CRM & Email Mastery for Nonprofits

November 2024
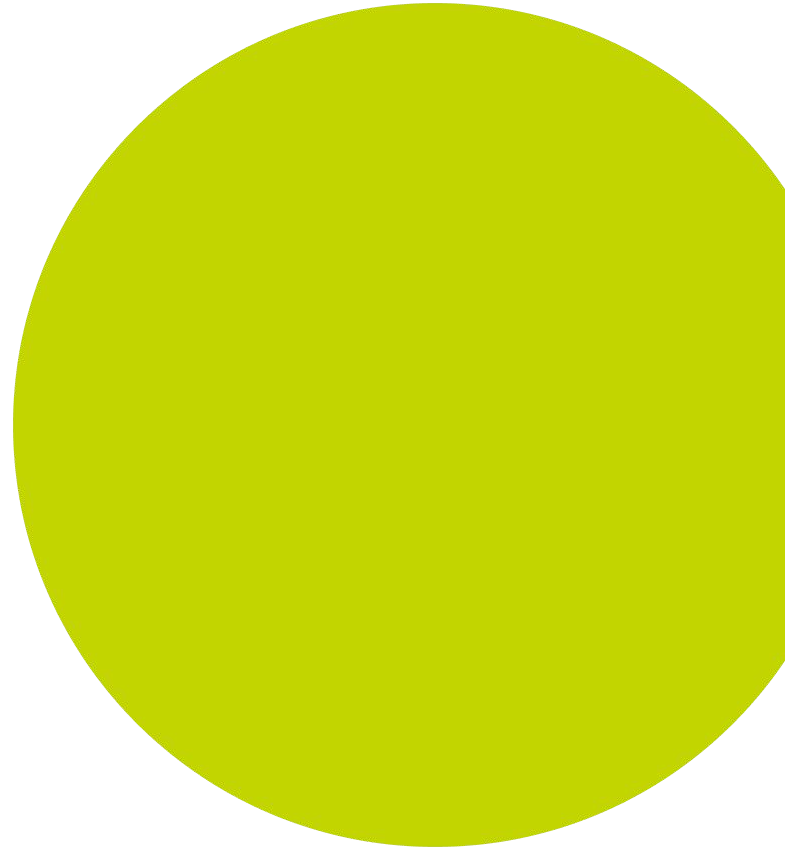
mhp•si

Lexie Lybrand

ABOUT

Marketing Analytics degree from Louisiana Tech University.

Started as a content producer.

Currently a **Marketing Automation Specialist** here in Little Rock.

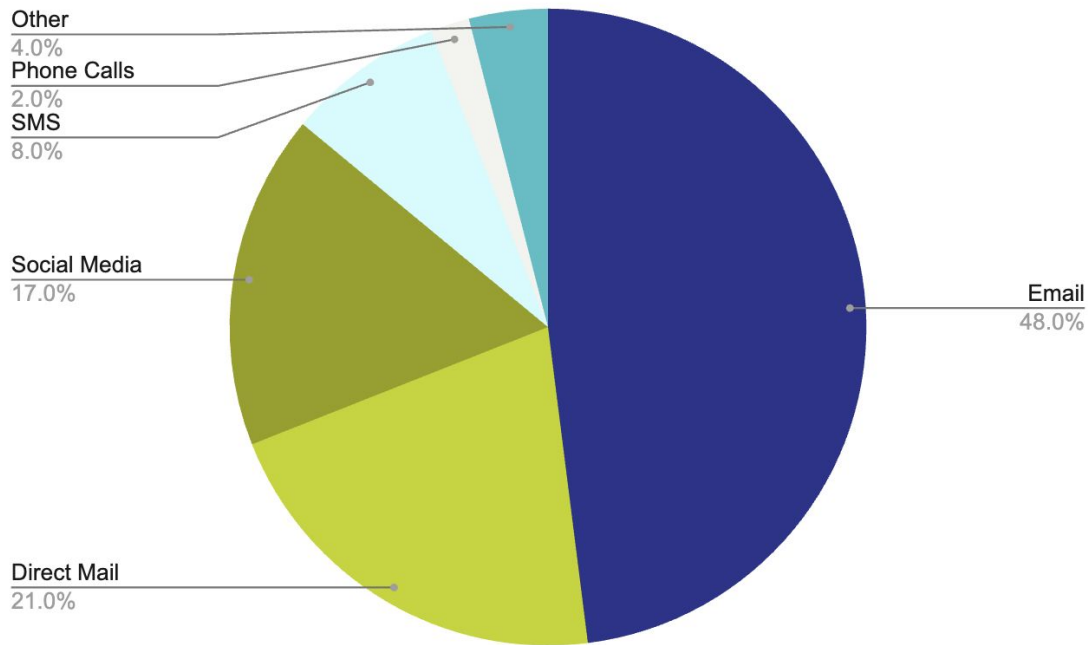I'm happy anytime I'm biking and being out on Lake Ouachita!

Why should you care about email marketing?

mhp•si

77%

of people from all age groups prefer email marketing over other channels.

What is donors' preferred method of hearing updates and appeals from organizations?

mhp·si

Other
4.0%
Phone Calls
2.0%
SMS
8.0%

Social Media
17.0%

Direct Mail
21.0%

Email
48.0%

Why might donors prefer email? 📬

- Donors can read and respond on *their* schedule!

- Email bring the mission to life.

- Creates a steady, friendly flow of updates without the need for calls or snail mail.

- Easy to choose frequency, opt out, or read at their own pace.

Why might YOU prefer email?

- **Cost-Effective** → high ROI with minimal investment.

- **Personalized Outreach** → craft messages that resonate.

- **Measurable Results** → track engagement and refine strategies.

- **Low Barrier of Entry** → drag-and-drop makes building marketing emails easier than ever.

mhp•si

Popular Email Marketing Services

Platform	Features	Starting Price
Mailchimp	Email campaigns, automation, audience segmentation, analytics.	$20
Active Campaign	Email marketing, automation, CRM, sales automation.	$15
Constant Contact	Email marketing, templates, list management, reporting.	$12
MailerLite	Email marketing, automation, landing pages, website builder.	FREE

Tip #1

Build a Quality (& Compliant) Email List

Make sure you're collecting & recording consent.

Include a visible unsubscribe link in every email.

Include a link to your privacy policy in your emails.

Remove and manage unengaged contacts.

Tip #2

Define & Segment Your Audience

By Status: donors, volunteers, beneficiaries, partners

By Giving History: one-time, monthly, high-value

By Interests & Preferences: specific programs, volunteer opportunities, events

By Location: local, regional, national, international

By Engagement Level: new subscribers, active supporters, lapsed donors.

Tip #3
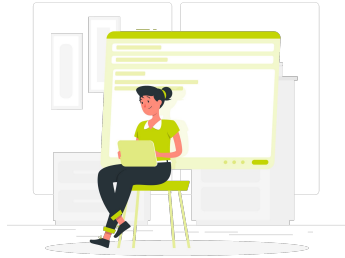
Craft Subject Lines That Drive Action

Shorter subject lines tend to perform better (30 to 50 characters, 5 to 7 words).

Avoid words like *"claim"*, *"free"*, and *"urgent"*.

Personalized subject lines tend to perform better.

A/B testing.

[37 Subject Lines for Fundraising](#)

Tip #4

Provide Valuable
Content

Consumers like to see **relevant and engaging content.** Share content that is informative and relevant to your audience.

Test different types of content to see what your audience engages with most *(i.e photos, videos, blogs, etc).*

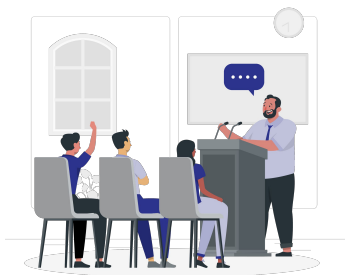Tell a story.

24 Content Ideas for Non-Profit Newsletters.
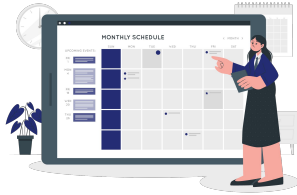
Tip #5

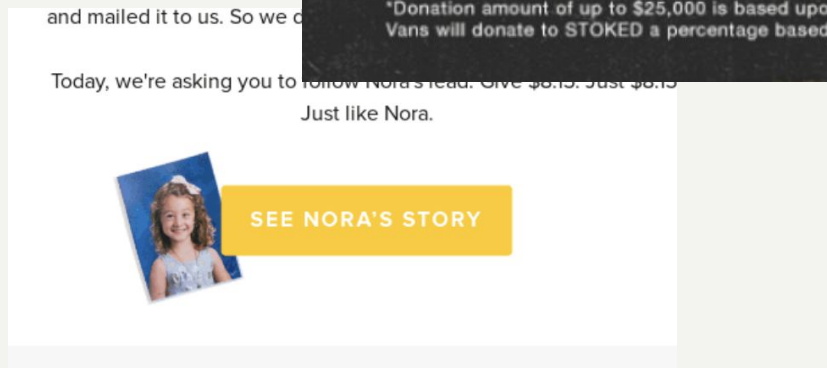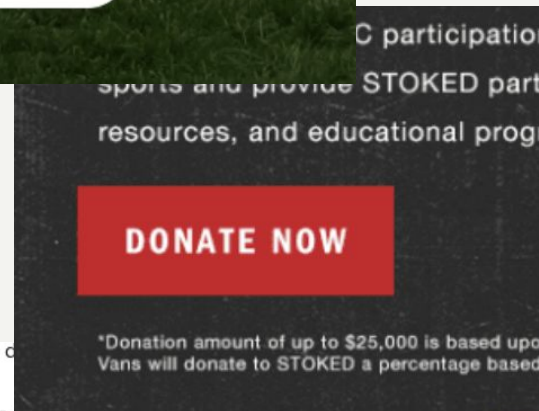## Send Smarter, Not Harder!
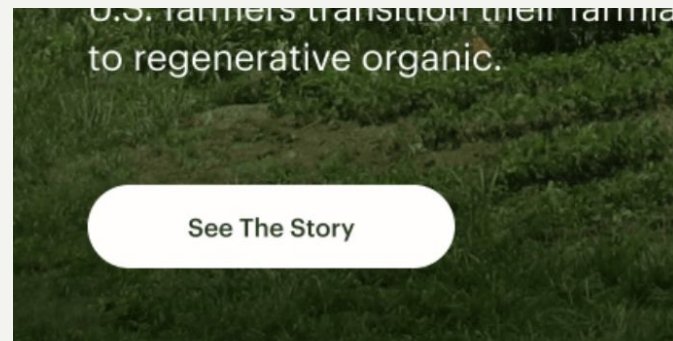
Send on a regular cadence.

Emails sent on **Wednesdays and Fridays** show higher engagement rates.

Late morning and early afternoon emails perform better.

Tip #6

Drive Action with Strong, Simple CTAs

Tip #7

Make Technology Work for You

Use AI to generate and brainstorm content ideas, write subject lines and copy, and even generate visuals.

Reduce manual tasks data entry, follow-up emails, and survey responses.

Tip #8

Verify & Authenticate Your Domain

Increases email deliverability and builds trust with inbox providers.

Add SPF, DKIM, and DMARC Records to your DNS settings. Will need to be done through your domain host.

Documentation can be found through your email platform.

Why should you care about a CRM?

The 2024 Nonprofit Technology Trends Survey found that the top internal challenge for nonprofits in 2024 is a lack of automation and organizational efficiency.

Streamline Your Supporter Engagement

Customer Relationship Management (CRM): helps organizations manage and analyze interactions with donors, supporters, and contacts.

Purpose: Centralizes all contact information, tracks communication, and provides insights for building stronger relationships.

Benefits for Nonprofits:

- Enhanced Donor Relationships 🤝
- Data-Driven Decision Making 📊
- Streamlined Operations and Efficiency ⚙️

What To Look For In a CRM

Donor Management: Track contributions and engagement.

Volunteer Coordination: Schedule and communicate effectively.

Event Management: Track and manage the marketing and operations of event planning.

Email Integration: Seamlessly connect with email marketing tools.

Analytics & Reporting: Gain insights to drive decisions.

Scalability: Grows with your organization.

Popular CRMs for Nonprofits

Platform	Features	Starting Price
Neon One	Event management, program management, fundraising, operations.	$99 per user
Salesforce Nonprofit Cloud	Donor management, fundraising, marketing automation, and analytics.	$60 per user

Putting It All Together

Integrate Email Marketing and CRM

1. **Collect Data:** Gather information at every touchpoint.

2. **Segment Audience:** Group supporters by interests and behaviors.

3. **Create & Execute:** Build and send campaigns based on the strategy you build.

4. **Automate Communication & Processes:** Use workflows for timely messages.

5. **Analyze & Adapt:** Regularly review metrics and adjust strategies.

Email Marketing 🤝 CRM

Personalized Donation Appeals	Monthly Impact Updates or Newsletters	Targeted Event Invitations
Year-End Fundraising Campaigns	Volunteer Coordination & Communication	Event Management & Coordination
Survey Supporter Feedback	Automated Welcome Series	Internal Reminders & Tasks
Lapsed Donor Re-engagement Campaigns	Thank-You Emails	Surveys/Feedback

mhp•si

mhp•si

LITTLE ROCK · BENTONVILLE