**THE SALVATION ARMY CENTRAL TERRITORY
2018-2019 CRM STRATEGY**

20 AUGUST 2018

AGENDA

MEET THE DEG TEAM

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IP RAMP UP SUMMARY

What is an IP?

+ A unique set of numbers that identifies your email domain (similar to a social security number). The reputation of the IP is what determines if you make it to the inbox or get sent to spam (or blocked).
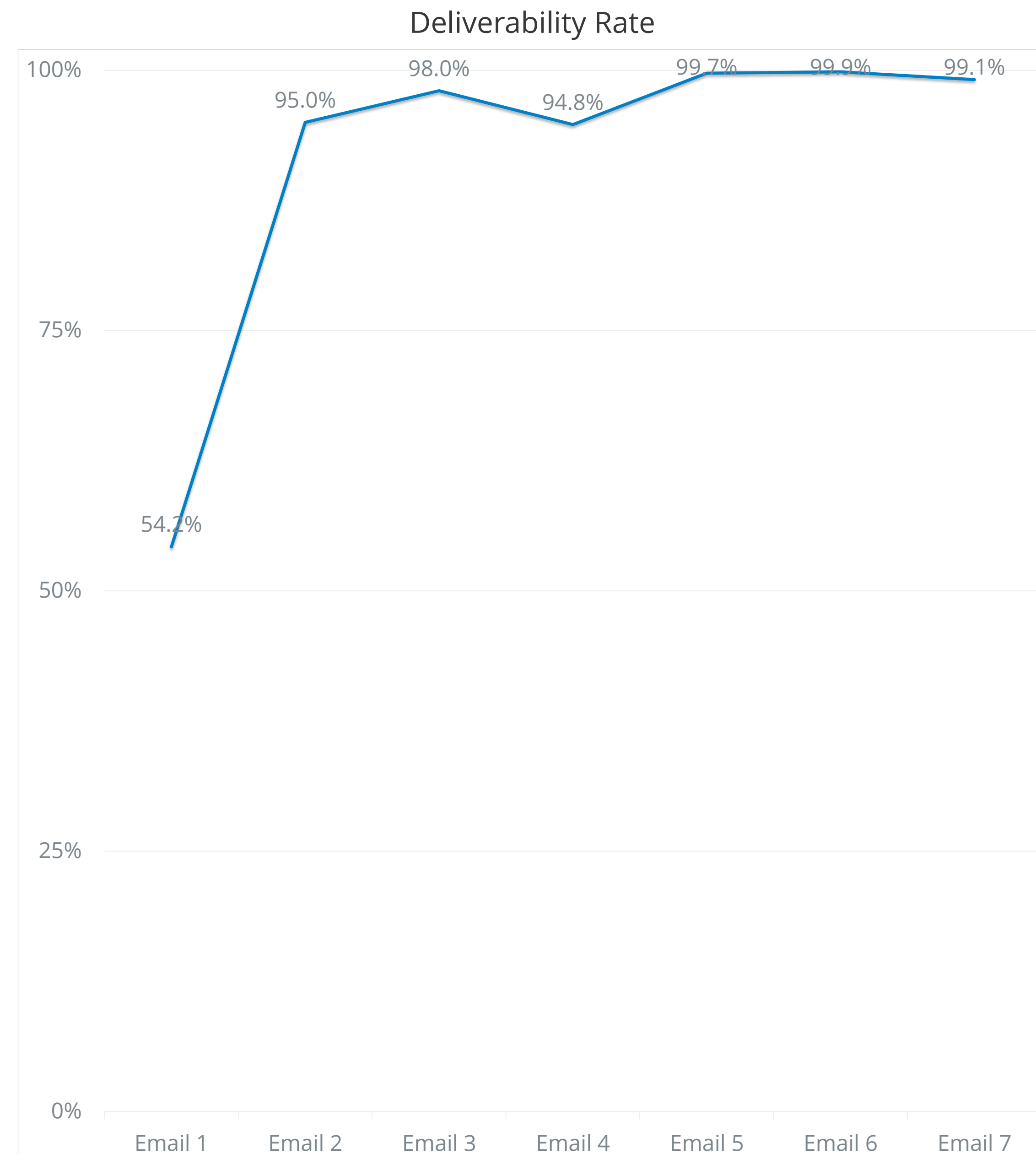
What is an IP ramp up?

+ A process to slowly increase the send volume overtime to ensure strong deliverability and avoid being marked untrustworthy by ISP's.

Why is it important?

+ Unfortunately a lot of bad actors in the past would set up new accounts and blast spam to a large number of people. This practice lead ISP's to being weary of any new IP that sends large volumes of messages right away. When they see this happening, they block the messages from getting through.

How did our IP ramp up go?

+ The Salvation Army Central Territory's IP ramp went as planned. Though we ran into the usual early hiccups with Comcast and Hotmail, they were quickly resolved. Over 7 weeks we were able to increase send volume to accommodate the entire list. Deliverability for the last send was very strong and the account is set to begin with its first territory wide campaign on August 28th.

Deliverability Rate

Email	Rate
Email 1	54.1%
Email 2	95.0%
Email 3	98.0%
Email 4	94.8%
Email 5	99.7%
Email 6	99.9%
Email 7	99.1%

CRM STRATEGY

Fresh Content

+ Hyper local

+ Engagement as a means to drive reciprocity

+ Showing our constituents we are better TOGETHER

+ Aiming to move our constituents emotionally to take action

Focus on Acquisition

+ Target high value constituents

+ Meet them in their moments of truth

Issues NOT Programs

+ Thought leaders

+ New angles to communicate (old) concepts

Stories, NOT Stats

+ Human truths

+ Enable divisions and corps to share stories

User-Centric / Value-Driven

+ Identify and act on active and inactive audiences

+ Focused CTAs (limit to most important)

+ Give the audience power over topics and frequency

+ Aiming to spark THEIR interests

+ Maintain constituent trust in the brand

+ All content should ladder up to one or more of the following categories.

❑ Volunteer Opportunities

❑ Stories of Lives Changed

❑ Upcoming Events & Drives

❑ Spiritual Inspiration & Prayer

❑ Salvation Army Stores

❑ Special Giving Opportunities

❑ Planned Giving

DEG + THE SALVATION ARMY
CRM STRATEGIC FRAMEWORK

OUR NORTH STAR

Drive donations of time, talent and treasure through inspiring content and engaging appeals

AS YOUR CRM AGENCY...

DEG is responsible for creating and delivering personalized communications in order to embolden, endear and appeal to constituents across their journey with The Salvation Army

BRAND BENEFIT

A commercially valuable direct relationship with constituents fueled by data-driven, actionable donor insights

CONSTITUENT BENEFIT

The community of a social contract aimed at doing implicit good with real, attainable and recognizable opportunities to participate

CRM STRATEGIC IMPERATIVES

EXECUTE CHANNEL BEST PRACTICES

Optimize cadence and deliverability with focus on the salient, conversion oriented narrative, and establish our digital credibility within the email channel

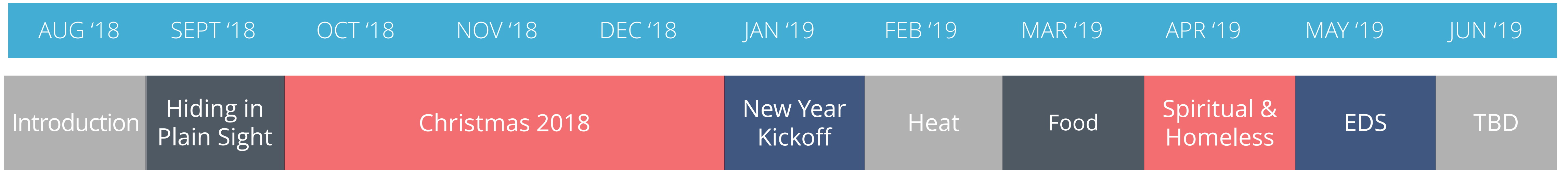| ACQUIRE THE NEXT GENERATION	KNOW THE DONOR	PERSONALIZE THE JOURNEY	INCREASE DONOR VALUE
Align our organizational competencies with generational interests to grow the addressable database and lower the average age	Progressively cultivate rich constituent profiles through profile centers, surveys, two-way dialogue and as implied by digital body language	Develop automated processes to deliver personalized, contextually relevant marketing across the customer journey	Discover, prioritize and model donor attributes in order to increase marketing-generated opportunities and revenue

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2018-2019 EMAIL CAMPAIGNS

DEG

EMAIL TIMELINE

AUG '18	SEPT '18	OCT '18	NOV '18	DEC '18	JAN '19	FEB '19	MAR '19	APR '19	MAY '19	JUN '19

| Introduction | Hiding in Plain Sight | Christmas 2018 | New Year Kickoff | Heat | Food | Spiritual & Homeless | EDS | TBD |

Content & Messaging To Be Determined

WHY THESE CAMPAIGNS?

WHY NOW?

Rotter's three attributes of trust

What we consciously and subconsciously assess when we decide to trust.

Brands must understand how they are perceived across these distinct elements.
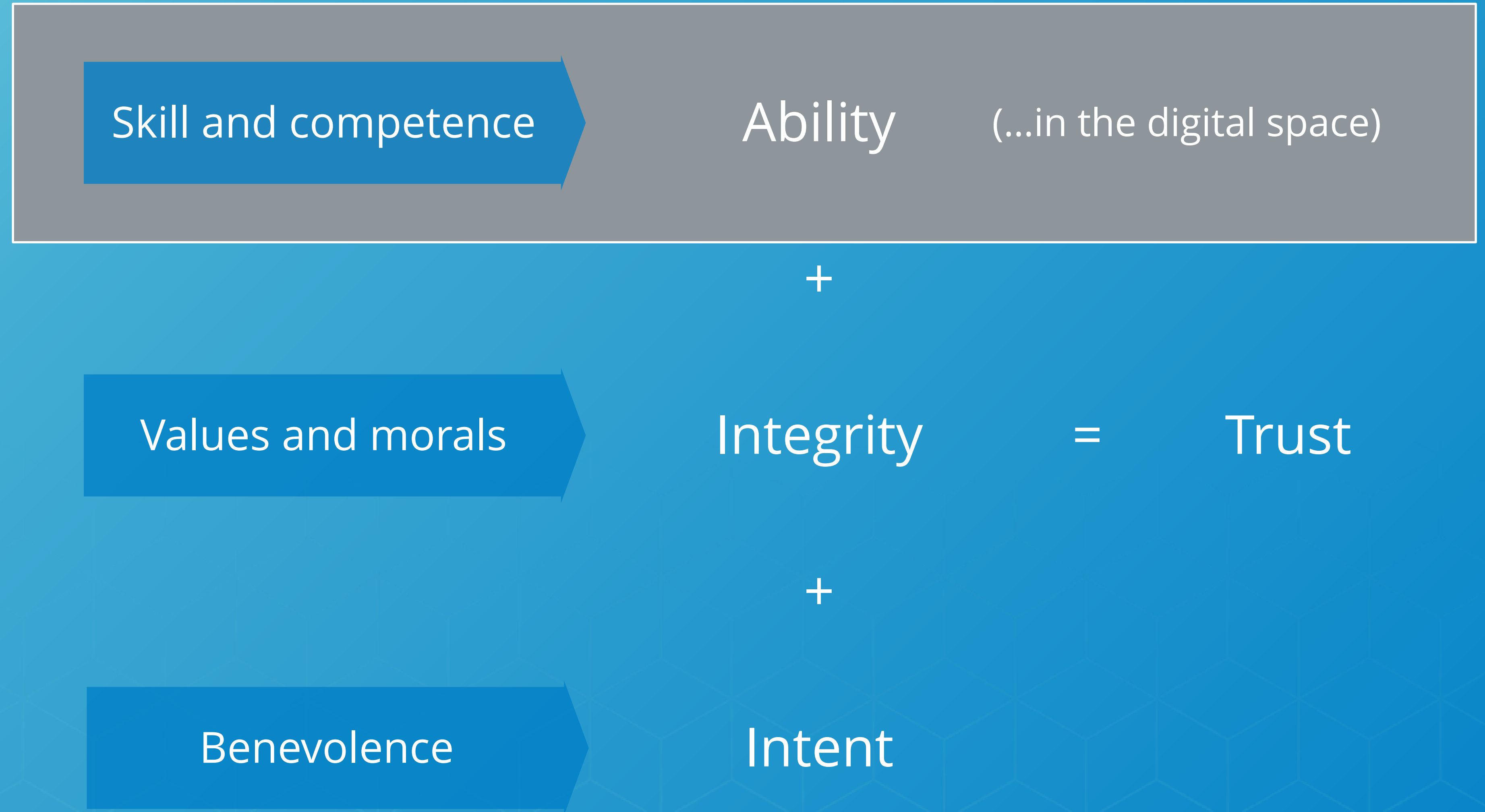
Ability

+

Integrity   =   Trust

+

Intent

Rotter's three attributes of trust

What we consciously and subconsciously assess when we decide to trust.

Brands must understand how they are perceived across these distinct elements.

Skill and competence → **Ability** (...in the digital space)

+

Values and morals → **Integrity** = **Trust**

+

Benevolence → **Intent**

To convince our constituents that **The Salvation Army** is built to meet the **size and scale of today's need**, we will proactively communicate our **ability, intent and integrity to build trust** in advance of targeted appeals.

Aug
28
9:00AM

Reasons to Read

+ The Salvation Army's emails will be different going forward

+ Thank them for their support and explain the new program

+ Focus on adding value to their lives and informing them of ways to get involved

Creatively/Strategically

+ Informative and fun

+ We are adjusting to better fit their needs

+ Think of a welcome email explaining what's to come
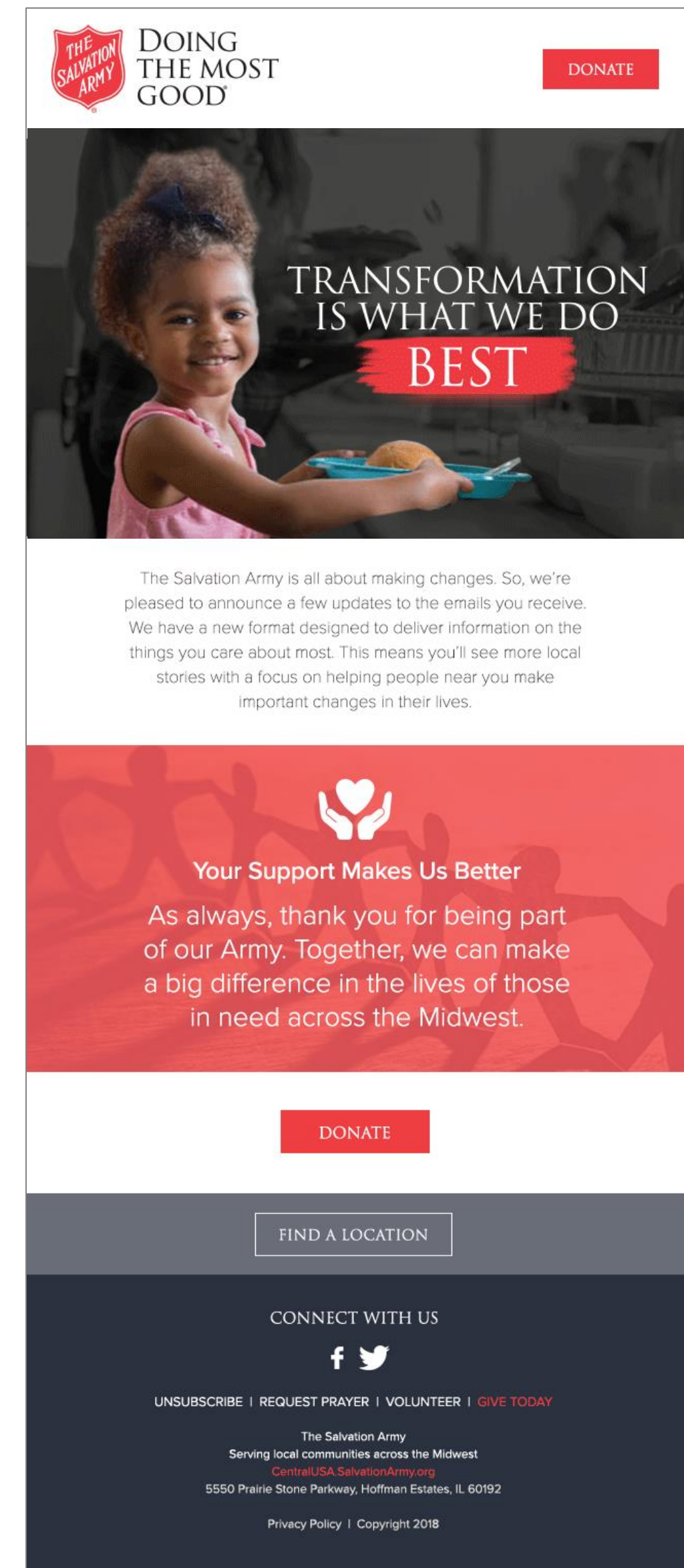
* Pending THQ Approval

WHAT ARE WE DOING?

The first series under the new email program will be the epitome of the new content strategy of the central territory. The series will offer value to the reader through an interesting story highlighting how to make the world around them better by being able to spot and react to the needs hiding in plain sight.

HIDING IN PLAIN SIGHT

SEPTEMBER 2018

HIDING IN PLAIN SIGHT – SEPT 4

VOLUNTEER'S PERSPECTIVE – SEPT 11

HOW IT HELPED – SEPT 18

REFLECTION – SEPT 25

SEPT
4
AM/PM

Reasons to Read

+ See what's coming

+ Introduction to the characters and the cause

Creatively/Strategically

+ Sneak peak- don't give everything away

+ Think of a book synopsis on the back cover

+ 50/50 test on morning vs afternoon timing

What We Need

❏ The stories we will be focusing on

Interim Deliverables

❏ Dynamic Content & Personalization Rules

❏ *Target Goal*

SEPT
11
TBD

Reasons to Read

+ Story of a person who recognized a need and reached out to help someone

+ CTA will be to volunteer with us / meeting a need you come across today, no matter how small (invite a neighbor to eat dinner with you)

Creatively/Strategically

+ Hone in on what they saw, felt, experienced. We want the reader to be able to relate

+ Test day of the week: Tuesday vs Thursday

What We Need

❑ The story

Interim Deliverables

❑ Dynamic Content & Personalization Rules

❑ *Target Goal*

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SEPT
18
9:00AM

Reasons to Read

+ See the impact of one volunteer's decision to help

Creatively/Strategically

+ Show the effectiveness of the programs offered by The Salvation Army

+ Readers should come away knowing their donations make these programs possible

+ Main CTA: donate

+ Stay positive

+ Test CTA copy

What We Need

❑ The story

❑ Details on the program involved

Interim Deliverables

❑ Dynamic Content & Personalization Rules

❑ *Target Goal*

DⵙG + THE SALVATION ARMY DOING THE MOST GOOD

SEPT
25
9:00AM

Reasons to Read

+ Conclusion to the story

+ Recap what we've learned and suggest the reader reflect on how they could help their communities

Creatively/Strategically

+ CTAs: donate, volunteer, and pray with us

+ Should be a simple, calm message

+ Stay away from being busy or heavy

What We Need

❑ The story

❑ How can we track the number of prayers requested?

❑ How can we track the number of volunteers that sign up?

Interim Deliverables

❑ Dynamic Content & Personalization Rules

❑ *Target Goal*

Q1 | OCTOBER – DECEMBER 2018

CHRISTMAS 2018

DEG + THE SALVATION ARMY | DOING THE MOST GOOD

WHAT ARE WE DOING?

With the Christmas season comes an influx of spending and our peak contribution period.

We will expose our constituents to the many means and reasons to give to The Salvation Army. All constituents, regardless of financial capacity will feel empowered to contribute and emboldened by doing so.

OCTOBER	NOVEMBER	DECEMBER
VOLUNTEER – OCT 2	LISTICLE: PEER TO PEER – NOV 6	THIS NOT THAT 1 – DEC 4
PEER 2 PEER – OCT 9	GIVING TUESDAY PREVIEW – NOV 13	THIS NOT THAT 2 – DEC 11
LISTICLE: FALL AT STORES – OCT 16	RED KETTLE KICKOFF – NOV 20	GENERAL ASK – DEC 18
VOLUNTEER – OCT 23	THANKSGIVING – NOV 22	CHRISTMAS EVE – DEC 24
RECURRING ASK – OCT 30	GIVING TUESDAY – NOV 27	TAX / EOY – DEC 30
		TAX / EOY – DEC 31

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Key: RE-SEND

OCT 2 9:00A   **OCT 23** 9:00A

Reasons to Read

+ Email 1: Volunteer needs for the upcoming season

- List of opportunities that each division supplies with links to sign-up

- Example: bell ringing opportunities

+ Email 2: Bell ringers: how you can make an impact

- Explain why it matters, details of the responsibilities, and how to sign up

- Testimonial from a bell ringer on why it is important to them

What We Need

- ☐ List of volunteer opportunities by division
- ☐ Default items for anyone not in a division
- ☐ Landing pages for volunteer signups
- ☐ How can we track the number of volunteer generated?
- ☐ Who to exclude (people who have already signed up, areas with no opportunities, etc.)
- ☐ Details on how much more money is donated when a bell ringer is present

Interim Deliverables

- ☐ Test Plan
- ☐ Dynamic Content & Personalization Rules
- ☐ Target Goal

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OCT 2 9:00A   **OCT 23** 9:00A

Creatively/Strategically

+ Images of people having fun

+ Consider families volunteering together

+ Link to divisional landing pages for signing up.

+ Both emails should have secondary CTA to donate

What We Need

❑ List of volunteer opportunities by division

❑ Default items for anyone not in a division

❑ Landing pages for volunteer signups

❑ How can we track the number of volunteer generated?

❑ Who to exclude (people who have already signed up, areas with no opportunities, etc.)

❑ Details on how much more money is donated when a bell ringer is present

Interim Deliverables

❑ Test Plan

❑ Dynamic Content & Personalization Rules

❑ Target Goal

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OCT
9
9:00A

NOV
6
9:00A

Reasons to Read

+ Email 1: Introduction to P2P

- What: Explain the concept of P2P fundraisers
- Why: It's easy, it feels good, it's the right thing to do, it's an alternative means of giving, it spreads our message, it can happen all year long
- How: Explain the steps for signing up

+ Email 2: Listicle of our favorite P2P Campaigns

- Four ways to make the upcoming holidays about others:

  1.) Donate your day (*Christmas Day*)   2.) Take on a challenge (*Turkey Trot*)

  3.) Host an event (*give your holiday party meaning*)   4.) Get creative

What We Need

❑ How will we track P2P giving to this campaign?

❑ How do we update the P2P receipt with opt-in CTA?

Interim Deliverables

❑ Test Plan

❑ Dynamic Content & Personalization Rules

❑ Target Goal

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OCT	NOV
9	6
9:00A	9:00A

Creatively/Strategically

+ Test the altruism scale – from what value you can get out of running a P2P campaign to the value you bring to The Salvation Army

+ Test the agentic-communal scale – from the self is primarily defined by one's individual capacity for personal control (YOU can make a change) to the self is primarily defined by one's social connection to others (TOGETHER we can make a change)

+ Example P2P campaign: https://support.classy.org/customer/portal/articles/2476627-campaign-types-on-classy

+ CTA: Start your P2P fundraiser today

What We Need

❑ How will we track P2P giving to this campaign?

❑ How do we update the P2P receipt with opt-in CTA?

Interim Deliverables

❑ Test Plan

❑ Dynamic Content & Personalization Rules

❑ Target Goal

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OCT
16
9:00A

Reasons to Read

+ Ways to prepare for fall using items commonly found at The Salvation Army Stores

+ Examples: costumes, costume jewelry, coats and winter accessories, décor, wardrobe refresh, baskets, etc.

+ Stores fund programs in your area (dynamically populate the program supported by zip code)

Creatively/Strategically

+ Should be fun and engaging

+ CTA drives to find your store landing page

What We Need

❑ List of fall items

❑ Landing page for finding local stores

❑ How can we track those who donate or buy?

❑ Who to exclude (no stores near them)?

❑ Causes supported by zip code

Interim Deliverables

❑ Test Plan

❑ Dynamic Content & Personalization Rules

❑ Target Goal

OCT
30
9:00A

Reasons to Read

+ Feature a story on The Salvation Army's Pathway of Hope Program

  • Program is territory-wide

  • Involves families overcoming crisis

  • People are involved for months to years but there are numerous success stories

Creatively/Strategically

+ Focus on the story and on success. Stay positive

+ Dynamic asks testing higher and lower recurring donations

+ CTA: Donate

What We Need

❑ Exclusion list of recurring donors.

❑ The story

Interim Deliverables

❑ Test Plan

❑ Dynamic Content & Personalization Rules

❑ Target Goal

NOV
13
9:00a

NOV
27
9:00A

Reasons to Read

+ **Email 1: What is Giving Tuesday and why give to TSAC?**

  • CTAs for a reminder email and donate now for those who don't want to wait

+ **Email 2: Giving Tuesday is here!**

  • Dynamic donation CTAs based on mosaic profiles and previous donations

  • Different copy for those who asked for a reminder vs those who did not

Creatively/Strategically

+ All emails to have a direct ask

+ Use dynamic content if possible to pull in local information; e.g. city or first name

What We Need

❑ How do we track recurring giving to this campaign?

❑ Can we create dynamic donation CTAs that integrate with Classy?

Interim Deliverables

❑ Test Plan

❑ Dynamic Content & Personalization Rules

❑ Target Goal

NOV
20
9:00A

Reasons to Read

+ Red kettles will start appearing around them if they have not already been out

+ Give them a reason to give

+ Continue the warm feeling about the kettles and the season in general

Creatively/Strategically

+ Emphasize the red kettle (content area to be carried through to Christmas)

+ Red kettle awareness is high and they have a positive reputation

+ Give the audience even more reasons to like The Salvation Army

What We Need

❑ Information about the Red Kettle program. History, where the money goes, etc.

Interim Deliverables

❑ Test Plan

❑ Dynamic Content & Personalization Rules

❑ Target Goals

NOV
22
9:00A

Reasons to Read

+ A thank you from The Salvation Army to its donors who make it all possible

+ Cut through the clutter – message on being thankful and family with no asks

Creatively/Strategically

+ Consider varying copy for recurring donors

+ Incorporate thank you note(s) from someone we've served

+ No-ask – truly aligned with the spirit of the holiday

+ Only one footer donate button

+ Simple and peaceful

What We Need

❑ Thank you note(s)

❑ List of recurring donors

Interim Deliverables

❑ Test Plan

❑ Dynamic Content & Personalization Rules

❑ Target Goal

DEC
4
6:00P

DEC
11
6:00P

Reasons to Read

+ Intriguing hyperbole driving aha moments of inflection

+ Altruistic rationale poking on the absurdity of some gifting

+ **Email 1: Do something meaningful vs. shopping for something meaningful**

    • A story or quote from someone who volunteered and how it changed their holiday season

+ **Email 2: Subscription vs recurring donation**

    • A story or quote from someone The Salvation Army has helped

What We Need

❑ Stories

❑ A way to track how many volunteer

❑ Exclusion list of recurring donors

Interim Deliverables

❑ Test Plan

    ❑ Email 1: Send Time

    ❑ Email 2: Donation Amounts high (Nordstrom box) vs low (coffee)

❑ Dynamic Content & Personalization Rules

❑ Target Goal

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DEC **4** 6:00P DEC **11** 6:00P

Creatively/Strategically

+ Test multiple price points (align price points with items featured)

+ Poke at excess, not deep-rooted traditions

+ Explore uniquely designed donation page

+ CTA for email 1: Sign up for bell ringing

+ CTA for email 2: Set up a recurring donation

What We Need

❑ Stories

❑ A way to track how many volunteer

❑ Exclusion list of recurring donors

Interim Deliverables

❑ Test Plan

   ❑ Email 1: Send Time

   ❑ Email 2: Donation Amounts high (Nordstrom box) vs low (coffee)

❑ Dynamic Content & Personalization Rules

❑ Target Goal

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DEC
18
6:00P

Reasons to Read

+ Lead with a story involving a family helped by The Salvation Army during the holidays

+ Dynamic asks based on mosaic profiles

+ Dynamic content area for divisions who want to talk about fundraising progress

Creatively/Strategically

+ Visually striking, thought provoking content

+ Must have a direct ask

+ Focus on the story and issues not on the programs

What We Need

❑ Can we secure in-kind donations from corporate sponsors/partners to surprise and delight in relation to this campaign's top donors?

❑ Can we try matching donations?

❑ Division progress

Interim Deliverables

❑ Test Plan

❑ Dynamic Content & Personalization Rules

❑ Target Goal

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DEC
24
9:00A

Reasons to Read

+ Jesus' Birthday

+ Directly aligned with our mission and values

+ Cut through the clutter – send on Christmas Eve to let the day be sacred and calm

Creatively/Strategically

+ Non-ask – truly aligned with the spirit of the holiday

+ Biblical text reference

+ Only one footer donate button

+ Simple and peaceful

Interim Deliverables

❑ Test Plan

❑ Dynamic Content & Personalization Rules

❑ Target Goal

DEC 30 8:00A
DEC 31 8:00A

Reasons to Read

+ The last opportunity to impact your tax burden

+ Creative wrap up of the holiday season and/or end of year (EOY)

Creatively/Strategically

+ Direct appeal

+ Emphasize urgency as a reason to give now

+ Reference last year's wrap up, one of the strongest emails sent

+ Resend to those who have not opened with new SL / PH

What We Need

❑ TSAC's PoV on Tax Code changes

Interim Deliverables

❑ Test Plan

❑ Dynamic Content & Personalization Rules

❑ Target Goal

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WHAT ARE WE DOING?

As calendars turn to 2019, people begin resetting for a new year. The Salvation Army will help by reminding the audience of all the good they've done over the past year and offering opportunities to continue making a difference.

JANUARY 2019

DONOR THANK YOU – JAN 8

DONATE TO STORES – JAN 15

VOLUNTEER – JAN 22

ENCOURAGE – JAN 29

JAN
8
9:00AM

Reasons to Read

+ Thank all donors for making 2018 miracles possible by doing the most good

+ Dynamically allow divisions to add a personalized message about how their campaigns performed

Creatively/Strategically

+ Minimal asks

+ Focus on the donors because they are what made it all possible

+ Optimistic and joyous

+ CTA: donate

What We Need

❑ Details on how many were helped

❑ Any exclusions?

❑ Division updates

Interim Deliverables

❑ Test Plan

❑ Dynamic Content & Personalization Rules

❑ *Target Goal*

JAN
15
9:00AM

Reasons to Read

+ Donating excess items after the holidays can change lives

+ Explain how The Salvation Army stores help their communities

+ Provide a list of frequently needed items

Creatively/Strategically

+ CTA: find your store

+ Dynamically populate the cause addressed in their area and items needed

What We Need

❑ Programs supported by the stores by zip code

❑ Divisional store needs by zip code

Interim Deliverables

❑ Test Plan

❑ Dynamic Content & Personalization Rules

❑ *Target Goal*

JAN
22
9:00AM

Reasons to Read

+ Reminder to those whose employers may compensate for volunteering hours

+ List of opportunities near them (3-5 opportunities)

Creatively/Strategically

+ CTAs: Sign-up, donate

+ Highlight a story of a volunteer and the positive impact it has had on them

What We Need

❑ List of opportunities by division

❑ Volunteer's story

❑ Example of a company that pays for volunteering time

❑ How can we track the number of volunteers that sign up?

Interim Deliverables

❑ Test Plan

❑ Dynamic Content & Personalization Rules

❑ *Target Goal*

JAN
29
9:00AM

Reasons to Read

+ The New Year is a time to set resolutions and tackle personal improvements

+ Remind the reader that some people are attempting major life changes

+ Allow the reader the ability to send a message of encouragement to someone who is just starting on their journey

Creatively/Strategically

+ CTA links to a custom landing page where they can write a message to someone in The Salvation Army's care

What We Need

❑ Landing page

❑ Reporting on how many forms are filled out?

Interim Deliverables

❑ Test Plan

❑ Dynamic Content & Personalization Rules

❑ *Target Goal*

DISCUSSION | QUESTIONS

NEXT STEPS

DEG

NEXT STEPS

+ DEG Strategy to deliver briefs for THQ input and approval

+ DEG Creative to develop email comps for all end of year campaigns for THQ input and approval

+ DEG Campaign Management to conduct a Teamwork training call for divisional Ad Hoc sends; the week of August 27th

+ Other projects inflight or coming soon:

- SFMC CRM Connector

- Dynamic Footer solution

- Preference Center

NEXT STEPS | CREATIVE PRODUCTION CALENDAR

THANK YOU!

APPENDIX