

DECODING YOUR AUDIENCE DATA TO OPTIMIZE YOUR REACH

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We all know that writing to your audience delivers the best results for your communications. But how do you **KNOW** that what you're doing is working? I mean, how do you really know?

Gone are the days where communications' return on investment is immeasurable. There are hundreds of tools – many of them come free with subscriptions you're likely already paying for – and they're just **WAITING** to give you all the statistics, feedback, and insight you could ever imagine.

IF YOU DON'T HAVE AN EMAIL MARKETING PLATFORM, GET ONE NOW!

Before this eBook will be of value to you, you'll have to bite the bullet and find the right email marketing system for your organization. This isn't about making pretty, branded emails. Yes, you can do that in Gmail. This is about reaching and engaging with your key supporters, increasing participation with your volunteers, and

securing more generous gifts from your donors.

“THIS ISN'T ABOUT MAKING
PRETTY, BRANDED EMAILS.
THIS IS ABOUT
**REACHING AND ENGAGING
YOUR KEY SUPPORTERS.**”

So many nonprofits are already heavily immersed in the email marketing game. But if you're one of the many who aren't, it's time for you to make it a priority. And here's why:

1. **You can personalize your audience members' individual experiences with your brand.** Through audience segmentation, targeting tools, and analytics that help you change course or take action as a communicator, you can really figure out what your audience wants from you and what resonates more.
2. **You can create a more agile approach to how you reach your audience.** Whether you're communicating about an event, an upcoming fundraising campaign, or even a job opening at your nonprofit, you can use the tools that auto-generate messages, and segment and track your audiences to make more informed decisions.
3. **You can evolve right along with your email marketing platform.** Email marketing software companies know that the competition is fierce, so they're constantly updating their platforms to be BETTER FOR YOU. New data segments, new design options, even new file storage and hosting options will continue to sharpen your email marketing game for years to come.



YOU KNOW
WHY YOU NEED
AN EMAIL
MARKETING
SYSTEM.

BUT **WHICH ONE**
SHOULD YOU
CHOOSE?

You should 100 percent take advantage of free trials, demos, and marketing videos for as many email marketing systems as possible before you make your final decision. Each system will have the same general functionalities, but the bells and whistles that come with particular versions will vary across the board.

To get you started, here are a few of my favorites:



- Pretty robust free account if you're just getting started or have a small contact list
- A 15% discount to nonprofits. You can check out MailChimp packages and pricing [here](#)
- Super easy point-and-click email templates
- In-product photo editing tools
- Audience "Tags" that allow you to segment your audience so you don't duplicate your contacts
- Easy-to-understand analytics
- Tons of app integrations so you can automate capturing donor information, landing pages, website views, workflow, campaigns, events, social media...basically everything. If you're curious, you can check out their list of integrations [here](#)



- Offer a 15% nonprofit discount
- Beautiful templates and point-and-click email design
- My personal favorite - the ability to insert (and remove) [dynamic content](#) in the email builder
- Real humans to help you onboard to the platform, and consult and assist you as you get going.
- Though they offer a 15% discount to nonprofits, it's one of the most expensive in the crowd. But if that isn't as big of a concern to you, you can check out your pricing options [here](#)



- Over 400 templates to choose from, but also the ability to code your own if you so desire
- Plug-ins for WordPress and Facebook that allow people to sign up for emails directly from your pages
- Good analytics that are presented intuitively
- MAJOR con: No free version (only a free trial)

This list is not inclusive of all the options out there, so I encourage you to do your research and determine what features are most important to your organization. [PCMag's Top-10 list](#) is a great place to see some more robust reviews and analysis on some of the best platforms out there.

HOT TAKE:
YOUR ONLINE
IDENTITY
IS MORE
IMPORTANT
THAN YOUR
SOCIAL
SECURITY
NUMBER

I didn't know my social security number until I got to college. The first time I ever had to use it was when I was completing my financial aid forms. I had to ask my mom what it was, and she, of course, rattled it off from memory. And I remember her telling me that I needed to write it down, but that I needed to keep it private.

Fast forward a few years later when my baby cousin – living in Germany at the time – had a hospital bill in his name from our hometown's hospital. Someone had used his social security number to create an identity and receive treatment.

Now, I fully grasp that a simple nine-digit number carries the weight of your entire financial profile, your identification, and your criminal record (or lack thereof). But what about all of the other things that are much more easily hackable that make up your online identity? And furthermore, what actually is an online identity?

Let's start with the latter. What is an online identity?

The first thing you need to know is that even if you don't have social media accounts, if you so much as use the internet, you have an online identity. Your online identity can be made of tons of different things: your Amazon shopping cart; your Google search history; your financial transactions; your login credentials; really anything that you do online creates your identity.

Answer a few questions for me...

1. Have you ever "shared" your Facebook profile to find out which ice cream flavor you'd be?
2. Have you ever clicked on a "Sponsored" post or ad on your social media platform of choice's feed?
3. Have you ever created an account to access content?
4. Do you use the same password for everything?

All of these examples, and all of these actions that you WILLINGLY take, put valuable information out into the interwebs that companies, organizations, and potential security threats around the world are doing everything they can to get hold of. Sure, many of them aren't trying to be malicious with your data – in fact, most of them just want to sell you something – but your information falling into the wrong hands is a risk you take when you're online.

“THE FIRST THING YOU NEED TO KNOW IS THAT, EVEN IF YOU DON'T HAVE SOCIAL MEDIA ACCOUNTS, IF YOU SO MUCH AS USE THE INTERNET, YOU HAVE AN ONLINE IDENTITY.”

NEVER FEAR! YOU **CAN** PROTECT YOUR ONLINE SELF!

Create strong passwords. And not those auto-generated number-letter-symbol combos because apparently there is software out there now that can run those pretty fast? And (I need to take my own advice on this) use a different password for every account. That way, if one gets hacked, the others don't go down with it.

Get rid of spam emails. Do NOT click on the strange email with the kind-of-legit-looking link. And if that link is actually a real link that doesn't automatically crash your computer (do people still say that?), do NOT put your personal information into the form. Just don't. Flag it. Report it. Forget it!

Create a secondary email address. And maybe a tertiary one too. Don't use your primary email address to set up social media profiles, video game accounts, news site comment threads, or anything like that. That's just asking for trouble.

Find some ID Protection or Notification services. It seems strange to say "enter your personal information into an online account that will protect your personal information!" But you should consider it. I use IDNotify, which allows me to enter anything from credit card numbers and bank accounts to old phone numbers, addresses, and social media accounts. Anytime something happens with that information that seems sketchy, I get a notification. So though the damage may already be done, there's potential for me to stop it before it gets worse.

I'm not trying to freak you out. Online identities are a GOOD thing!

Every time you create an account, sync an account, click, pause, hover, leave a website, add something to your cart, search for something, go somewhere and "check in", enter a promo code - literally ANYTHING - you are adding to your online identity. And though this piece is more about protecting yourself, the rest of this eBook will talk all about how you can use online identities and data to your advantage with donors, supporters, and community members.

USING
THE TRINITY
MINDSET
TO GET
ACTIONABLE
INSIGHTS AND
METRICS

So now that you know that alllllll that data is out there, it's time we talk about what data to use and what the heck to do with it. Because honestly, there is just SO MUCH OUT THERE. Even the data you get from the free stuff can be overwhelming.

I first read about [“The Trinity”](#) when I was in a role that didn't have much to do with data (the method actually originated in 2006, so way before social media and email marketing was a big thing). But as the marketing analytics thing really matured, I found it to be classically relevant. Just a quick spoiler alert: The Trinity organizes how you should use data into three elements. And here they are:

The Behavior Analysis. These metrics are the ones that show what people actually do with your content. The answers can be pretty basic, but TBH, these are some of the most important. Questions like: How many people opened your email? How many people clicked the links? Which link got the most clicks? Where else were people clicking within your email? What time are people opening your emails? Are people unsubscribing when they get your emails?

You can typically find most of this data on a dashboard within a free subscription to your email platform, so it's relatively easy to find.

Why does this information matter? Because understanding your audience's behavior will help you make sure you're tailoring the experience to their preferences, which can increase the likelihood that they'll actually engage and act on your content rather than just swipe on by.

The Outcome Analysis. These are the metrics that show what the actual business results of your campaigns are. You know – the results you'd share with your Executive Director or your Development Director. For nonprofit's sake, this isn't as quick of a hit and takes a little bit of work to get it into place. MOST fundraising platforms, event management systems, and donor management systems don't quite connect with email systems. BUT, there is a way to make this happen.

MailChimp in particular offers [Analytics360](#) to its paid subscribers, which syncs your Google Analytics account to your emails. Many of the other email platforms also offer Landing Page building options to help you understand what converts and what doesn't. And what this means is that you'll be able to track the journey of the person who might click your DONATE NOW button in your email.

Why does this information matter? Because it will help you figure out where things may have broken down in the journeys you've created. Any call to action you share with your audience should have a relatively simple process. And if it doesn't, the person will likely get frustrated and abandon the process. This will help you cultivate important things, like your organization's donor journey, your brand, your site map, and even your software.

The Experience Analysis. The third element involves the metrics that show the why behind the what. Most of the time, this isn't something that your email marketing analytics system can just build a report for. The experience analysis can be achieved by (virtually for free) by conducting surveys or conducting A/B testing (which we'll get to in a minute).

Why does this information matter? Again, knowing how your audiences' brains work is important as you craft and finesse your marketing and content strategy. If your content isn't converting, and your action items aren't happening, you have to make a change. This information will give you good places to start.



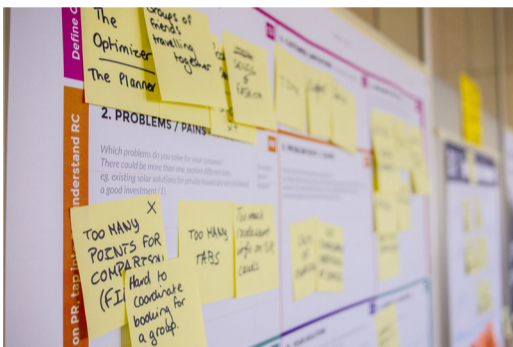
CONDUCTING
YOUR FIRST
A/B TEST

Like everything else in the world, your audience is constantly evolving, expanding, and changing. It's impossible to keep a pulse on your audience without constantly testing. And this is where an A/B test can come in handy for marketers and fundraisers.

Before you decide to do an A/B test, you **MUST** have a solid why. **WHY** are you doing this? **WHY** will anyone besides you care? **WHY** will these results be valuable enough to make any changes? These are the key questions you must answer to develop a compelling and convincing case to, as my boss puts it, “mess with our audience.”

Conducting an A/B test is relatively complex, but if you divide your work into three main phases, it breaks down pretty easily.

PLAN



- **Identify your conversion goal.** What are you actually trying to figure out? Examples: Email opens if you're testing a subject line; clicks if you're testing an email layout; actions if you're testing a landing page.
- **Determine if you can actually track that goal.** Make sure you have Google Analytics set up on your website (this will capture analytics for specific URLs) OR get familiar with the analytics functions offered by your email marketing platform.
- **Make your hypothesis.** You have to identify an educated guess on what this A/B test will tell you (this will likely be one of your why's). The key to making a sound hypothesis is to limit the number of variables in the equation (HELLLOOOOO, Junior High Science class!).
- **Make sure you have an adequate sample size.** A total of 10 people isn't going to cut it. There's a [great tool available for FREE from Optimizely](#) that can help you figure this out.

DESIGN



- **Design your elements.** You must design your “control” group, which is how this campaign would normally be done, and your “variable” group, which integrates your new idea. **DON'T FORGET ABOUT YOUR HYPOTHESIS.**
- **Set it up.** MailChimp offers A/B testing (and analytics) without any additional plugins or tools. But if you aren't using an email platform, you can do all of this manually (just don't forget to set up your Google Analytics).

DOCUMENT



- **Finally, validate and document what you've learned!** And then rinse and repeat for other elements you'd like to test.

UNDERSTANDING
AND SEGMENTING
YOUR AUDIENCE

The future of marketing lies within personalized, unique audience experiences. And the time has come for nonprofits to develop their audience journeys through audience segmentation. Running your marketing department without a solid understanding of your audience translates to wasted time, ineffective campaigns, and tons of unsubscribes.

Giving – whether it be actual money, time, or simply attention – has become a deeply personal thing. So you **HAVE** to make sure you understand who you’re talking to, how they want to be talked to, and what messages and information they value.

How do you segment your audience?

We’ve covered several data groups in this eBook, but here are the pieces that will help you create audience segments that work:

1. **Demographic data.** Your audience’s A/S/L. This information generally won’t change, though it could, but this can help with segmentation, personalization, and any automated emails.
2. **Preference.** This could be collected on some type of preference center within your email platform. It could be types of emails they want to receive, frequency, topics they care about, etc. This isn’t something that a person will be able to just offer up. You’ll have to add this data collection step to your funnel so they have to fill it in.
3. **Transactional.** Identify how they engage with your organization. Are they donors (large, small, recurring, lapsed)? Maybe they’re volunteers or event attendees or program participants. Whatever they are, you need to label them properly and make sure that you tailor their experience so that it’s relevant.
4. **Behavioral.** This could be anything from email opens and clicks, to what types of links they tend to click on. Your email marketing platform likely has something that can help you with this. MailChimp creates a “profile” of sorts for each audience member and can show you their habits.



IN CONCLUSION,
**DOCUMENT,
DISTRIBUTE, AND
DO SOMETHING!**

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Your data is only as valuable as the actions you take beyond your analysis. For each campaign you launch, your team is best served by circling back to determine what dazzled, what disappointed, and what opportunities await you the next time around.

Follow these simple steps to successfully apply a data-based approach to your campaigns:

1. **Record important metrics** – like Open Rates, Unique Opens, Unique Clicks, Click-to-Open Ratio (unique clicks/unique opens) – **for all of your email campaigns.**
2. **Compare your numbers to the [average engagement numbers for the nonprofit industry](#).**
3. **Note the variables** – Subject Lines, Email Themes, Calls to Action – **in those campaigns that performed well.**

In newsletter-style emails where you have multiple calls to action, be sure to look at the “click report” to see which types of content best resonated with your donors.

4. **Document your takeaways and campaign metrics and share them with your team.** While it’s easy to slack on this step, it’s actually the most important one!

You should always make sure that everyone who is tasked with donor engagement initiatives is well aware of these critical insights. After all, your donors are telling you what matters to them with every click they make and this exercise helps you translate those clicks into messages, themes, and ideas you can implement throughout the year.

5. **Once your staff has had a few days to review the metrics and takeaways, set a meeting to brainstorm how you can transform your takeaways into the future success of your fundraising campaigns and events.**

I want to be really honest – data and marketing analytics is a full-time job, which is typically why larger companies have data analysts whose jobs are to pull and analyze data for marketing purposes.

You, on the other hand, get to prioritize how you use your learnings. My best advice? Start by making small adjustments to your email marketing strategy. And then, once you’ve got that partially figured out (because by the time you figure it out, something in the tech world will have changed), you can move into other marketing spaces...like social media...or web management...or digital advertising...

ABOUT THE AUTHOR **KADI MCDONALD**

With a passion for learning, growth, and good stories, Kadi has cultivated a personal and professional brand that radiates authenticity, transparency, and deep, meaningful relationships.

Whether she's attending a conference, reading an article, helping a client, or having coffee with a friend, she's listening for opportunities to connect, inspire, and grow.

Kadi is a professional marketer, communicator, project manager, social media manager, brand manager, and dog mom. She has written for TopNonprofits since 2013. Kadi is the Founder and Chief Creative Officer of [Kadi McDonald Creative](#), and she currently resides in Columbus, Ohio.