people registered for the campaign or event
- How many registered, but did not raise funds
- How many people raised funds, and how much did they raise, on average
- Did certain groups raise more than others

Determine your projected performance targets.

You can use past performance to help you estimate what your target metrics should be. If you don't have previous metrics, or if you want additional data points, another way to determine projected targets is to use industry benchmarks.

Multiple companies and organizations that serve the nonprofit sector produce regular industry benchmark studies that provide helpful insights, including email marketing benchmarks and peer-to-peer fundraising benchmarks. Here are just a few:

- Blackbaud's Peer-to-Peer Fundraising study
- Classy's The State of Modern Philanthropy report
- M + R Benchmarks research
- The Peer-to-Peer Forum's annual Peer-to-Peer Fundraising 30 study
- Tiltify's The State of Digital Fundraising Programs: 2021 report

TIP

As you determine your performance targets, keep in mind what your budget and staffing will allow. Be sure to set targets that are realistic for your organization.

Allocate times for measurement and analysis.

The benefits of tracking and analyzing your results is threefold. It can help you:

- During the campaign – Determine how your event is performing so you can make improvements throughout the campaign.
- After the campaign – Evaluate how your event performed so you can determine if it met expectations and, if not, then why?
- Before the next campaign – Use metrics from this year to determine what you might do differently as you plan the next campaign or event, such as changes to email communications or tweaks to what you measure and analyze along the way.

A good way to think about what to measure and when, at a minimum, is to think back to the key actions you're trying to inspire your audiences to take:

1

Recruit

How many new registrations are you getting/did you get?

2

Activate

What percentage of your audience raised funds?

3

Optimize

Which groups of your audience raised more funds than others?

4

Retain

How many people are returning registrants?

Now, set up reports to track your results. And be sure to set aside time during and after the campaign or event to analyze your results compared with your performance targets and industry benchmarks.

Consider if it's time for a change.

As you analyze your results, think about opportunities for improvement. Here are some things to consider:

- Communications – Are your recruitment and fundraising results falling short of your performance targets? Maybe you can make small (or even larger) tweaks to improve them.

- Campaign type – Does it seem like your campaign or event has reached the limit of what it can do? Maybe it's time to add a new virtual campaign? Or, if you're running a virtual campaign, what about adding a physical event?
- Software platform – Is your platform holding you back? Maybe your participants are leaving part-way through the registration process. Perhaps your staff is having trouble managing email communications and setting up reports. Or maybe your platform doesn't work well with your other software systems. If any of this is the case, it might be time for a change.

TIP

The Nonprofit Toolkit for Selecting Peer-to-Peer Fundraising Software includes a how-to guide and interactive online tool to help you find the right software for your nonprofit.

PRACTICAL EXERCISE: Pulling it all together

Now that you've made it to the end of this guide, here is one last exercise to help you move forward:

1

Build your emails.
Begin building the email messages that correspond with your plan and your calendar. Set up any autoresponders and schedule email sends in advance, when possible.

2

Review industry benchmark reports.
Take a look at some of the industry benchmark reports listed in this guide. They include valuable insights to help you determine what metrics you should be tracking and what your performance targets might be.

3

Create reports.
Take the time to set up reports in your peer-to-peer fundraising software platform that track the key metrics you've defined. Be sure to share the reports with others at your organization.

4

Schedule time for report reviews.
Set aside specific dates and times to review reports during and after your campaign or event. Plan to use the time to decide how to incorporate the insights you gain into your current and future campaign or event.

TIP

Want to learn more about email communications for your peer-to-peer fundraising? Watch the five-session, step-by-step on-demand workshop series, Peer-to-Peer World Email Communications Workshop.

TAKE YOUR PEER-TO-PEER FUNDRAISING TO NEW HEIGHTS

There's virtually no limit to the number of ways you can use the peer-to-peer model to raise funds and engage supporters. With a little inspiration, some time, and the right peer-to-peer tools for the job, you can take your campaigns in exciting new directions.

At Cathexis Partners, we help nonprofits like yours to implement and use technology to raise funds and spread the word about their mission affordably and effectively. Our services include peer-to-peer fundraising strategy, graphic design, and software implementation.

Contact us today, and let's talk about how you can take your peer-to-peer fundraising to new heights.

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