

2021 Email Campaign Strategy & Recommendations

The Salvation Army – Central Territory

AUGUST 2020



Agenda

- 01 YTD Results + FY 2021 Goals
- 02 Recent Changes + Current Projects
- 03 Content Calendar Review
- 04 Testing
- 05 Discussion



Our Team



ERIN SASS
Account Director



ANDREA HADEL
Account Supervisor



SYDNEY WILLIAMS
Account Manager



TRAVIS MCCAN
Sr. Relationship Marketing
Strategist




KATIE MANRING
Project Manager




THE DEG, SALVATION ARMY CENTRAL TERRITORY TEAM




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Analytics + Insight



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KATIE JACKSON
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Salesforce Marketing Cloud Engineer

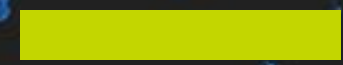
Media + Search



JILL PAGLUSCH
Paid Media Manager



YTD Results & Fiscal Year 2021 Goals





FY 2020 Campaign Engagement*

28%

OPEN RATE

Up 16% from 2019 (24%)

0.89%

CLICK-THROUGH RATE

Up 9% from 2019 (0.82%)

0.19%

UNSUBSCRIBE RATE

Down 35% from 2019 (0.29%)

***DEG deployed**

PROPRIETARY AND CONFIDENTIAL



FY 2020 Donation Summary – All Divisions*

5,210

NO. OF DONORS

Up 10% from 2019 (4,715)

7,524

NO. OF DONATIONS

Up 30% from 2019 (5,781)

\$1.14m

DONATION AMOUNT

Up 34% from 2019 (\$851.4k)

43%

REPEAT DONORS

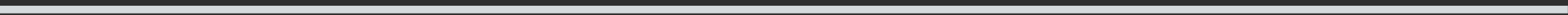
1,286 of FY 2020 donors had
donated in FY 2019

*Donations from Email Campaigns only

PROPRIETARY AND CONFIDENTIAL



2021 Q1 Goals

- + Revenue growth of 10% over FY 2020
 - + List growth of 20,000
- 



2021 Engagement Goals

OPEN RATE

- *Average over 29%*
 - 28% average for 2020
- Industry average 17%



CLICK THROUGH RATE

- *Average over 1.3%*
 - 0.9% average for 2020
- Industry average 0.6%

- Average bounce rate under 50%



UNSUBSCRIBE RATE

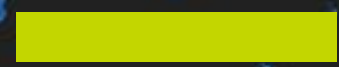
- *Average under 0.15%*
 - 0.19% average for 2020
- Industry Average 0.19%



*All engagement metrics are TBD based on new engaged criteria



Recent Changes & Current Projects



New “Engaged” Criteria

PAST CRITERIA

- Opened or clicked within an email with 120 days
- (Or) New within 120 days
- **Max list size roughly 50,000**

01

NEW CRITERIA- JUNE 2020

- Ability to vary last engagement (Open or Click) between 120 days and 365 days
- (Or) New within 1 year
- (Or) Donated within the past 18 Months if LTV >\$50
- **Max list size roughly 100,000**

02



A Note on Sending Criteria

- + The default for sends will be last email engagement (open or click) within 6 months
 - + Roughly one Territory-wide send per month will go to the larger list (engagement within 1 year)
 - + November through the end of December will utilize the full list
 - + Either list can be used for ad hoc sends or THQ sends
-





AD HOC GUIDELINES

Ad hoc sends will default to full file - anyone who has engaged within the past year, or is new, or donated within the past 18 months unless we are instructed by the division otherwise.





Shortened Deployments

- + Deployment times going into 2020 were roughly 6-8 hours to ensure inbox placement
- + Currently working on shortening sends to within 2 hours to allow for better testing capabilities, using Einstein Send Time Optimizer, and sending multiple times within the same day
- + The larger list of engagement within 1 year will take longer to deploy (roughly 2 hours with an optimized throttle)
- + Planning to complete transition to shorter sends by September 2020



Welcome Journey

Having trouble viewing this email? [View it online.](#)



[DONATE](#)



WELCOME, %FNAME%!

The Salvation Army exists to meet human need wherever, whenever and however we can.



HOW WE MAKE A DIFFERENCE

-  Each year we help approximately **25 million** Americans
-  Almost **3.3 million** volunteers donate their time and resources each year
-  We provide assistance in **130** countries worldwide


[GET INVOLVED](#)

YOU CAN TRANSFORM LIVES BY HELPING US:

- Fight Poverty & Hunger
- Provide Emergency Disaster Relief
- Overcome Drug or Alcohol Addiction
- Care for Youth & Elderly in Your Community and so much more.

[DONATE](#)

Having trouble viewing this email? [View it online.](#)



[DONATE](#)

**ONE VOLUNTEER.
ONE COMMUNITY.
A WORLD OF DIFFERENCE.**

Every community we serve is different. So every local program is truly unique. We work to understand the distinct issues in your area. And we rely on our volunteers to help provide the best solutions to help local people in need. Because doing good takes more than a village — it takes an army.

GIVING BACK IS GOOD FOR YOU & YOUR COMMUNITY

According to a recent research project at Exeter Medical School with evidence from 40 different studies over the last 20 years, volunteering "had favorable effects on depression, life satisfaction and well-being."

%FName%, change starts with one act of kindness. Find a volunteer opportunity near you and join us today!

[VOLUNTEER](#)

Having trouble viewing this email? [View it online.](#)



[DONATE](#)



FILLING STOMACHS AND HEARTS


Missing a meal can be hard. But, what if you didn't know when your next meal would come? Every day, The Salvation Army takes away this fear. We partner with people like you to provide nutritious foods for those in need in your community.




Did you know?
Our supporters help us serve **153,000** free meals every day nationwide.

[DONATE](#)

Having trouble viewing this email? [View it online.](#)



[DONATE](#)




PROVIDE THE WARMTH OF HOME

Every night, thousands of people sleep safely because of The Salvation Army. We ensure a warm bed — providing shelter for those who have lost their home, supportive housing for those getting back on their feet, and rent and utility assistance to keep individuals and families from becoming homeless in the first place.


Did you know?
The Salvation Army houses almost **30,000** homeless Americans each night.

[DONATE NOW](#)

Having trouble viewing this email? [View it online.](#)



[DONATE](#)



Doing Good Calls for a Personalized Approach

We believe it takes an army to positively impact a community. That's why we aim to share fresh ideas about how you can make a difference, stories that inspire, and so much more through our emails. Now that you're familiar with our name in your inbox, we hope you'll stick around to see the content we create with you in mind.


It's important to us that you're in control of what you receive. That's why we also give our subscribers the option to choose which types of emails they want.

YOU'RE CURRENTLY SUBSCRIBED TO THE FOLLOWING TOPICS:

If you'd like to make a change, simply click below and select the options that are most relevant to you.

- Volunteer Opportunities**
- Salvation Army Stores**
- Stories of Life Change**
- Upcoming Events and Drives**

[VIEW MY PREFERENCES](#)



Your Support Makes Us Better


As always, thank you for being part of our Army. Together we can make a big difference in the lives of those in need in your community.

- + Launched May 2020
- + Aimed at introducing new subscribers to The Salvation Army and get them accustomed to the types of messages and cadence they can expect
- + Emails sent weekly


One-time Donor Journey

- + Launched first week of August 2020
- + Aimed at retaining past donors
- + Sending on the one-year anniversary of a subscriber's last donation
- + Automation consists of only one email celebrating the good resulting from the donor's last gift and asking for another gift

Having trouble viewing this email? [View it online.](#)








[DONATE](#)



HAPPY ONE-YEAR ANNIVERSARY OF YOUR GENEROUS DONATION!

One year ago today, you may not remember what you were doing—but we do! We received a very special donation from you. To thank you once again, we wanted to let you know what you've helped us achieve in the last 365 days. In that time, we've provided:

 <p>52.6 MILLION Hot Meals</p>	 <p>9.8 MILLION Nights of Safe Shelter</p>	 <p>2.6 MILLION Holiday Gifts and Necessities</p>
 <p>16.8 MILLION Items Like Clothing and Furniture</p>	 <p>Disaster Assistance to 798,336 PEOPLE</p>	 <p>Substance Abuse Help to 150,643 PEOPLE</p>

AND SO MUCH MORE!

Your gift brought hope, comfort and healing to those who needed it most. We're so thankful for your support. But our work together is not done.

Every day, more and more people are turning to The Salvation Army for help. [Name], please consider making another gift and join us in Doing the Most Good®. Your gift stays in your local community to serve your neighbors in need.


[DONATE](#)

“The Salvation Army was the world to me at a time where my world was caving in.”

— CONSTANCE

Birthday Journey


Having trouble viewing this email? [View it online.](#)

 **DOING THE MOST GOOD** [DONATE](#)

GIF

3 SPECIAL WAYS
To Celebrate Your Birthday


Hooray! Your birthday is just around the corner—and we can't wait to celebrate you. Looking for some ways to make this year's celebration more fun and meaningful? Check out these great ways to share the joy.

 **MAKE BIRTHDAY KITS**
Help those in need celebrate birthdays with their children or loved ones by making kits to donate—complete with cake mix, candles and other essentials. Deliver them to us and each will go to a household we serve to ensure no birthday passes without the means to celebrate.

[DOWNLOAD INSTRUCTIONS](#)

DONATE YOUR DAY
Challenge friends and family to give to The Salvation Army in honor of your birthday. Select a city and cause to support with the funds you raise.


[START YOUR FUNDRAISER](#)

 **GIVE YOUR AGE**
Celebrate by donating or volunteering time equal to your age—\$1 or hour for every year you've been blessed with. Don't worry, your secret's safe with us.

[GET STARTED](#)


DID WE MISS YOUR SPECIAL DAY?
[UPDATE MY BIRTHDAY](#)

Having trouble viewing this email? [View it online.](#)

 **DOING THE MOST GOOD** [DONATE](#)

GIF


HAPPY BIRTHDAY!




[Name,] thank you for being part of The Salvation Army family. The kindness and generosity you've shown others makes a difference. You matter to us and those we serve. We celebrate you today.

DID WE MISS YOUR SPECIAL DAY?
[UPDATE MY BIRTHDAY](#)

Having trouble viewing this email? [View it online.](#)

 **DOING THE MOST GOOD** [DONATE](#)

GIF



A GIFT THAT KEEPS ON GIVING

We hope you had a wonderful birthday, [Name]. If you received any gifts to replace something you already own, please consider donating unneeded items at one of our stores. We'll find someone who can give it a new home. The best part—items sold at our stores fund programs that give new life to those seeking a fresh start.

[COMMON ITEMS WE ACCEPT](#)

[DONATE GOODS](#)

- + Launched second week of August 2020
- + Aimed at personalizing the email experience, reengaging dormant subscribers, and promoting peer-to-peer giving
- + Three-part series sent to anyone who has provided their birthday
 - One month before – ways to celebrate and give back
 - Day of their birthday – Happy birthday
 - 1 Week after their birthday – Donate unneeded or replaced items

Local Content



Personalization Types



Segmentation

Excluding uninterested audiences in specific content

Basic Personalization

Including basic subscriber information within the email such as first name.

Dynamic Zones

Change out blocks of copy or imagery based on subscriber attributes

Automations & Journeys

Trigger specific messages to subscribers based on their actions

Einstein Content Selection

Dynamic content determined by Salesforce AI to optimize performance

User Generated Content

Pulling user generated content from social media into email messaging

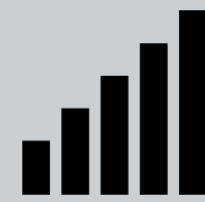
LEVEL OF IMPACT



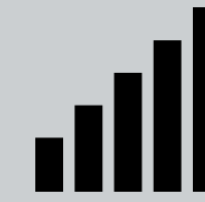
LOW



LOW



HIGH



HIGH



HIGH



MEDIUM

LEVEL OF EFFORT



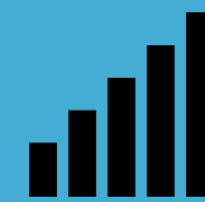
LOW



LOW



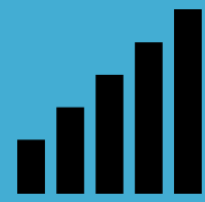
MEDIUM



HIGH



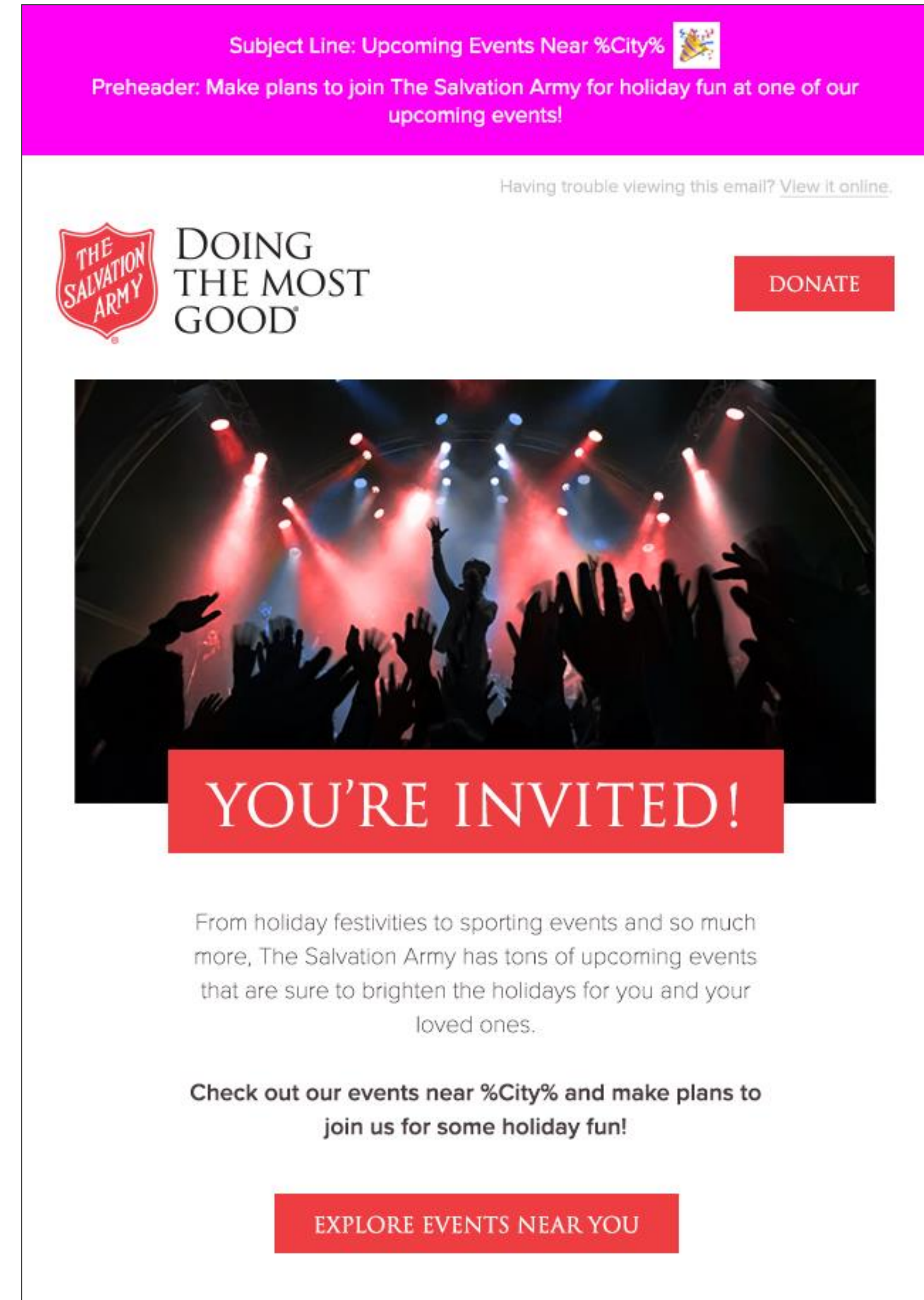
MEDIUM



HIGH

Basic Personalization

- + Adding First Name or City within the email copy or subject line
- + Industry studies and our own testing has shown basic personalization to increase engagement (open and click through rates)



Having trouble viewing this email? [View it online.](#)



[DONATE](#)



IT'S THE MOST WONDERFUL TIME TO VOLUNTEER

Red kettles will be hitting the streets soon, and you can reserve a bell ringing shift near you today!

Volunteer bell ringers are crucial partners in funding the good we do all year long. Sign up today and help us ring in the holidays by making a difference in your community.

[REGISTER TO RING](#)



OTHER HOLIDAY VOLUNTEER OPPORTUNITIES NEAR YOU

%POSITION TITLE%
%Location%
%Description%

%POSITION TITLE%
%Location%
%Description%

[VIEW MORE](#)



Dynamic Content

- + Changing elements within the email based on subscriber attributes such as event information based on zip code
- + DEG provides direction on specific content needs
- + Previous dynamic campaigns have been very successful at getting subscribers to click



Working With Divisions

- + Met with divisions to understand local content requirements and wants shortly after mapping out THQ email content plan
- + Will continue to build out local direction with divisional support and testing

What We Heard

DIRECTION FROM DIVISIONS

- + Fully dynamic content takes too much effort to be effective
 - Prefer sends with dynamic text and links
 - DEG providing direction documents per send were helpful
 - Require extra time to gather information
- + Focus on early first quarter messaging around events
- + 1-2 messages max per quarter

2021 Q1 Local Content

EVENT PROMOTION

- + Divisions will be able to promote local events throughout October and early November
- + Divisions will be able to provide event details and links to local landing pages

LOCAL IMPACT

- + For end of year campaigns, we want to pull in where the help is needed most locally
- + We're looking to pull in local stats to improve conversion and revenue

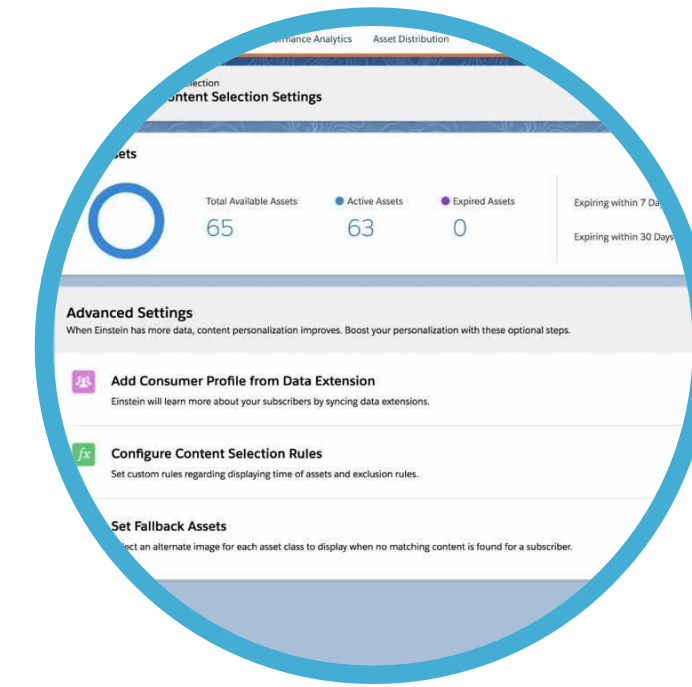
Einstein Capabilities



Einstein Capabilities



SEND TIME OPTIMIZATION



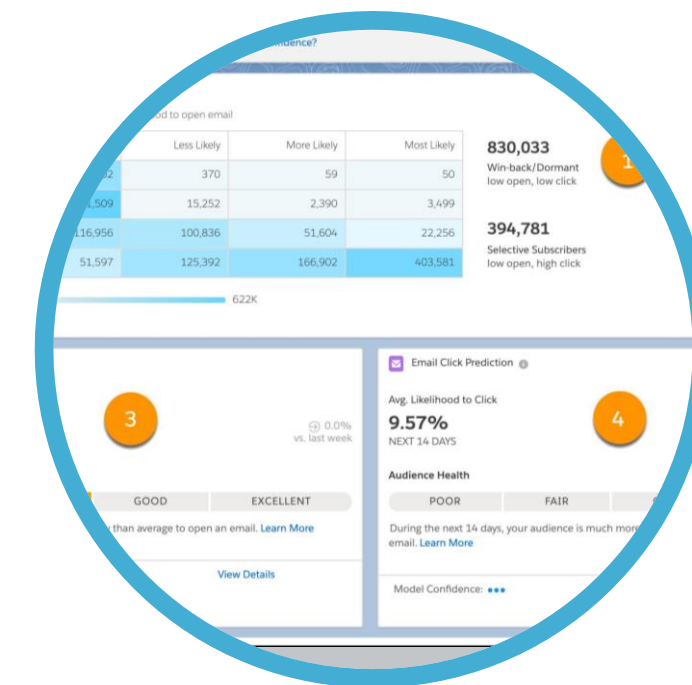
CONTENT SELECTION



COPY INSIGHTS



MESSAGING INSIGHTS



ENGAGEMENT SCORING



ENGAGEMENT FREQUENCY





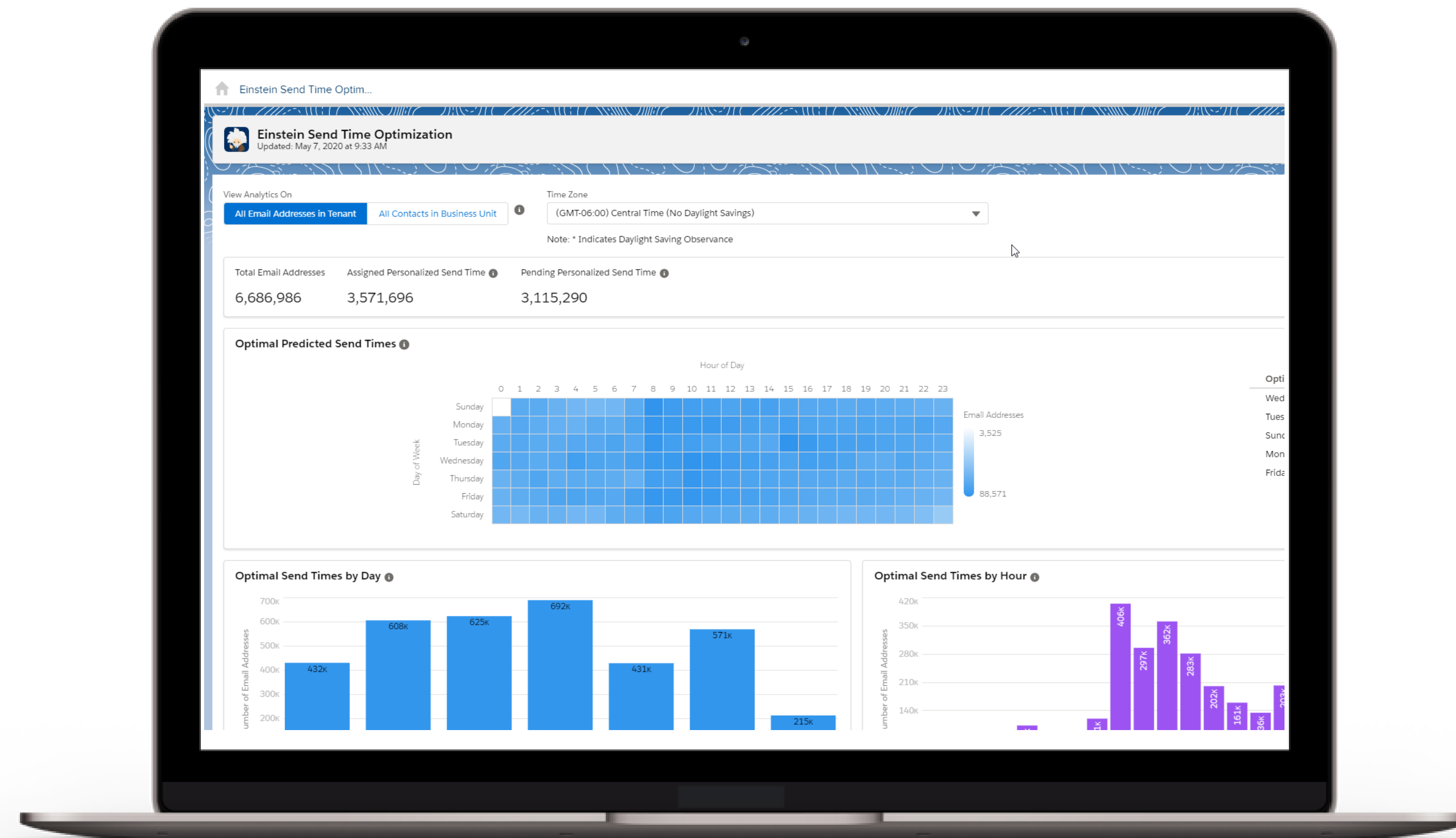
Three Technology Capabilities for 2020+

- + Einstein Send Time Optimization
- + Einstein Content Selection
- + Journey Builder for Campaigns



Send Time Optimization

- + Discover the optimal send time
 - Learn when emails are likely to be opened and clicked by every individual subscriber
- + Automatically deliver messages at the right time
 - Deliver messages when each is most likely to engage



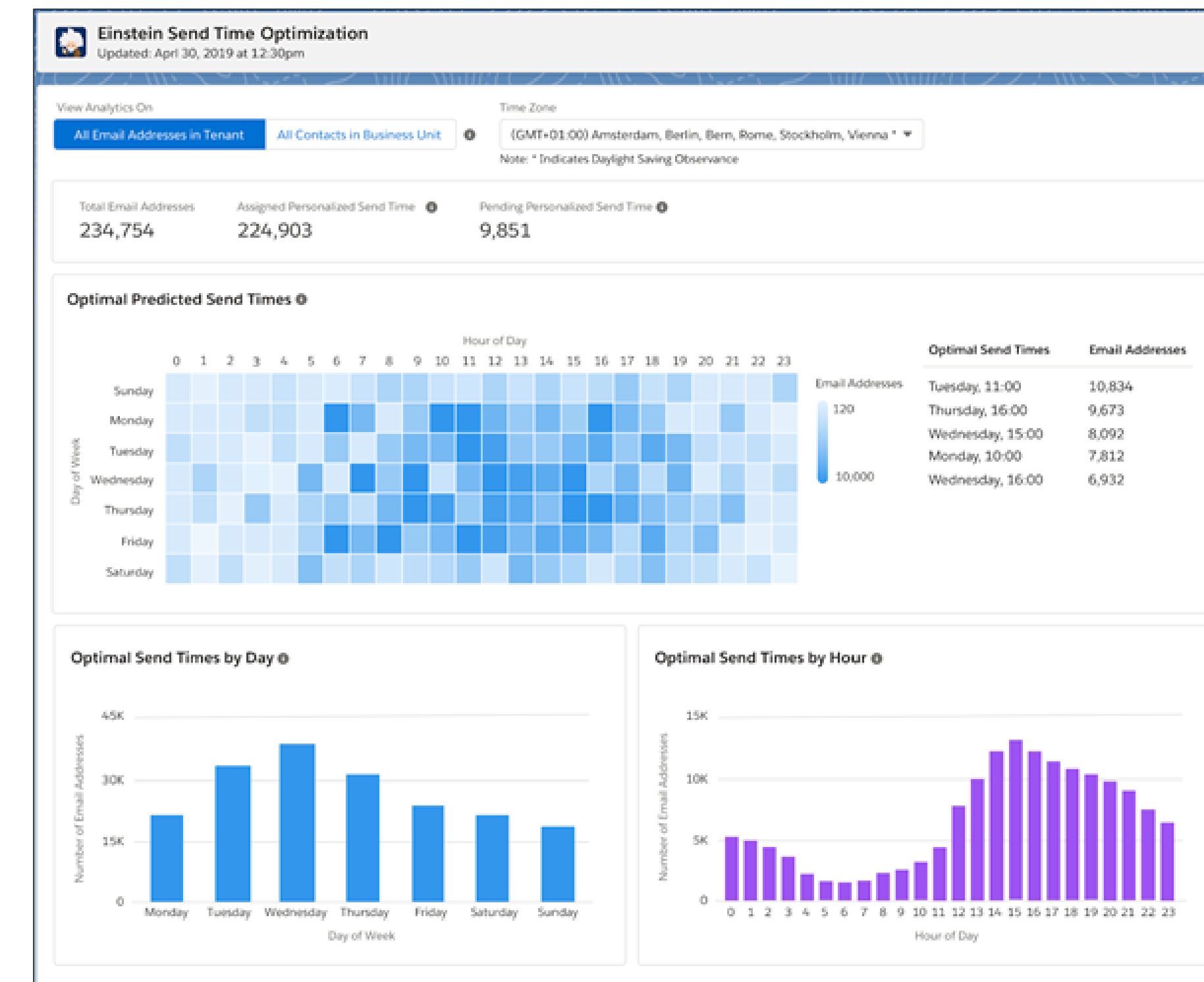
Using Send Time Optimization (STO)

DEPLOYING AT THE RIGHT TIME

- + STO can only be *activated* within Journey Builder
- + Adding STO to a campaign is simple
 - Just drag the STO activity in front of an email to use
- + STO will deploy at the time determined to be the most likely to be opened

UNDERSTANDING BEHAVIORS

- + The STO dashboard provides insights into time of day and day of week engagement cohorts





A Few Notes on STO

- + If the optimal time is unknown SFMC will deploy at the most common time or immediately.
- + Although most consider STO optimizing sends by time of day, STO can also optimize send day by selecting a longer period (a week for example)

Watch this overview to learn more:

<https://www.youtube.com/watch?v=99GazPQcZxQ>





Einstein Content Selection

- + Einstein Content Selection (ECS) enables personalization at scale, boosting click-to-open rates
- + ECS selects the most relevant asset at the moment of send based on engagement and user defined rules
- + ECS allows teams to understand what types of content work best for which audiences and uses fatigue rules to minimize over-exposure of content

The screenshot displays the Einstein Content Selection interface. At the top, there is a navigation bar with tabs for 'Einstein Content Selection', 'Performance Analytics', 'Asset Distribution', and 'Settings'. The 'Settings' tab is active. The main content area is divided into two sections: 'Assets' and 'Advanced Settings'.

Assets Section:

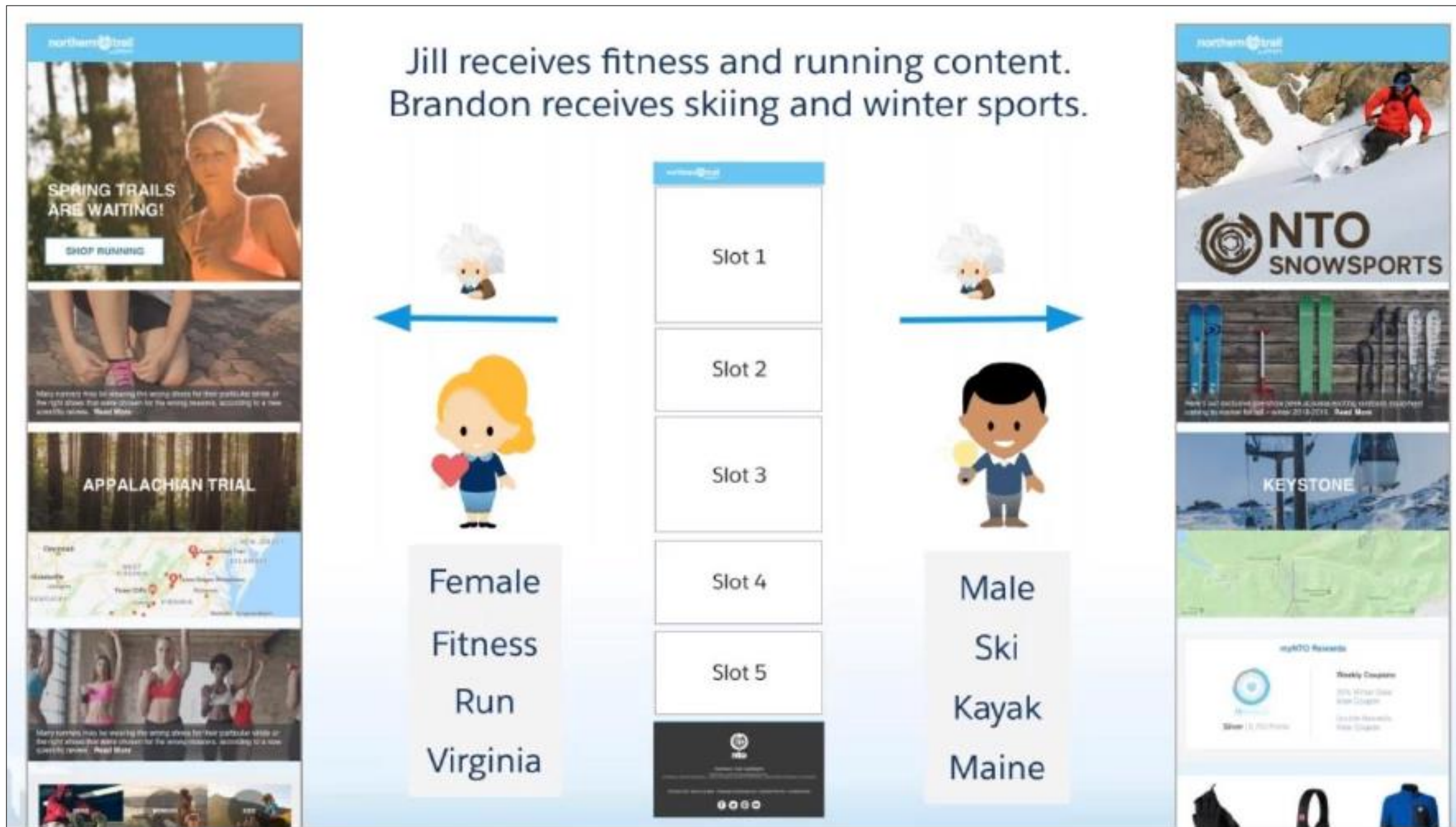
- Total Available Assets:** 132
- Active Assets:** 107
- Expired Assets:** 1
- Expiring within 7 Days:** 0
- Expiring within 30 Days:** 0
- Asset Classes:** 18

Advanced Settings Section:

- Add Consumer Profile from Data Extension:** Einstein will learn more about your subscribers by syncing data extensions. Status: Complete. ECS Profiles. Buttons: Sync Data Extension, View History.
- Configure Content Selection Rules:** Set custom rules regarding displaying time of assets and exclusion rules. Button: Edit.
- Set Fallback Assets:** Select an alternate image for each asset class to display when no matching content is found for a subscriber. Button: Edit.

https://help.salesforce.com/articleView?id=mc_pb_einstein_content_selection.htm&type=0

A Completely Tailored Email for Every Recipient



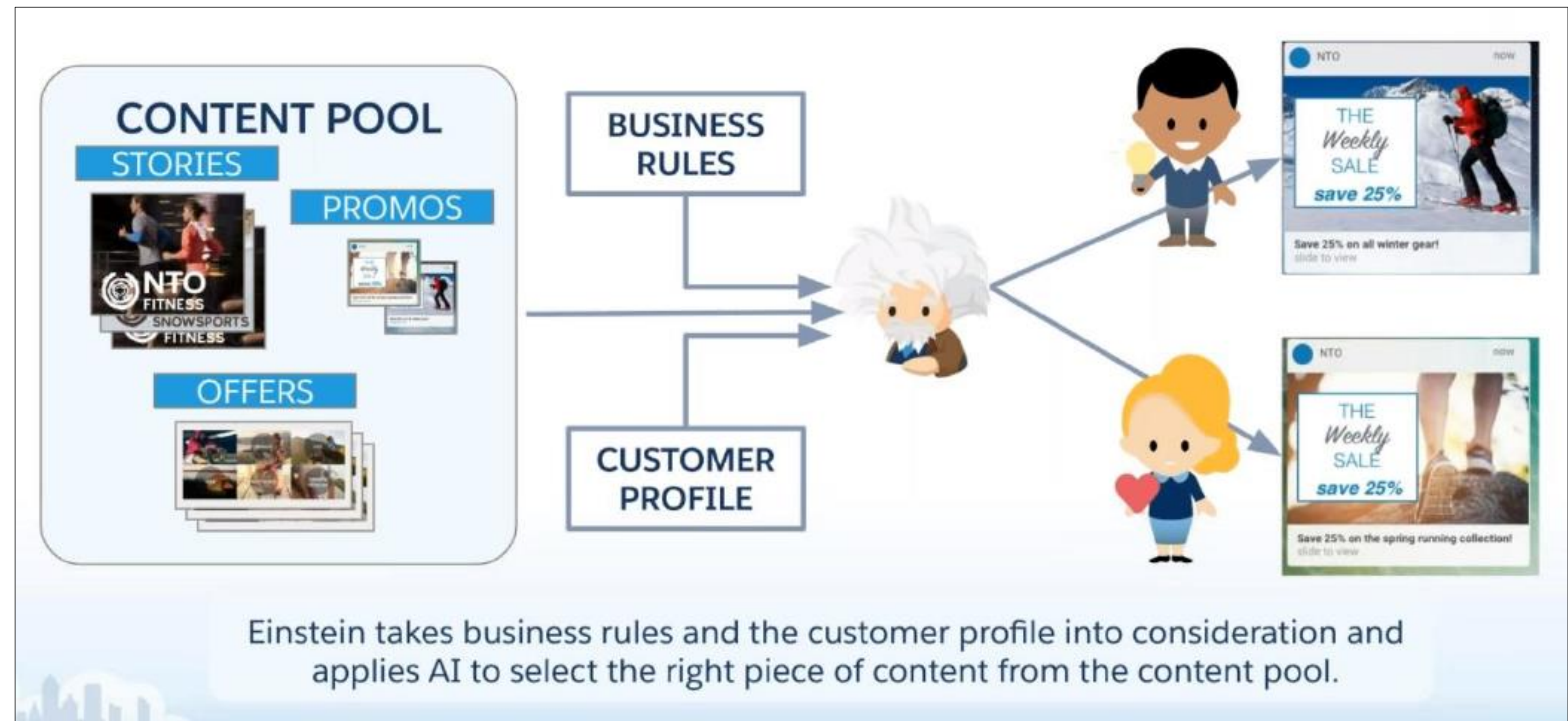
- + ECS takes known attributes to determine content allowing personalization at the one-to-one level
- + Like A/B testing, ECS can optimize a campaign in near real-time using AI

How it works

ECS uses business rules to determine which assets from your content pool to send to subscribers based on their customer profiles

Watch this overview to learn more:

<https://www.youtube.com/watch?v=dGTSeYh17pc>





ECS Enablement Considerations

DEDICATED DATA

ECS requires a dedicated data source within SFMC from which decision rules are driven.

01

CONTENT TAXONOMY

ECS requires content to be uploaded with certain dimensions of meta data that can be mapped back to profile attributes to serve the correct content. An upload template exists in the UI to simplify the process.

02

CONTENT VOLUME


Depending on level of customization, asset classes, dimensions of customer data, content volume may need to be increased at launch of platform or in support of certain campaigns & journeys.

03


From an editorial calendar of scheduled sends....

Subject Line: Don't Forget, F_Name! 🕒
Preheader: Before you set your clock back on Sunday, pay it forward.

Having trouble viewing this email? [View it online.](#)

 **DOING THE MOST GOOD** [DONATE](#)

FALL & PAY IT BACK FORWARD [GIF](#)



This Sunday, Nov. 3, marks the end of daylight saving time.



Before you set your clocks back an hour, **pay it forward by becoming a monthly donor to The Salvation Army.** It's easy to do—just set it, forget it, and feel good knowing that your reliable gifts will help us meet the most urgent needs in your community all year long.

[DONATE MONTHLY](#)

Another Way to Pay It Forward
Volunteer at a red kettle in your community and make a difference with every ring.

[REGISTER TO RING](#)

[FIND A LOCATION](#)


CONNECT WITH US
 


UNSUBSCRIBE | PREFERENCES | REQUEST PRAYER | VOLUNTEER | [GIVE TODAY](#)

The Salvation Army
Serving local communities across the Midwest
[CentralUSA.SalvationArmy.org](#)
5550 Prairie Stone Parkway, Hoffman Estates, IL 60192
Privacy Policy | Copyright 2019

Subject Line: We Can Hear the Bells 🔔
Preheader: No other sound says Christmas quite like the ring of a Salvation Army bell.

Having trouble viewing this email? [View it online.](#)

 **DOING THE MOST GOOD** [DONATE](#)




THE BELLS ARE BACK.

From its humble beginnings as a single crab pot collecting coins, the Red Kettle Campaign has grown into one of the most recognizable, important giving traditions in the U.S. Every year from November through Christmas Eve, the ubiquitous red buckets can be found outside thousands of storefronts across the country.

When you drop a donation into a kettle or give online, you are joining more than a century-long tradition of generosity.

[GIVE NOW](#)

[GIF](#)





DID YOU KNOW?

In 1891, the first red kettle provided Christmas dinner for 1,000 hungry people in San Francisco. Today, our red kettles help almost 25 million people nationwide every year.

Bell Ringers Needed
Volunteer at a red kettle in your community and make a difference with every ring.

[REGISTER TO RING](#)

[FIND A LOCATION](#)


CONNECT WITH US
 

UNSUBSCRIBE | PREFERENCES | REQUEST PRAYER | VOLUNTEER | [GIVE TODAY](#)


The Salvation Army
Serving local communities across the Midwest
[CentralUSA.SalvationArmy.org](#)
5550 Prairie Stone Parkway, Hoffman Estates, IL 60192
Privacy Policy | Copyright 2019

Subject Line: Do You Hear the Bells?
Preheader: Time's Running Out to Respond to Their Ring.

Having trouble viewing this email? [View it online.](#)

 **DOING THE MOST GOOD** [DONATE](#)

[GIF](#)




SOON IT WILL BE CHRISTMAS DAY

The bells are ringing and the kettles are calling through Christmas Eve. That means **there's only one week left** to fill them. Your donations provide essential services in %CityName% throughout the year.

Whether you give online or in person, the money collected enables The Salvation Army to bring the spirit of Christmas to those most in need.

[DONATE NOW](#)



EVERY DOLLAR MAKES A DIFFERENCE.


#FIGHTFORGOOD
ALL YEAR LONG

Make every day feel like Christmas with a sustaining gift. All it takes is \$25 a month to make a lasting impact on your community.

[GIVE MONTHLY](#)

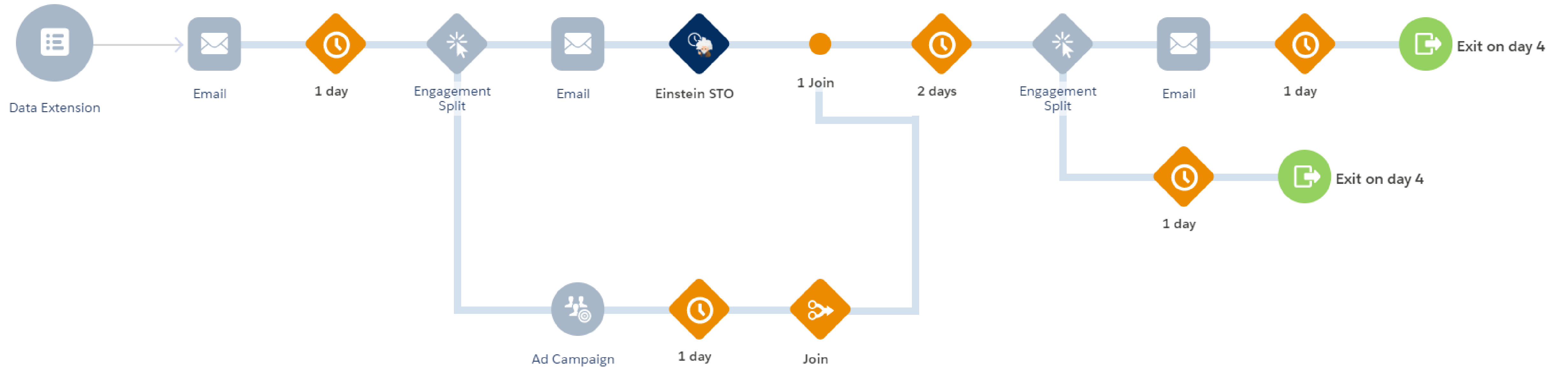
[FIND A LOCATION](#)

CONNECT WITH US
 

UNSUBSCRIBE | PREFERENCES | REQUEST PRAYER | VOLUNTEER | [GIVE TODAY](#)

The Salvation Army
Serving local communities across the Midwest
[CentralUSA.SalvationArmy.org](#)
5550 Prairie Stone Parkway, Hoffman Estates, IL 60192
Privacy Policy | Copyright 2019

.....To a complete journey with defined paths and decision splits





Remaining 2020 Calendar



Key for Overview

SEND DATES

29 30 31

THEMES

Theme Name

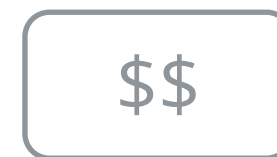
EXPECTED VALUE OF DONATIONS GENERATED

Low



Small Opportunity

\$\$



\$\$\$



High

\$\$\$\$



Large Opportunity

SECONDARY OBJECTIVES



Gather Volunteers



Appeal for Recurring Donation



Drive Engagement with Social Media



Promote Peer-to-Peer Fundraising

CHANNEL COORDINATION



TOOLS





















For example: Content Builder, Send Time Optimization, Journey Builder, Dynamic Content

TESTING



Opportunity exists to test messaging strategy to generate insights

Q4 FY2020 OVERVIEW

	JULY			AUGUST			SEPTEMBER					
SEND DATES	7	16	28	6	11	18	25	1	8	15	22	29
THEMES	Devotional	Food	Back to School			Devotional	Pathway of Hope		Devotional	Virtual Kettle	Volunteer Kickoff	
EXPECTED VALUE OF DONATIONS GENERATED		\$\$	\$\$				\$\$		\$\$\$			
SECONDARY OBJECTIVES									 			
CHANNEL COORDINATION									 			
TOOLKIT												
TESTING												

CAMPAIGN BRIEF – BACK TO SCHOOL

OVERVIEW

A series of emails focused on helping students be prepared for a successful school year.

TIMING

AUGUST

6TH
THURSDAY

AUGUST

11TH
TUESDAY

AUGUST

18TH
TUESDAY

GOALS

Drive revenue

Improve Inbox Placement

IMPACT

3

EFFORT

4

AUDIENCE

Sending to our normal audiences

Excluding divisions that don't have youth programs featured

MESSAGING

CONTEXT: School may look different in the Fall due to COVID-19 and families may need even more help with the strain school supply costs tend to take on families.

CORE: Donate today to help local students

CTA: Donate Now

TOOLKIT

- Salesforce Send Time Optimizer
- Interactive landing page

CHANNEL COORDINATION

Providing assets for social and web banners

TESTING

Test using Einstein Send Time Optimizer to see if we can improve open rates

REQUIREMENTS/DELIVERABLES

None – campaign is already approved

CAMPAIGN BRIEF – PATHWAY OF HOPE

OVERVIEW

To start September we will focus on the Pathway of Hope program and what makes it so successful.

TIMING

SEPTEMBER

1ST

TUESDAY

SEPTEMBER

8TH

TUESDAY

GOALS

Drive revenue – focus on recurring donations

Improve Inbox Placement

IMPACT

5

EFFORT

7

AUDIENCE

Sending to our normal audiences

Exclusions: N/A

MESSAGING

CONTEXT: This email series will give donors a look inside the program from both those receiving and those helping. We will feature a story illustrating the impact and explaining the program.

CORE: Recurring donations are the reason we can offer programs like this.

CTA: Dynamic ask with 4-CTAs based on previous gift amounts

TOOLKIT

- Recurring Asks

CHANNEL COORDINATION

Providing assets for social and web banners

TESTING

Test fundraising tactics planned for the holiday season such as micro-giving and using demographic information.

REQUIREMENTS/DELIVERABLES

- Need program details
- Link to landing pages

CAMPAIGN BRIEF – VIRTUAL KETTLE

OVERVIEW

Have your own virtual Red Kettle. With Red Kettle Season potentially looking different this year, the virtual option will be promoted through end of year.

TIMING

SEPTEMBER

22ND
TUESDAY

GOALS

Increase adoption of peer to peer giving.

Drive engagement cross-channel

Improve Inbox Placement

IMPACT

4

EFFORT

4

AUDIENCE

Sending to the full engaged file

MESSAGING

CONTEXT: Have your own Digital Kettle! We will provide peer to peer opportunities throughout the end of the year. See how you stack up vs others through a leaderboard and share info about where the money goes.

CORE: Increase adoption of peer to peer giving.

CTA: Donate Now

TOOLKIT

Peer to Peer Landing Page

Optional: Snapchat filter and leaderboard functionality

CHANNEL COORDINATION

Providing assets for social and web banners

TESTING

Testing P2P copy to increase adoption

REQUIREMENTS/DELIVERABLES

- Need program details
- Link to landing pages

CAMPAIGN BRIEF – VOLUNTEER KICKOFF

OVERVIEW

Red Kettle volunteering kick off announcing ability to reserve their spot. Educating about increased safety due to COVID-19. Secondary volunteer zones will only be shown to those most likely to volunteer.

TIMING

SEPTEMBER

29TH
TUESDAY

GOALS

Recruit Red Kettle volunteers
Drive engagement cross-channel
Improve Inbox Placement

IMPACT

5

EFFORT

5

AUDIENCE

List of volunteers from 2018-2019

MESSAGING

CONTEXT: Volunteers can reserve a spot. For those afraid to ring, we will inform them of safety measures and offer micro-volunteer opportunities.

CORE: Volunteer and reserve your spot.

CTA: Reserve your spot

TOOLKIT

Einstein Send Time Optimizer
Einstein Content Selection enabled

CHANNEL COORDINATION

Providing assets for social and web banners

TESTING

Landing page to reduce bounce rate
Review of past volunteers for segmentation rules

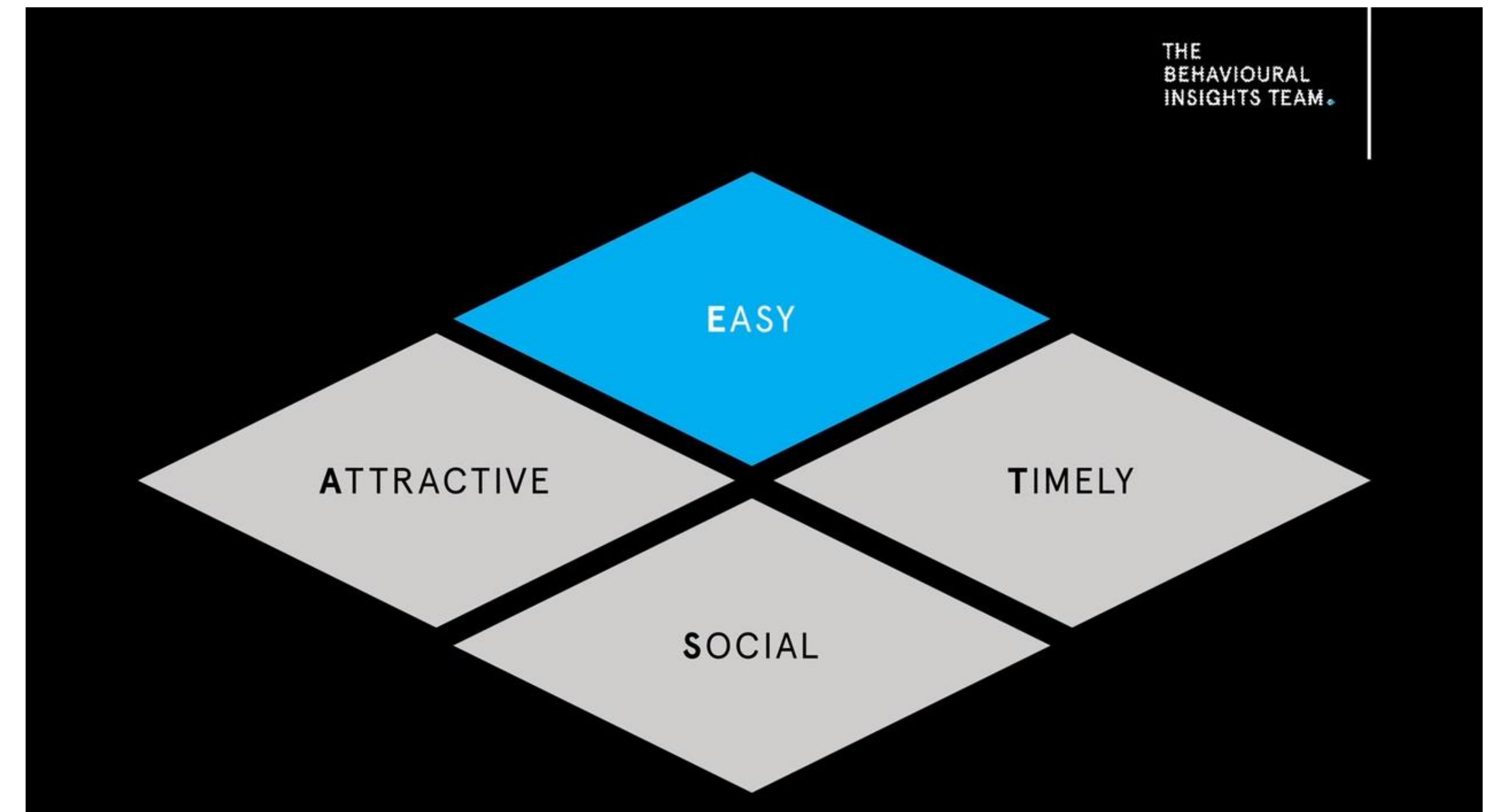
REQUIREMENTS/DELIVERABLES

- List of past volunteers for segmentation and analysis
- Link to volunteer page

VOLUNTEERING

Make Volunteering Easy

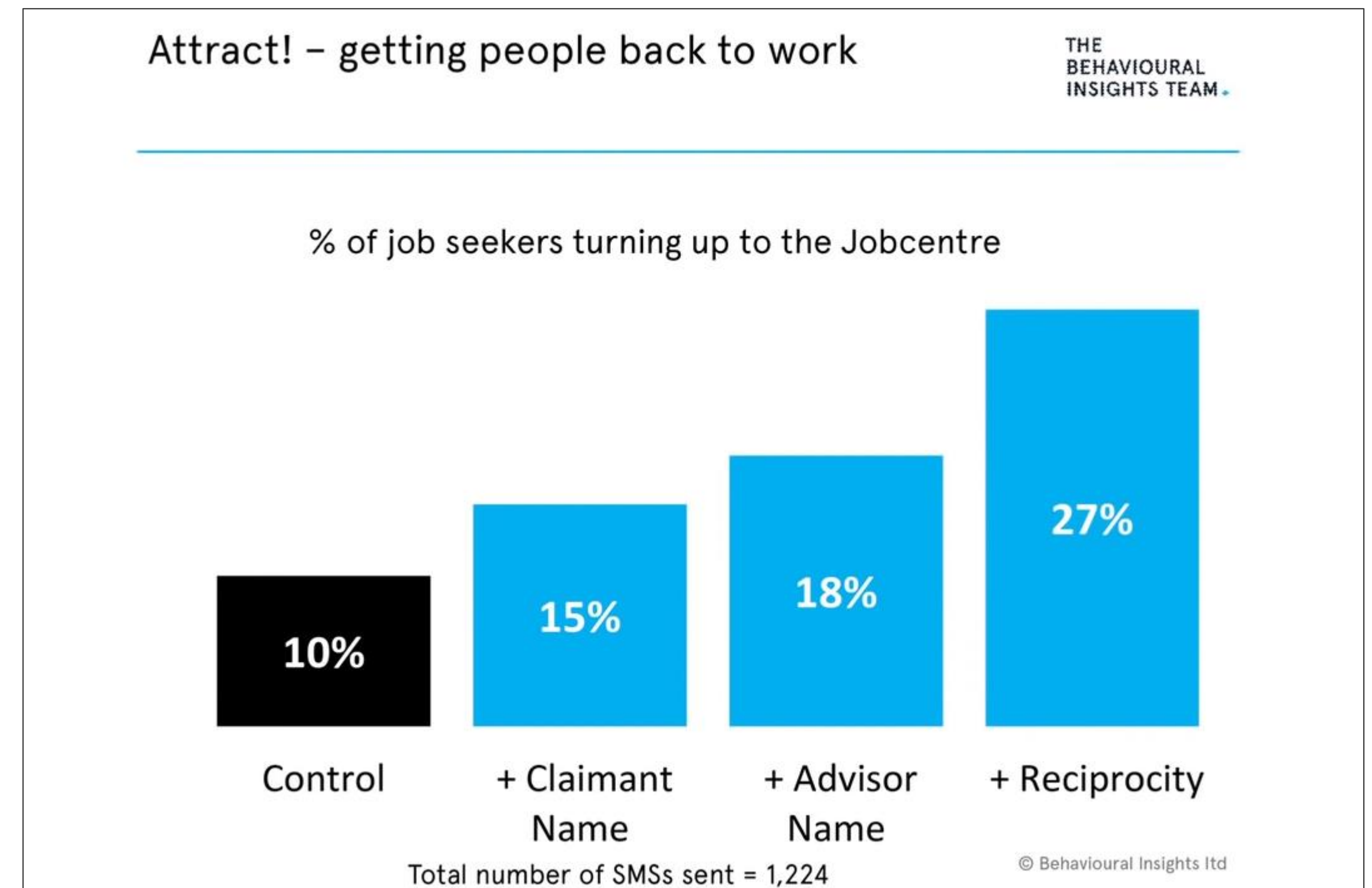
- + According to Dr. David Halpern if you want to effect behavior look to E.A.S.T.
 - Easy
 - Attractive
 - Social
 - Timely
- + <https://www.youtube.com/watch?v=y7b2Uj0BLXc>



VOLUNTEERING

Increasing Conversion

- + Use past volunteering data to personalize the experience
 - Suggest similar volunteering opportunities
 - Link to specific pages to reduce steps
- + Personalize the asks
 - “[First_name], we’ve saved your spot”
 - “[First_name}, we’ve selected this opportunity just for you”
 - Humanize the send – either from the head of volunteering or mentioning who they’ll interact with after signing up



Early Q1 Secondary Content

VOLUNTEERING

- + Secondary zone will be visible to past volunteers
- + Asking for Red Kettle volunteering
- + Zone will appear in emails through October and early November
- + Once a subscriber opens 3 emails with the content zone, they will then be shown the peer-to-peer zone

PEER-TO-PEER / VIRTUAL KETTLE

- + Secondary zone will be visible to all non-volunteers
- + Asking for subscribers to start their own peer-to-peer campaign
- + Zone will appear in emails through October and early November
- + Once a subscriber opens three emails with the content zone it will no longer appear

Having trouble viewing this email? [View it online.](#)

THE SALVATION ARMY DOING THE MOST GOOD [DONATE](#)

9 HABITS OF HIGHLY SUCCESSFUL VOLUNTEERS

To be successful at something like volunteering may seem counterintuitive as it's more about giving freely than being "good" at something.

But volunteering is like everything else in life: You get out of it what you put into it. Why not work to make the most impact possible and develop habits that make the biggest difference for you and others?

If you choose to cultivate these nine habits that successful

[KEEP READING](#)

[FIND VOLUNTEER OPPORTUNITIES NEAR YOU](#)

CAN VOLUNTEERING WARD OFF DEPRESSION?

Volunteering may not be a magical cure-all, but it can spark a useful shift in perspective.

[READ THE STORY](#)

[DONATE](#)

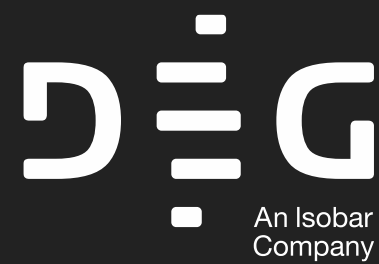
Bell Ringers Needed
Volunteer at a red kettle in your community and make a difference with every ring.

[VOLUNTEER TO RING](#)

Bell Ringers Needed
Volunteer at a red kettle in your community and make a difference with every ring.

[VOLUNTEER TO RING](#)

FY21 Q1 Overview



+



CAMPAIGN OUTLINE – NEWLY POOR

OVERVIEW

Illustrate how we address the newly poor, those affected by COVID-19 pandemic, from cycling into future generations through years of experience breaking the cycle.

TIMING

OCTOBER 13th TUESDAY	OCTOBER 20th TUESDAY	OCTOBER 27th TUESDAY
---	---	---

GOALS

- 1) Drive Recurring donations
- 2) Recruit Red Kettle Volunteers
- 3) Recruit Virtual Red Kettle Fundraisers

IMPACT

5

EFFORT

5

AUDIENCE

SEND TO: Sending to our normal audience building up to last engagement being one year prior

EXCLUDE: TBD

MESSAGING

CONTEXT: Positive series as people are stressed due to economic uncertainty/election stress. Will speak to people who want action instead of words. Will also provide a secondary zone to promote local events

CORE: Illustrate how TSA programs are helping the new poor

CTA: Give monthly to help break the cycle of poverty in your community

TOOLKIT

- Einstein Content Selector
- Use subscriber history to dynamically populate ask amounts

CHANNEL COORDINATION

TESTING

Use of Einstein Content Selection to promote volunteering and Virtual Red Kettle

REQUIREMENTS/DELIVERABLES

- Link to donations pages
- Content and programs to feature
- Division specific content - events
- Building dynamic zone with 4 CTAs – will be available for future THQ and Ad Hoc sends

CAMPAIGN OUTLINE – FALL BACK, PAY IT FORWARD

OVERVIEW

We will use the time change as a recurring giving opportunity – never forget to give again.

TIMING

NOVEMBER

1st

TUESDAY

GOALS

Drive recurring donations

IMPACT

3

EFFORT

4

AUDIENCE

SEND TO: Full engaged audience

EXCLUDE: Current sustainers

MESSAGING

CONTEXT: One of the better performing emails of 2019, we will pull in messaging from the stop the cycle campaign to explain the why.

CORE: Never forget to give again by signing up to be a monthly donor

CTA: Donate Monthly Today

TOOLKIT

Einstein Content Selector for Virtual Kettle or Volunteering

CHANNEL COORDINATION

TESTING

Ask amounts – would require two creative versions

REQUIREMENTS/DELIVERABLES

- Work with Classy on auto-upgrading recurring gifts & upgrading recurring donors

CAMPAIGN OUTLINE – COMMUNITY & UNITY

OVERVIEW

Election “stress” and tension will likely still be alive post the November 3rd election. Salvation Army’s community involvement is ongoing regardless of election outcomes.

TIMING

NOVEMBER

10th
TUESDAY

GOALS

Drive donations

Communicate Local Needs

IMPACT

5

EFFORT

5

AUDIENCE

SEND TO: Full engaged audience

EXCLUDE: N/A

MESSAGING

CONTEXT: While our world seems to fracture into red vs blue, The Salvation Army continues to help those in need within our communities. Secondary zone will promote local events.

CORE: Stories and landing pages about community involvement to be that escape immediately following the election

CTA: Give now to help those in need and improve our communities

TOOLKIT

Einstein Content Selector for:

- Virtual Kettle or Volunteering based on ?
- localized content – footer button linking to local stories

CHANNEL COORDINATION

Expect divisional social coordination

TESTING

Use of local messaging to spur donations

REQUIREMENTS/DELIVERABLES

- Exclude going to Corp level – staying at divisional level
- Link to 2 stories and landing pages
- Division level copy and/or video

CAMPAIGN OUTLINE – RED KETTLE KICKOFF

OVERVIEW

Announce the start of Red Kettle Season two days before the Thanksgiving Day Halftime Kickoff Ceremony (Cowboys vs Redskins - if there's NFL)

TIMING

NOVEMBER

12th
THURSDAY

GOALS

Drive Engagement

IMPACT

3

EFFORT

4

What happens if there is not a game?

AUDIENCE

SEND TO: Full engaged audience

EXCLUDE: N/A

MESSAGING

CONTEXT: It's finally here! Hear the bells throughout the community and see the impact your donations make.

CORE: Red Kettle Season is here! A donation today stays local and helps a neighbor in need.

CTA: Virtual Red Kettle & Red Kettle History

TOOLKIT

Einstein Send Time Optimizer

CHANNEL COORDINATION

Providing social assets

TESTING

Subject line testing to increase awareness

REQUIREMENTS/DELIVERABLES

- Incorporate Red Kettle History and trivia
- Landing pages and digital Red Kettle

CAMPAIGN OUTLINE – GIVING TUESDAY PREVIEW

OVERVIEW

Giving Tuesday is on December 1st, 2020. Messaging in November is meant to get donors to participate early or pre-commit to giving to The Salvation Army

TIMING

NOVEMBER

17th
TUESDAY

NOVEMBER

24th
TUESDAY

GOALS

Drive revenue

Establish pre-commitments from as many subscribers as possible

IMPACT

5

EFFORT

5

AUDIENCE

SEND TO: Entire audience. Appeal to anyone who donated last year to get involved this year – how much the gifts helped

EXCLUDE: N/A

MESSAGING

CONTEXT: Get ready, Giving Tuesday is nearly here!

CORE: unlock” match/seed money (if available)

CTA: Don’t miss out – save the date

TOOLKIT

- Gamification
- Micro-giving
- Dynamic ask amounts
- Save-to-calendar function

CHANNEL COORDINATION

Working with our social team to establish a social playbook

TESTING

Content & Personalization

REQUIREMENTS/DELIVERABLES

- Match or seed money
- Crowdfunding pages
- Testimonials

CAMPAIGN OUTLINE – THANKSGIVING

OVERVIEW

Thanksgiving holiday is a time to remember our blessings and gather with family. Thank donors, volunteers, employees, and our community for their support

TIMING



GOALS

Engagement

IMPACT

2

EFFORT

3

AUDIENCE

SEND TO: Full engaged audience

EXCLUDE: N/A

MESSAGING

CONTEXT: Thank donors, volunteers, employees, and our community for their support

CORE:
Testimonial from people helped

CTA: N/A

TOOLKIT

N/A

CHANNEL COORDINATION

Social?

TESTING

N/A

REQUIREMENTS/DELIVERABLES

- Link to volunteer pages
- Testimonials or note from someone within the org (or influencer)
- Brainstorm consideration – recipes we're feeding at our shelters

CAMPAIGN OUTLINE – GIVING TUESDAY

OVERVIEW

Giving Tuesday is on December 1st, 2020. We will be driving as much revenue as possible through multiple sends over Giving Tuesday and the day after.

TIMING

DECEMBER 1st TUESDAY MORNING	DECEMBER 1st TUESDAY AFTERNOON	DECEMBER 2nd WEDNESDAY
---	---	--

GOALS

A minimum of 10% more revenue from 2019

IMPACT

9

EFFORT

8

AUDIENCE

SEND 1 – Full engaged audience

SEND 2 – Anyone who didn't click in email 1

SEND 3 – Thank you to all

EXCLUDE: N/A

MESSAGING

CONTEXT: We did it! Unlocked match opportunity is here!

CORE – SEND 1: Feature people helped, Goal Progress
CTA – SEND 1 Donate Now

CORE – SEND 2: Feature people helped, Goal Progress
CTA – SEND 2: Donate Now (use smaller amounts)

CORE – SEND 3: Thank you and feature how communities will be impacted
CTA – SEND 3: Don't miss out - Donate Now

TOOLKIT

- Dynamic ask amounts based on donator history or mosaic averages

CHANNEL COORDINATION

Coordinate with web, social, and paid assets

TESTING

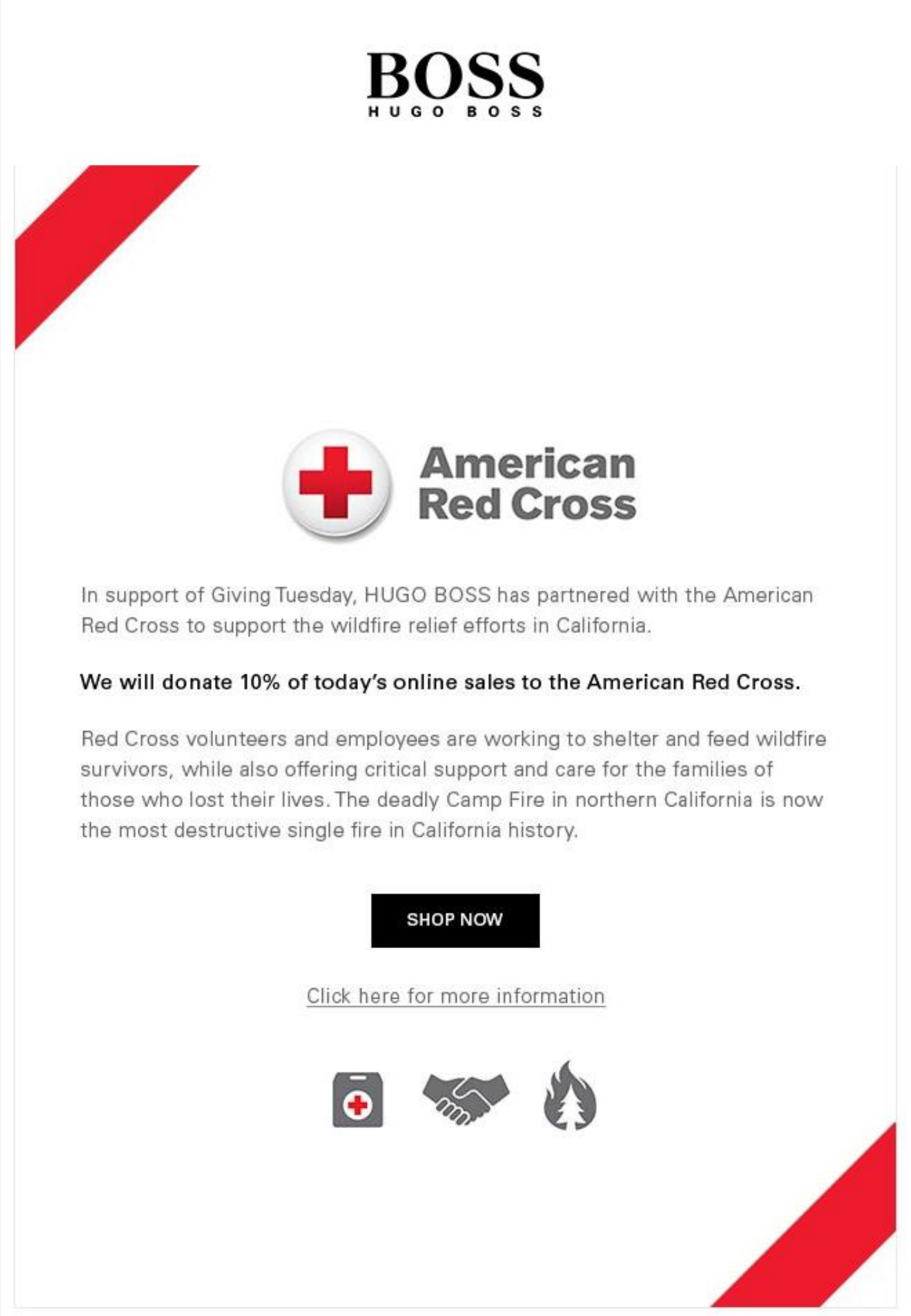
Dynamic asks

REQUIREMENTS/DELIVERABLES


- Match or seed money
- Landing pages
- Testimonials
- Quantify what amounts mean to each community
- Partners to send on our behalf

Partnerships

- + 2020 has become a tipping point in for-profit brands jumping into speaking up for communities
- + Giving Tuesday has recently been a day many for-profit brands have participated by either promoting their efforts or directing their customers to donate to selected charities
- + Finding for profit brands to send on our behalf or recommend their customers donate would help us grow our list for free and generate more revenue
- + We will provide talking points for speaking to for-profit brands and creative assets to make helping easier than ever



BOSS
HUGO BOSS




In support of Giving Tuesday, HUGO BOSS has partnered with the American Red Cross to support the wildfire relief efforts in California.

We will donate 10% of today's online sales to the American Red Cross.

Red Cross volunteers and employees are working to shelter and feed wildfire survivors, while also offering critical support and care for the families of those who lost their lives. The deadly Camp Fire in northern California is now the most destructive single fire in California history.

[SHOP NOW](#)

[Click here for more information](#)





Making Partnership Easy

DEDICATED SEND

- + For those fully committed, we will provide an entire email creative ready to drop a brand's logo into
 - + Depending on the size of the opportunity, we can also help customize the email
 - + This asset would then be sent from the brand and linked to a dedicated Giving Tuesday Classy page
-

CONTENT BLOCK / BANNER

- + For brands willing to add in messaging to their currently scheduled content we will provide a content block that can be added to an existing email
 - + This content block will be editable to add a brand's logo and direct subscribers to a dedicated classy landing page
 - + For those who want a simpler or smaller message, we will have a banner or copy options
 - Banner option will also work well on websites
-

SOCIAL

- + In addition to email and web assets, we will be providing social assets for brands
 - + We will have options for the three largest social platforms – Facebook, Instagram, and Twitter
 - + In addition to assets, we will provide a dedicated Classy donation page
-

CAMPAIGN OUTLINE – VIRTUAL ANGEL TREE

OVERVIEW

TSA's Angel Tree program provides new clothing or toys for children of needy families through the support of donors. A virtual version of this program may be required due to the pandemic situation.

TIMING

DECEMBER

8th

THURSDAY

DECEMBER

15th

TUESDAY

GOALS

Drive Donations online or at kettle

IMPACT

7

EFFORT

6

AUDIENCE

SEND TO: Full engaged audience

EXCLUDE: N/A

MESSAGING

CONTEXT: Allow the donor to pick from a few options selected specifically for them based on past gift amounts.

CORE: Speak generally of “gifts” – for example \$30 means warmth (coat) for someone in need

CTA: Be an Angel

TOOLKIT

- Use mosaic and historical gift information to determine suggested gift amounts
- Zembula – online scratch-off capabilities

CHANNEL COORDINATION

Social – share with others

TESTING

Interactive campaign

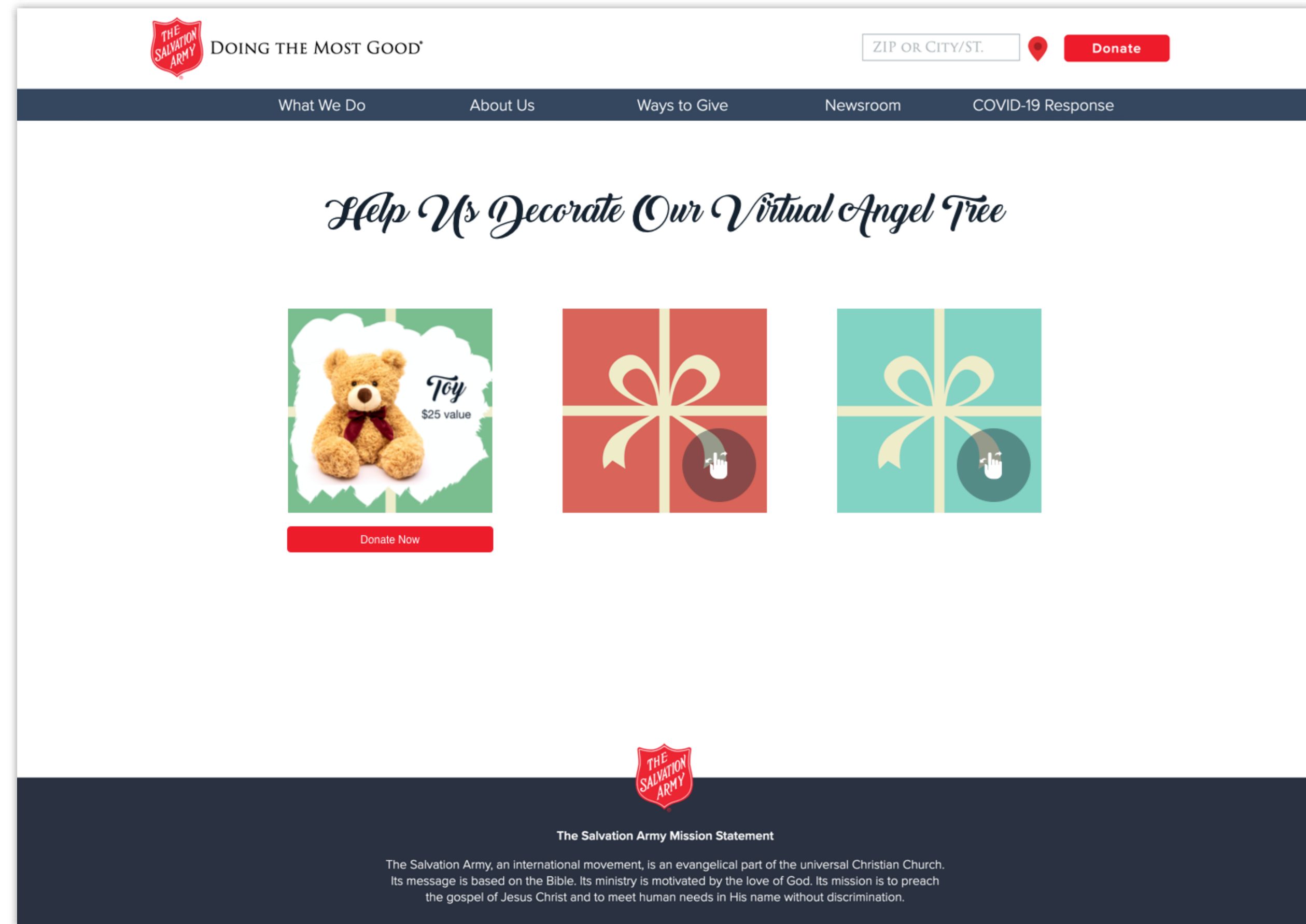
REQUIREMENTS/DELIVERABLES

- Landing page
- Programs to feature at selected gift levels

Initial Concept



Email



Landing Page

Additional Opportunities: Progress Bar



CAMPAIGN OUTLINE – KETTLE SHORTFALL

OVERVIEW

Urgent appeal to donate due to the Kettle Revenue being down. This campaign will focus on driving donations and explaining where Kettle funds go.

TIMING

DECEMBER 17th THURSDAY	DECEMBER 22nd TUESDAY
---	--

GOALS

Drive Donations

IMPACT

3

EFFORT

4

AUDIENCE

SEND TO: Full engaged audience

EXCLUDE: N/A

MESSAGING

CONTEXT: Urgent appeal to donate – will test local messaging impact and donation appeals to maximize revenue

CORE: Maximize donations through personalization & local information

CTA: Donate Today

TOOLKIT

Dynamic Content

CHANNEL COORDINATION

TESTING

Dynamic Content & Personalization

REQUIREMENTS/DELIVERABLES

- Progress bar
- Link to Digital Red Kettle

CAMPAIGN OUTLINE – CHRISTMAS

OVERVIEW

The Salvation Army is both a charity and a church. Each Christmas we take time to celebrate the birth of Jesus and spread the Christmas story.

TIMING

DECEMBER

24th
THURSDAY

GOALS

Engagement
Spreading the gospel

IMPACT

2

EFFORT

3

AUDIENCE

SEND TO: Full engaged audience

EXCLUDE: N/A

MESSAGING

CONTEXT: The Salvation Army is a Christian Church and we will be celebrating the birth of Christ with our subscribers. Sending on the 24th to keep Christmas Day free from distractions for our subscribers.

CORE: Minimal, simple content and creative

CTA: Read the Christmas Story or Join Us for Mass

TOOLKIT

- N/A

CHANNEL COORDINATION

Social assets will be provided

TESTING

N/A

REQUIREMENTS/DELIVERABLES

- Landing page with the Christmas Story
- Link to Online Mass Services

CAMPAIGN OUTLINE – END OF YEAR

OVERVIEW

December 31st is the last day to donate to a charitable cause and include that amount as a tax write-off. Under the CARES Act that resulted from the COVID pandemic, tax benefits from charitable giving have been increased.

TIMING

DECEMBER 28th MONDAY	DECEMBER 29th TUESDAY RESEND	DECEMBER 30th WEDNESDAY	DECEMBER 31st TUESDAY
--	--	---	---

GOALS

Drive Donations

IMPACT

9

EFFORT

4

AUDIENCE

SEND TO: Full engaged audience

EXCLUDE: After the first send, anyone who clicks within an email will be excluded from future sends.

MESSAGING

CONTEXT: Many people make charitable contributions at the end of year either due to habit or to help with their taxes.

CORE: It's not too late to give in 2020. Have you maxed out your tax deduction?

CTA: Donate NOW

Each send will contain an urgent appeal. One send will feature local messaging. Each send will be shorter and more urgent than the one previous.

TOOLKIT

- Dynamic asks based last donation date
- Header based on donor status to spur action
- Pull in copy based on previous donation amount. 3 groups – no donation, previous small donation, previous large donation – only change will be copy
- Journey Builder to utilize send-time optimization

CHANNEL COORDINATION

Social assets will be provided

TESTING

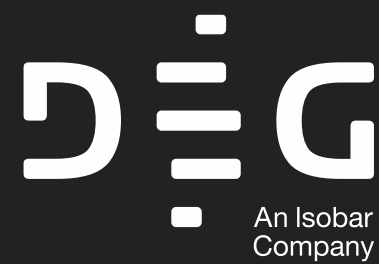
Einstein Send Time Optimizer

REQUIREMENTS/DELIVERABLES
















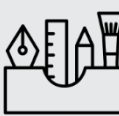


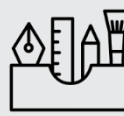






- Links to donation pages
- TSA's perspective on tax credit
- Reference FY2020 wrap up email for direction



FY21 Q2 Overview



Q2 FY2021 OVERVIEW

	JANUARY				FEBRUARY				MARCH			
SEND DATES	5	12	19	26	2	9	16	23	4	9	11	13
THEMES	Year Recap / Thank You	Volunteer in 2021	Devotional	Recurring Ask	Black History Month		Devotional	EDS Volunteer	COVID-19 Anniversary		Connector Blackout	
EXPECTED VALUE OF DONATIONS GENERATED	\$	\$		\$\$	\$			\$	\$\$\$			
SECONDARY OBJECTIVES												
CHANNEL COORDINATION					 	 			 	 		
TOOLKIT												
TESTING												

CAMPAIGN OUTLINE – YEAR RECAP & THANK YOU

OVERVIEW

Personalized thank you to engage subscribers within the new year. We will illustrate The Salvation Army's impact in their community.

TIMING

JANUARY
5th
TUESDAY

GOALS

Ensure supporters feel acknowledged and appreciated

Get people excited to engage more in 2021

IMPACT
6

EFFORT
6

AUDIENCE

SEND TO: Full engaged audience

EXCLUDE: N/A

MESSAGING

CONTEXT: Get people excited to be even more involved in 2021. Potentially add a video from the influencer thanking supporters.

CORE: Highly personalized thank you to engage subscribers

CTA: Become a monthly donor or volunteer in 2021!

TOOLKIT

- Dynamic Content & Personalization

CHANNEL COORDINATION

Social – share with others

TESTING

Personalized content – trying to determine which stats make a difference

REQUIREMENTS/DELIVERABLES

- Dynamic Content & Personalization rules
- Like Nest, compare someone's impact to those around them
- Top programs per division
- Amount donated vs others

CAMPAIGN OUTLINE – VOLUNTEER IN 2021

OVERVIEW

Volunteering more is a common goal, especially among the younger subscribers. This campaign is a refreshed version of the 2019 version that had the highest engagement of all Q2 sends.

TIMING

JANUARY

12th
TUESDAY

GOALS

Get subscribers engaged and committed early in 2021

IMPACT

3

EFFORT

4

AUDIENCE

SEND TO: Full engaged audience

EXCLUDE: Any subscribers who have indicated they aren't interested in volunteering

MESSAGING

CONTEXT: Reaching out to subscribers to entice them to volunteer, provide resources to find opportunities near the reader, and offer micro-volunteering opportunities. We will also mention employer matching opportunities.

CORE: Get more involved in your community through volunteering

CTA: Volunteer today

TOOLKIT

- Einstein Send Time Optimizer

CHANNEL COORDINATION

Will provide social assets

TESTING

Subject line testing to increase audience

REQUIREMENTS/DELIVERABLES

- List of past volunteers and their roles
- Links to volunteer pages

CAMPAIGN OUTLINE – RECURRING ASK

OVERVIEW

Support your community through a recurring donation. Commit to a small amount per month and you'll never forget to give again.

TIMING

JANUARY

26th
TUESDAY

GOALS

Convert subscribers into recurring donors

IMPACT

4

EFFORT

5

AUDIENCE

SEND TO: Full engaged audience

EXCLUDE: Recurring donors and one-time donors least likely to convert

MESSAGING

CONTEXT: Increase number of recurring donors through testing small donation appeals and copy targeting subscribers who didn't give in 2020. Second zone speaks to employer matching.

CORE: Resolve to help you community in 2021 through a monthly donation

CTA: Donate Monthly

TOOLKIT

- Dynamic content based on previous gift date

CHANNEL COORDINATION

- N/A

TESTING

Different tactics to increase recurring conversion

REQUIREMENTS/DELIVERABLES

- List of recurring donors to exclude

CAMPAIGN OUTLINE - Black History Month

OVERVIEW

The Salvation Army doesn't discriminate and is actively trying to improve underserved communities. This is a two-part series celebrating Black History Month

TIMING

The timing section features two calendar icons. The first icon is for February 2nd, Tuesday, and the second icon is for February 9th, Tuesday. Both icons are dark grey with white text and a light blue border.

GOALS

Engagement

IMPACT

3

EFFORT

4

AUDIENCE

SEND TO: Default (6 month) engaged audience

EXCLUDE: N/A

MESSAGING

CONTEXT: Spread messages of love and unity - Maya Angelou "We're all part of the human family." Feature prominent African Americans within The Salvation Army history and programs designed to improve communities.

CORE: The Salvation Army doesn't discriminate and is actively trying to improve underserved communities

CTA: Links to Content

TOOLKIT

- Einstein Send Time Optimizer

CHANNEL COORDINATION

- Social assets will be provided

TESTING

N/A

REQUIREMENTS/DELIVERABLES

- Information on programs and content to feature
- Landing pages to continue conversation

CAMPAIGN OUTLINE – EDS VOLUNTEER

OVERVIEW

Become a disaster volunteer to help your community when they need you most. Be prepared with our EDS handbook.

TIMING



GOALS

Increase number of EDS Volunteers
Engagement

IMPACT

3

EFFORT

4

AUDIENCE

SEND TO: Full engaged audience

EXCLUDE: EDS certified volunteers

MESSAGING

CONTEXT: Encourage EDS Volunteer signups. This is a refresh of one of our most engaging sends over the past two years.

CORE: Be there when your community needs you most!

CTA: Become an EDS Volunteer or cover the cost to train a volunteer

TOOLKIT

- Einstein Send Time Optimizer

CHANNEL COORDINATION

- Social tie in

TESTING

- Subject Line Copy to increase audience

REQUIREMENTS/DELIVERABLES

- List of EDS certified volunteers
- Timing and content from EDS team
- EDS Stats
- Cost to train a volunteer

CAMPAIGN BRIEF – COVID-19 Anniversary

OVERVIEW

Over 100,000 Americans have died, millions lost jobs, and The Salvation Army was there providing meals, shelter, and assistance to help

TIMING

MARCH 4th THURSDAY	MARCH 9th TUESDAY	MARCH 11TH THURSDAY
---------------------------------	--------------------------------	----------------------------------

GOALS

Engagement – Opens and Clicks

IMPACT

EFFORT

AUDIENCE

SEND TO: First send to Full engaged file. Rest of sends to default (6 month) engaged audience

EXCLUDE: N/A

MESSAGING

CONTEXT: Message donors who gave in 2020 – recap of the pandemic and how TSA responded. See how we prepare for major events and why we were ready

CORE: Over 100,000 Americans have died, millions lost jobs, and The Salvation Army was there providing meals, shelter, and assistance to help

CTA: Links to content

TOOLKIT

- Dynamic Content Personalization

CHANNEL COORDINATION

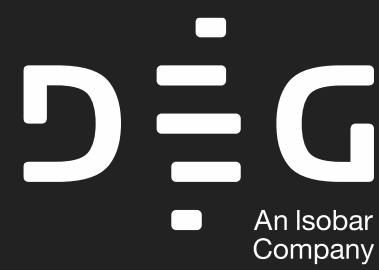
TESTING

TBD

REQUIREMENTS/DELIVERABLES

- Updated Response Numbers
- EDS Information
- Local response stories to personalize messaging.

Testing



+





Testing Metrics and Objectives

- What combination(s) yield the highest
 - ...open rate?
 - ...engagement rates?
 - ...conversion rates?
 - ...retention rates?
- According to a variety of objectives
 - ...acquiring net new donors
 - ...acquiring repeat donors
 - ...increasing donation amount
 - ...converting donors to sustained givers
 - ...recruiting volunteers
 - ...generating a social media following
 - ...etc.



Testing Variables



OUR AUDIENCE

(Segmentation)

- Demographics
- Donor History
- Volunteer
- Interests/Passions
- + *more*

OUR PURPOSE

(Objectives)

- Donate!
- Peer to Peer
- Volunteer Recruiting
- Save the Date
- Impact – Update
- EDS – immediate and future
- + *more*

OUR CONTENT STRATEGY

(Messaging)

- Subject Line
- Length
- Cause and Impact
- Localization
- + *more*

OUR PLAN

(Timing)

- Series
- Journeys
- Giving Tuesday
- Holidays
- + *more*

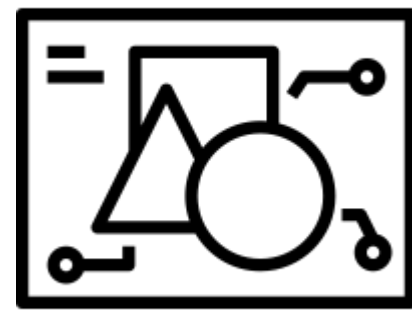




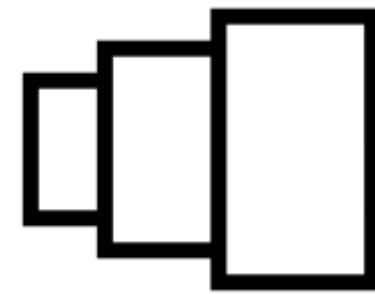
Testing Approach



ARTICULATE
HYPOTHESES



DESIGN
TESTS



CREATE
VERSIONS



DEPLOY
MESSAGES



ANALYZE
PERFORMANCE

LEVEL OF EFFORT





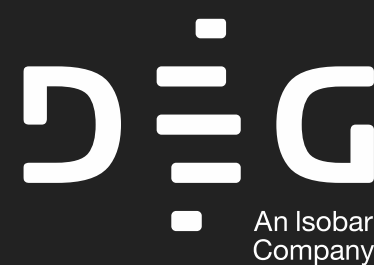
Central Territory 2021 Testing

FIVE TOPICS OF FOCUS

- + Impact of Personalization
 - + Incorporating Local Content
 - + Best way to utilize stories
 - + Improving CTA and Lowering Bounce Rate
 - + Segmentation
-



Nudge Techniques to Improve Conversion



+



“My mantra is if you want to help people accomplish some goal, make it easy.”

RICHARD H. THALER



Donor Motivation

IMPULSIVE GIVING

- + Quick gifts involving little analysis but rapid and positive emotional feedback

 - + Examples:
 - Disaster Giving
 - Reacting to community needs
 - Peer-to-peer
 - Micro-giving
-

DELIBERATE GIVING

- + Thoughtful contributions that resist the temptation of fast, feel-good donor experiences and more deeply account for the recipient of the aid and its results

 - + Examples:
 - End of Year
 - Planned Giving
 - Corporate / Major Gifts
-



NUDGE DEFINITION

A nudge, as we will use the term, is any aspect of the choice architecture that alters people's behavior in a predictable way without forbidding any options or significantly changing their economic incentives



Impulsive Giving

A significant portion of charitable donations come from impulse **donors responding quickly to feelings of generosity**. These acts of giving provide **fast and easy emotional satisfaction**. Impulsive donors are usually reacting to an appeal rather than considering long-term donation plans or carefully evaluating charity recipients

Impulsive giving is rooted in emotion





Impulsive Giving Objectives



- + Ensure appeals are rooted in generating an emotional response
 - + Make the experience immediately rewarding
 - + Make the experience as easy and fast as possible
 - + Aim for many smaller donations instead of singular larger gifts
-



Impulsive Nudge Techniques

MAKE DONATIONS EASY

- + Text to give instead of forms
 - Offer alternative giving options such as Apple or Google pay
 - + Mobile friendly forms to reduce load times
 - + Pass through parameters to reduce number of fields
 - + Reduce the number of options
-

MAKE GIVING FEEL REALLY GOOD

- + Reduce the delay between the donation and the reward (seeing the impact / thank you)
 - + Build on the initial feeling by continued education on their impact – extend the warm glow feeling
 - + Reinforce the beliefs that caused the donation
-

SPOTLIGHT SOCIAL NORMS

- + Illustrate how many others are making donations – especially people like them or around them
 - + Show average gifts to people giving less than average
 - + Explain how frequently people give to people past the average time
 - + Give donors a small but highly visible gift to show their support to others
-



Impulsive Nudge Techniques Part II

PRIME THE RIGHT IDENTITY

- + Remind donors of their previous gifts – priming them as donors
 - + Adjust tone to speak to aspirational donor motivations
 - + Pre-thank subscribers for getting involved or donating
 - + Frame the donors as someone who “wouldn’t let __ happen”
-

EMPHASIZE DIFFERENT ATTRIBUTES

- + Make legacy programs feel new by speaking to different attributes
 - + Promote new urgency or need
 - + Point out secondary or tertiary benefits from programs – such as food programs promoting social engagement and community
-

PAIR SHORT- & LONG-TERM BENEFITS

- + Link consumption with giving
 - + Offer pausing marketing with a donation
 - + Gamify the giving experience pushing donors into sustainers
 - + Offer sustaining donors the ability to automatically increase gifts overtime
 - + Offer the ability to commit to a gift at a later date
-



SEASONAL GIVING

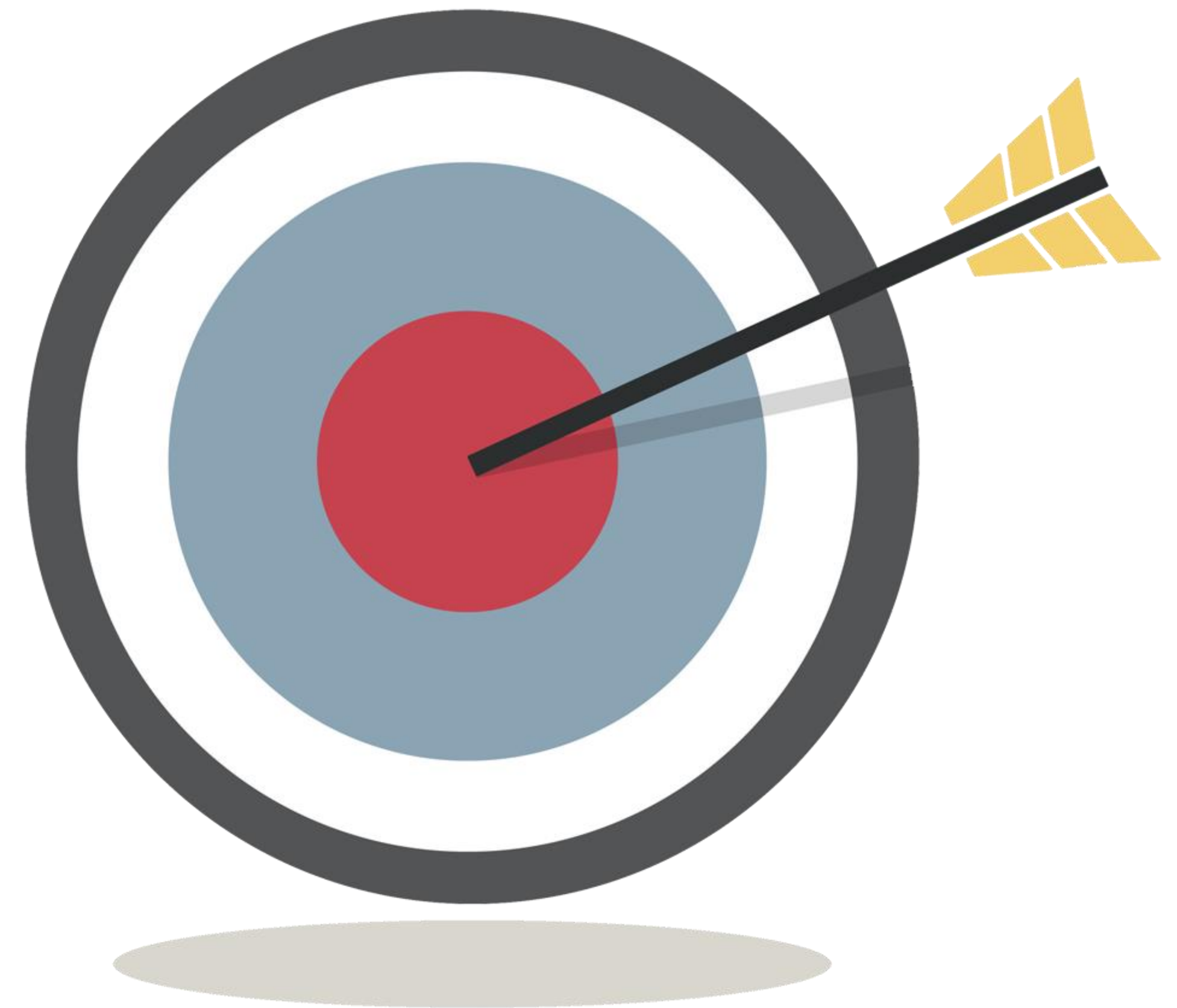
Habitual giving is also impulsive in that it traditionally is done without much research or second guessing. The same techniques mentioned will help retain habitual donors.



Deliberate Giving

Giving as a deliberate, planned action looks more like the way someone might engage in good-for-you behaviors, like planning for retirement, going to the gym, eating well, or recycling. These types of behaviors **aren't done automatically**, resisting the brain's tendency to use mental shortcuts. They instead **require self-control and attention**.

Deliberate giving is rooted in logic / rationality





Deliberate Giving Objectives

- + Ensure appeals show how a gift will make an impact
 - + Provide additional resources or third-party resources to back up claims
 - + Illustrate the impact of gifts and how continued support will help
 - + Aim for larger gifts once donors feel ready
-





Deliberate Nudge Techniques

CREATE A COMMITMENT MECHANISM

- + Allow donors to schedule or commit to donations in advance
 - + Hold donors to those commitments through processing payments or reminding them of their pledge
 - + Create a public platform to use social pressure to keep people committed
-

SET GOALS & MAKE PLANS

- + Provide donors all the information they need to easily make their goals
 - + Help donors set and track progress toward their goals
 - + Break larger commitments down into manageable pieces and celebrate progress
 - + Remind people falling behind and offer easy solutions to get back on track
-

LEVERAGE SOCIAL NORMS & IDENTITY

- + Create an active community that provides resources and holds members accountable
 - + Make being a deliberate donor cool – do the research and plan out your giving
 - + Use more crowdfunding pages to make giving public
-



Deliberate Nudge Techniques Part II

BRING ATTENTION TO THE CHOICE

- + Present donors with an option that points out the benefit
 - “I’ll donate to help my community this year” vs “I will not be helping my community this year”
 - + Offer donors the ability to select the charity they wish their gifts to go towards
 - + Ask donors if they’ll be matching their previous donation
 - + Ask donors how they’ll spend their larger tax return with the new \$300 charity tax credit
-




Thank You



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DEG aims to be your most-trusted
and highest-performing partner.

THANK YOU