



Email Marketing Best Practices for Nonprofits

Presented By: Matthew Montoya, Constant Contact
Thursday, April 29, 2021 | 2:00 – 3:00 p.m.





We know the value of relationships and are proud to connect you with Constant Contact, a member of our partner network.



Raise More, Manage Less

**Donation Forms | Event Registration
Text Fundraising | Peer-to-Peer | Auctions
Integrations & Data**



Work smarter, not harder

**email marketing | websites | ecommerce
landing pages | social ads
social media management**

Today's Speaker



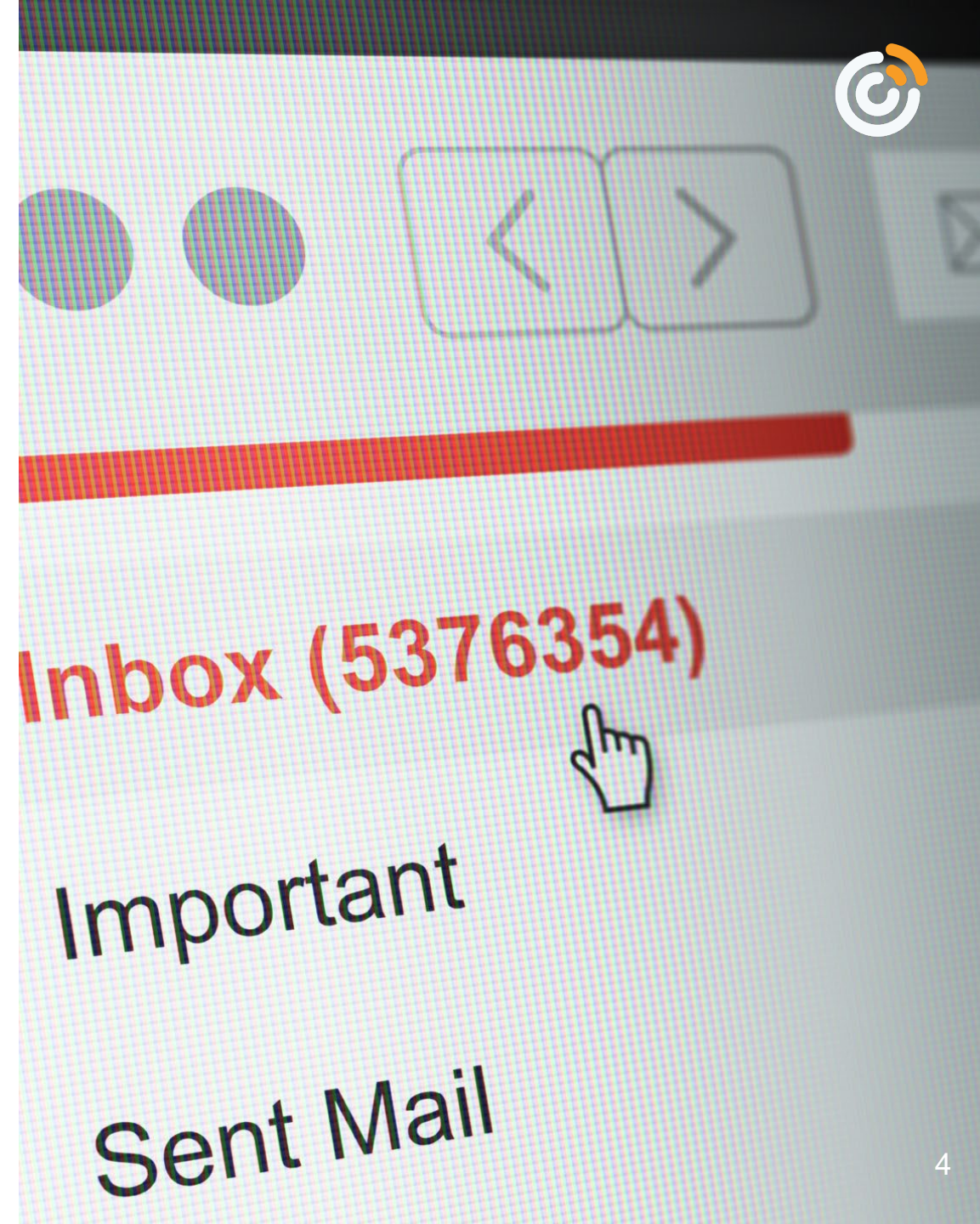
Matthew Montoya Partner Enablement & Training Manager at Constant Contact

Matthew Montoya, Partner Enablement & Training Manager, Constant Contact - In his ten years at Constant Contact, Matthew has taught over 15,000 small businesses, nonprofits, and individuals to work smarter. In his 20 years in marketing, he's worked on nearly every kind of marketing vehicle around, and even spent 4 years working at a nonprofit helping achieve and surpass donation goals primarily through email marketing.

Common Email Marketing Pitfalls for Nonprofits

- Overly complex email
- Not emailing regularly enough
- Not linking enough to website
- Not using data strategically
- Weak mobile email design

Some use “regular” email (Gmail, Outlook) for bulk sending






Why regular email doesn't work

- Limited sending
- No formatting control
- Susceptible to filters
- No cohesive branding
- Potential SPAM complaints
- No tracking or reporting

Stay cool when it's hot!

 **Southside Cycling** <southside@southside.com>

to Black, Robert; Black, S.; Braun, Adelle; Braxton, Carson, Thomas; Sherry; Cassey, Spenser; Chives, Daniel; Duggar, Rich; Downs, Tammy.; Dale, Mickey; Dickens, Kyle; Finnegan, Carry; Fineststein, B.; Fish, Alex; Felder, M.; Grace, Kiley; Heldman, Samantha; Isaacson, Fiona; Jackson, Cheryl; Jackson, Bob; Jones, Robert; Johnson, Ben; Kale, Gretchen; Lindstrom, David; Lowes, David; Miles, Jackson; Minestrone, Chicory; Manolitsis, Rebecca

From: Southside Cycling [mailto:southside@constantcontact.com]

Sent: Thursday, June 11, 2015 3:37 PM

To: Black, Robert; Black, S.; Braun, Adelle; Braxton, Carson, Thomas; Sherry; Cassey, Spenser; Chives, Daniel;

Subject: Stay cool when it's hot!

Let us help you have the perfect cycling summer! Visit our shop for the latest trends on gear for the season...

Hi! Tanya,

Have you checked us out lately?

Our bike shop has all the latest the Summer season trends at discounted prices and we're looking to keep you "cool" in the heat! We appreciate your business and if you haven't stopped in recently, bike on over and you will find all the latest gear for your cycling needs. We want to be your partner on the road. Check out our new latest and greatest in helmets, shoes, glasses, gloves and other sports wear. In addition, we have some upcoming workshops that may interest you.

Our very own Brody will be instructing those of you who would like to learn the art of bike repair and tuneup, for a hands-on workshop this month. You will learn how to clean and restore older models for reuse and he will also educate you on what to look for when shopping for a new one. Workshops start June 21 and run for 3 weeks, from 7:00 pm - 9:30 pm. Please visit our website at www.southsidecycling.com to sign up! Bring a friend and receive a 15% discount on your next in-shop purchase!

Don't forget about our event at the end of the month! We put our best foot forward when we pedal for charity! Donations are accepted and you don't have to be a professional to participate. Be sure to visit our shop to gear up for that Summer trek to stay comfortable while you help to make someone else's life a little easier. Sign up now for this wonderful event on our website. Families are welcome!

Thank you for your continued customer loyalty and please stop in the shop and say hello to Brody and myself! We look forward to seeing you!

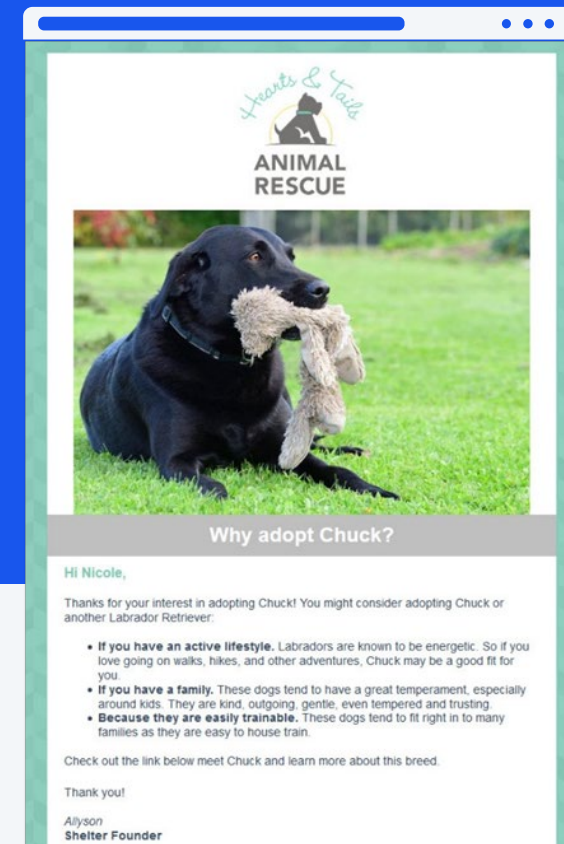
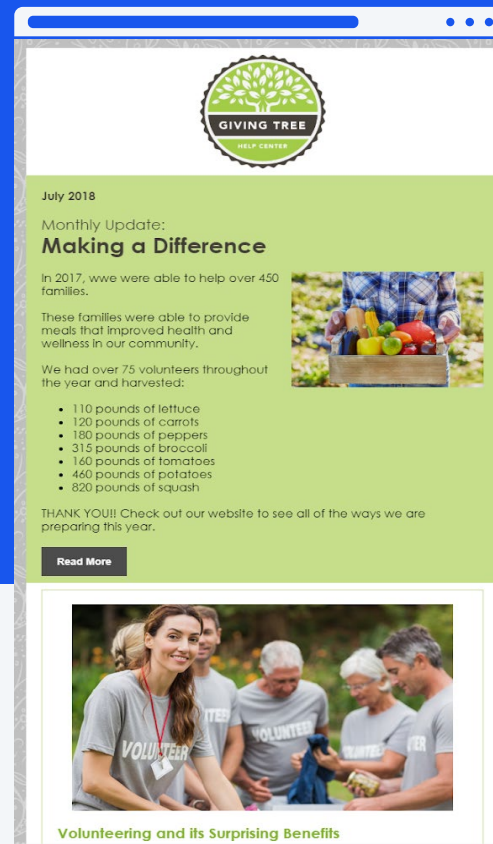
Stay cool!

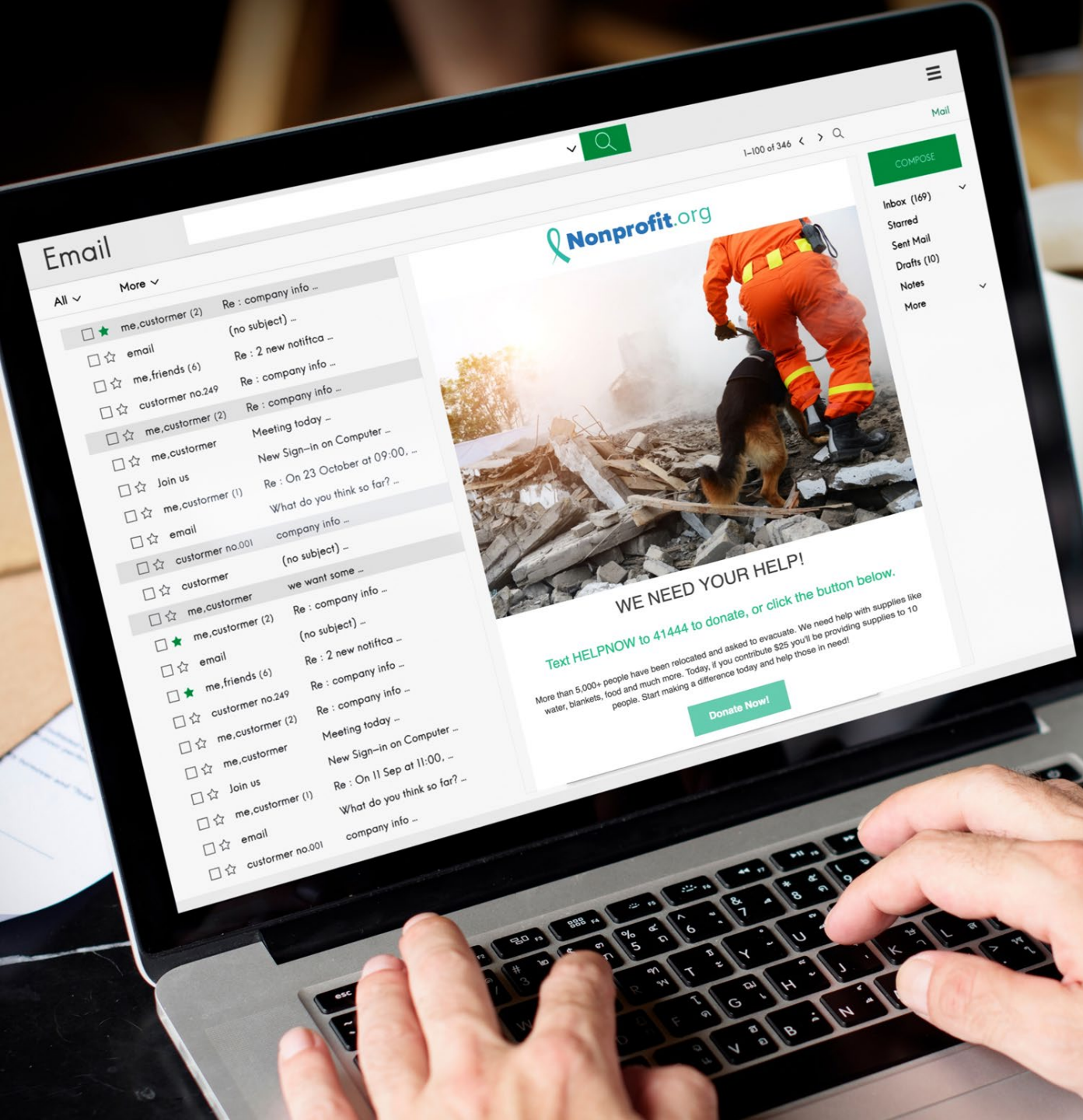
Southside Cycling Team



Email marketing best practices that make you look great!

- Provide beautiful templates
- Reinforce brand identity
- Manage subscriptions
- Ensure email delivery
- Track results
- Obey the law





38% of online donors are
inspired to give from an email.

Source: Nonprofit Tech for Good

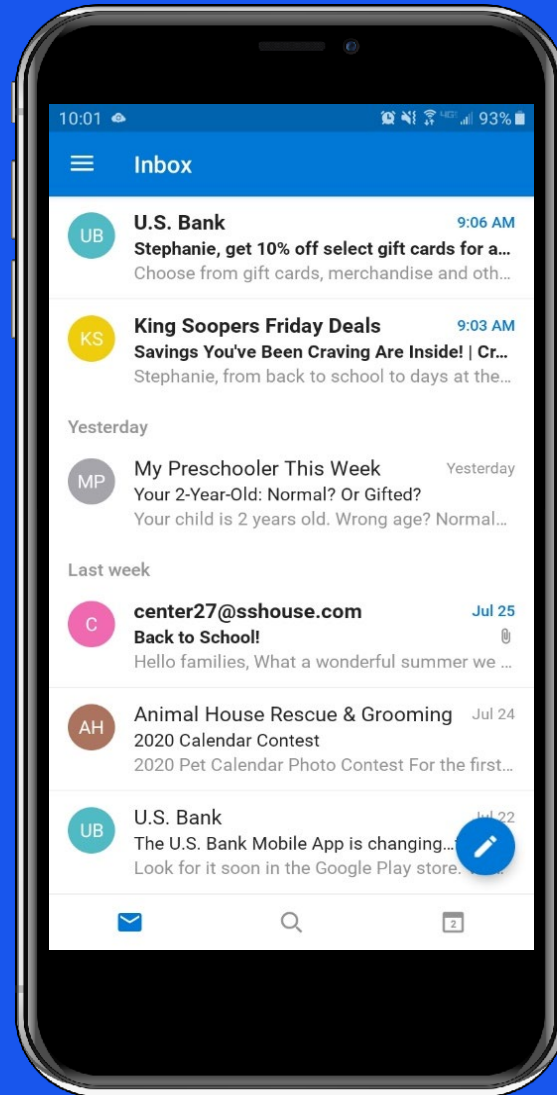


Email marketing delivers.

3x the conversion rate
as social media

For every **\$1** spent on email marketing,
there is a **\$42** average ROI

Source/s: Litmus; Direct Marketing Association; Pew Research Center, 2015; Forrester Research, 2014;
Forbes.com; Salesforce.com Constant Contact Small Business Growth Survey



Email is reliable.

Email gets delivered over **90%** of the time.

(Facebook posts reach just **2%** of fans.)



Q: What is the #1 app on smartphones?

A: Email

More than half of all emails are opened on a mobile device



A person is shown in profile, holding a smartphone. The image has a blue overlay. Text is overlaid on the image, stating that 91% of people check their email daily and 88% regularly check email on their smartphones. A laptop keyboard is visible in the background.

91% of people
check their email daily

88% regularly check email
on their smartphones



First impressions matter now more than ever

So how do we make sure you are doing the right things to be effective?

What's wrong with this email?



APRIL 15TH IS COMING. ARE YOU READY?

COPLEY CONSULTING GROUP, LLC

413-513-0027

TOP TIPS TO ENSURE CLIENTS PAY ON TIME AND INCREASE YOUR CASH FLOW

On paper your business is thriving. Sales are up and you really haven't increased your expenses. But, you're still having cash flow problems. This is a serious concern for businesses in all industries, of all sizes.

While there could be a number of reasons why you're dealing with cash flow problems, one of the obvious places to start is by opening your books and seeing what's going on with your invoices. This means looking into which invoices have been issued, paid and received. By tracking your money movement, you should have a better understanding on what's going on with your cash flow.

Of course, there's another important part of bookkeeping. Making sure that clients pay their invoices on time which will increase cash flow. Over the years, I've learned the hard way how to help payments get in on time, without having to turn to financing or factoring, that you can accomplish this goal.

1. Make Invoicing a Priority

No matter the size of your business, cash flow is arguably the most important determination in whether or not your business succeeds or fails. While this may sound obvious, the sooner you send out invoices to clients, the sooner you'll get paid which means that the cash will keep pumping in. Whenever you've completed a project, you want to send out an invoice so that you won't forget about it later. After all, you're extremely busy and it's easy to let an invoice get overlooked. However, prioritizing invoicing doesn't just mean sending out bills in a timely manner. It also means following up on any invoices that are overdue. Again, if you aren't bringing in any money, how can you pay your bills? Software has now made this task much easier. Here is the best software for how to bill, follow up and get paid. It walks you through all the necessary steps to get paid.

2. Don't Leave Out Specific Details

You should ask each and every client what they require on their invoices since they all have different payment policies. It may sound like a waste of time upfront, but if you address this area prior to sending out an invoice you're reducing the chance of an invoice being returned or not paid because you left out a piece of information. Here are some questions to help you get started on your invoice:

- Does your client require a purchase order number or will an invoice number be enough?
- Are you required to have an Employer Identification Number?
- How detailed does the invoice have to be?
- Who should I send the invoice to?

3. Send to the Right Contact

Just because you've dealt with one individual throughout a project or sale doesn't mean they are in charge of the payment. Perhaps, they have a business partner or accountant who handles all of the incoming invoices. Additionally, that person may even have a different email address for their accounting needs. For example,

Why Small Business Owners Should Think About Taxes Year-Round

For many small businesses, tax season is a grueling time of year. It's often associated with stress, record-keeping and exhaustion. This is one of the key reasons why small businesses should be thinking about their taxes year-round and prepare long before it comes time to file. By folding tax planning into your overall business strategy, small business owners can tackle their taxes far more effectively (and may even end up with bigger deductions than they anticipated). Here are some of the best ways to prepare for your small business 365 days a year.

About Us

Your Success Is Our Success

Growing your business and serving your customers each day, month and year are your strengths. Ours are managing, processing and keeping track of all facets of accounting.

Providing services for companies of all sizes, (from small to medium to large) and individuals, our trusted experts and Certified Public Accountant are available to help you with your accounting and tax related needs.

Accounting, Simplified

At Copley Consulting, LLC our consultants and Certified Public Accountants strive to enhance your bottom line through cost



Time's up!



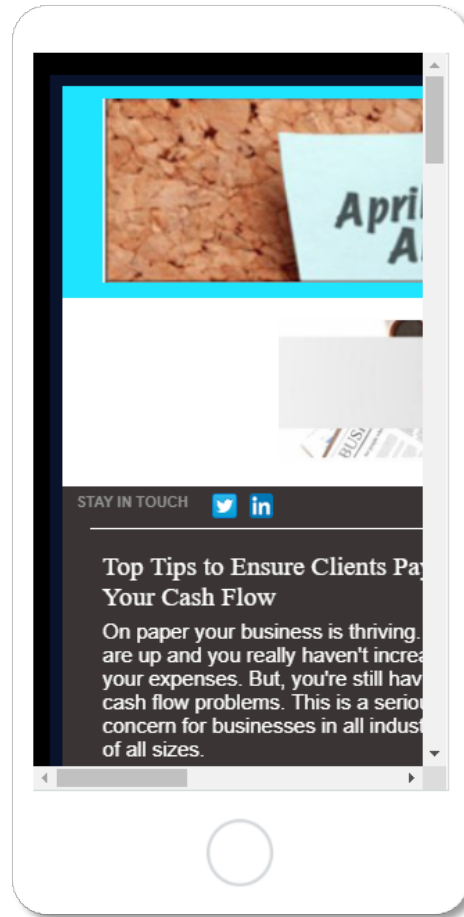
Why **5** seconds?

When email design doesn't take mobile into consideration

80%
Delete

30%
Unsubscribe

So let's think about this email again



April 15th is coming.
Are you ready?

COPLEY
CONSULTING GROUP LLC

STAY IN TOUCH

413-513-3027

Top Tips to Ensure Clients Pay on Time and Increase Your Cash Flow

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Providing services for companies of all sizes, (from small to medium to large) and individuals, our trusted experts and Certified Public Accountant are available to help you with your accounting and tax related needs.

Accounting, Simplified

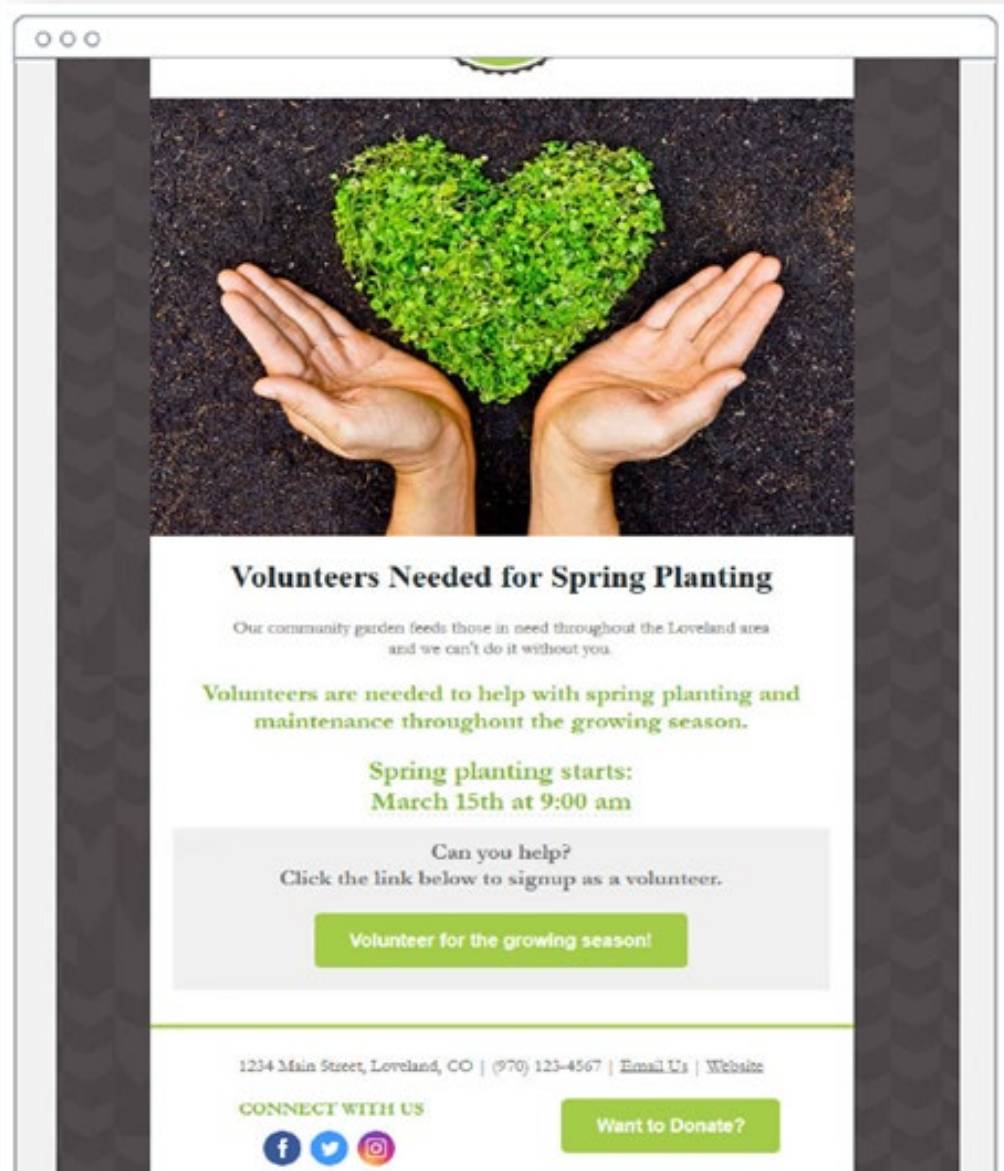
All Copley Consulting, LLC our consultants and Certified Public Accountants strive to enhance your bottom line through cost



A person is shown from the chest up, holding a black smartphone with both hands. The person is wearing a light blue sweater. The background is blurred, showing a laptop keyboard and some papers. A semi-transparent blue overlay covers the entire image, and white text is centered over it.

HOW TO LAY OUT AN EFFECTIVE EMAIL

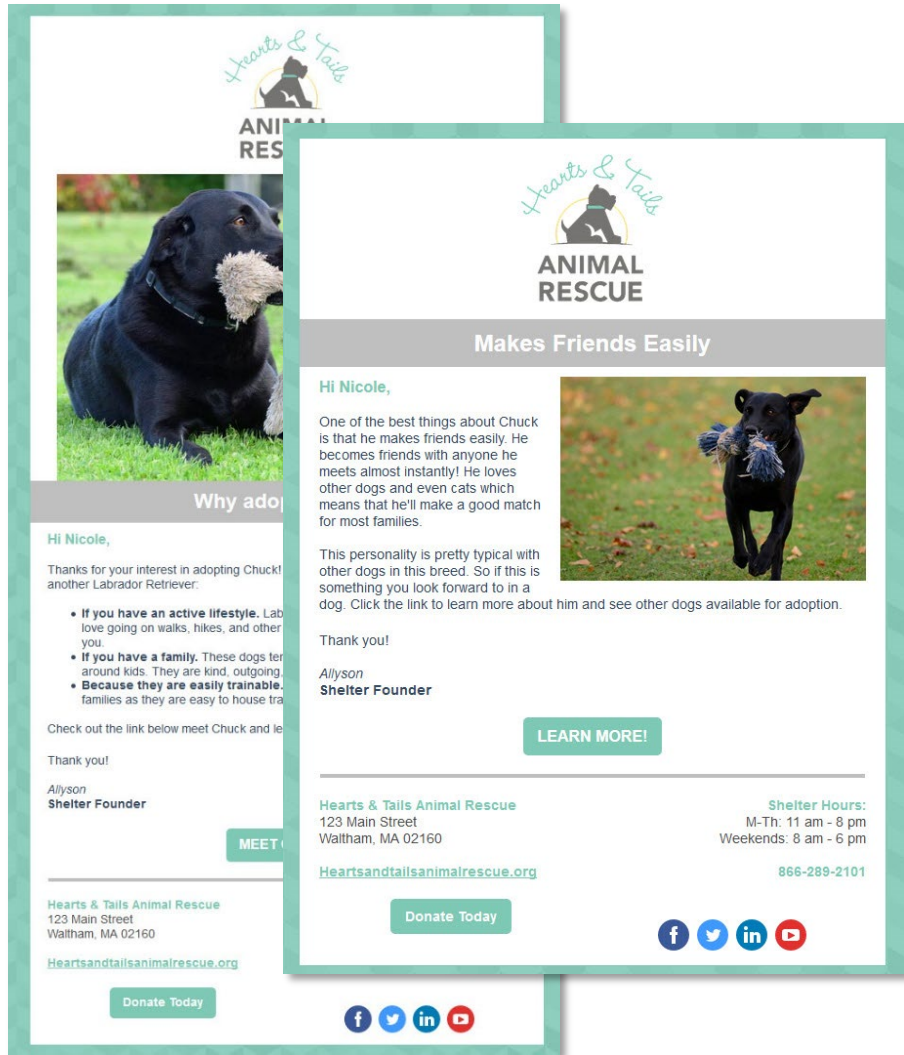
Keep it Succinct



- Logo that reflects your brand
- Headlines: 22 pt. | Body Text: 14 pt.
- CTA: Less IS more!
- Attract, engage and redirect

20 lines of text or less or a picture, a paragraph and a call to action should make up the composition of your email.

Use Consistent Colors

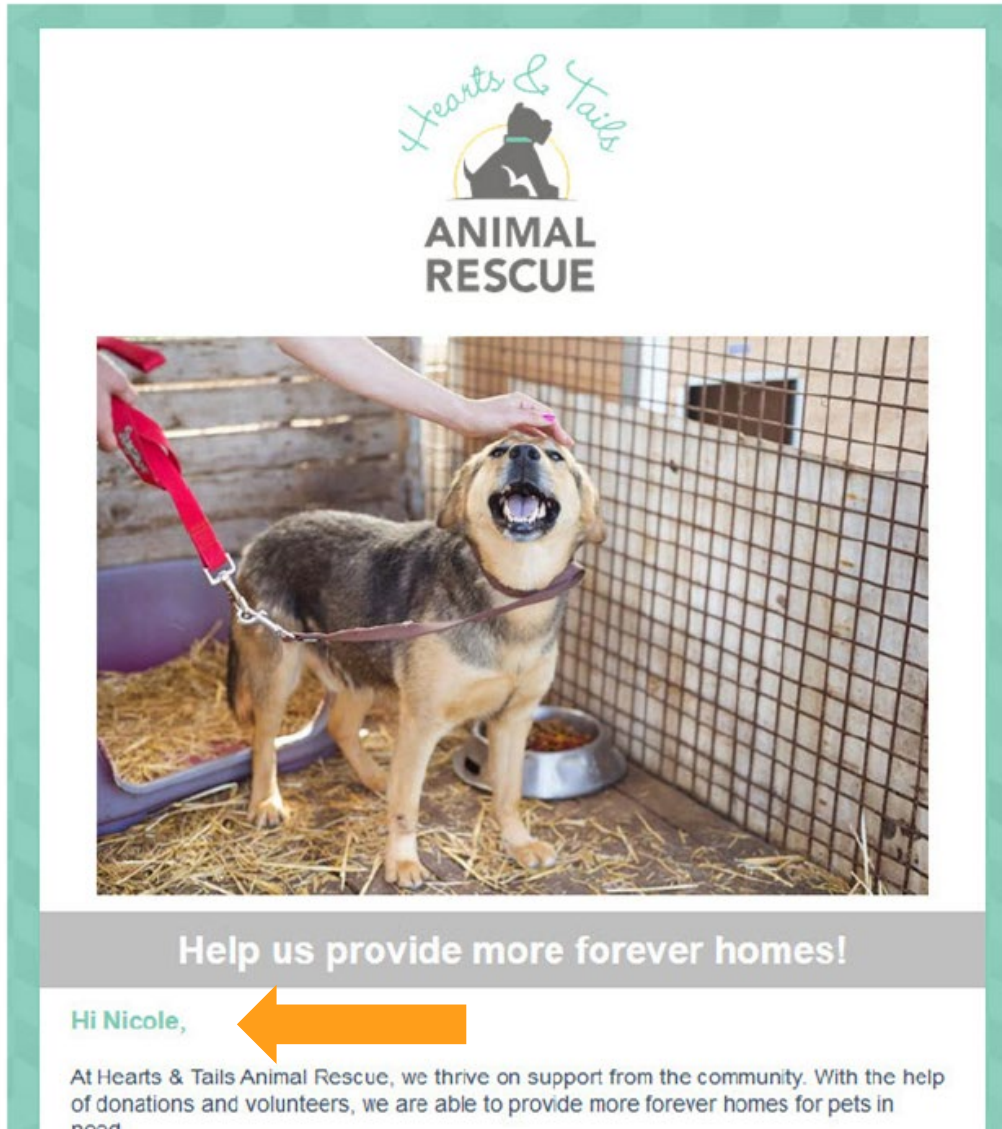


- Keep colors the same
- Color represents brand, quickly
- Celebrate holiday with content

Color increases brand recognition by

80%

Make it Personal



- Causes awareness
- WIIFM
- Makes problem/solution, theirs

11% higher open rates and 27% higher click through rates when you add personalization

Always Use Images

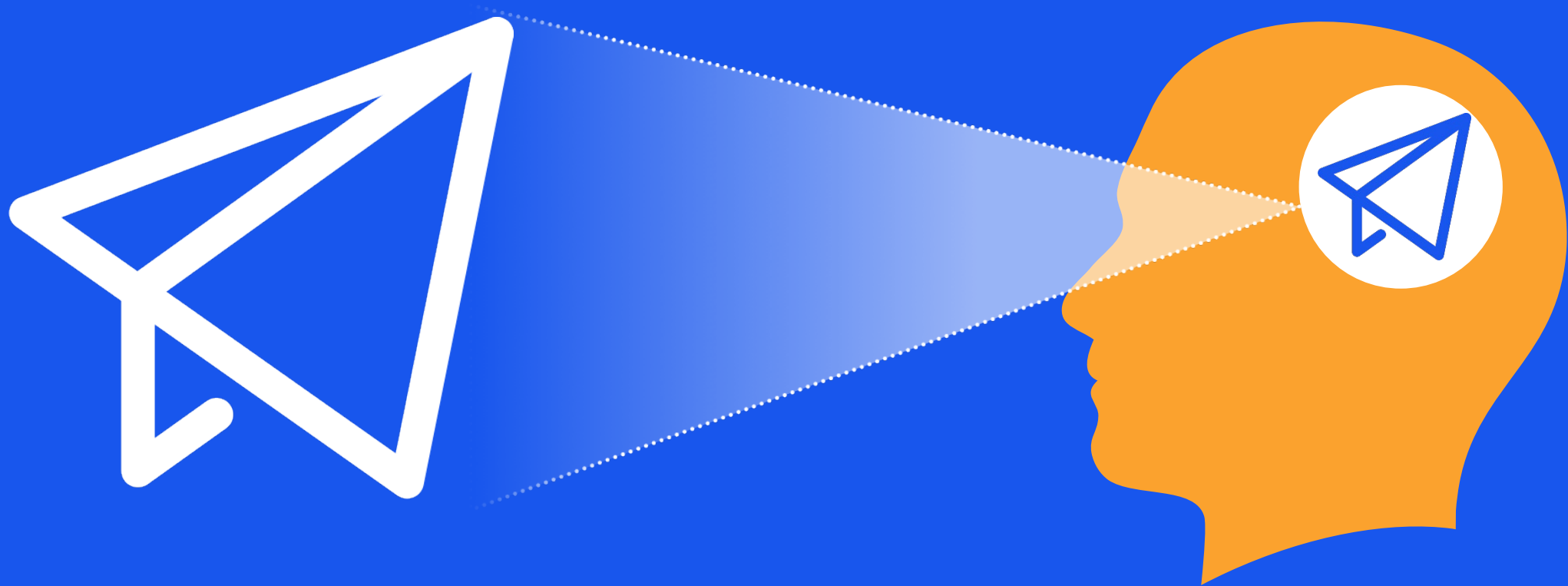


- Logo that reflects your brand.
 - Link your images
 - Use same destination as CTA
 - Limit to no more than 3
 - Never use 100% image
- 650%** higher engagement rates
for posts/emails that include images.



Images are content too!

90% of information processed by the brain is visual content



Working with photos

- Choose the right size - be aware of scroll
- Avoid copyright issues
- Use your own photos
- Find stock images



Use Buttons Instead of Links



- Buttons are easy to click on with finger
- Bullet - proof
- Eye catching

Using a call - to - action button instead of a text hyperlink can increase **click** through rates up to **28%**

A person is shown in profile, holding a smartphone with both hands. The phone's screen is dark. The background is a blurred office setting with a laptop and papers. The entire image has a blue color overlay. The text "Why clicks?" is centered in white.

Why clicks?



Opens

- Gauge interest
- Determine best day/time
- **Nonprofit average = 22%**





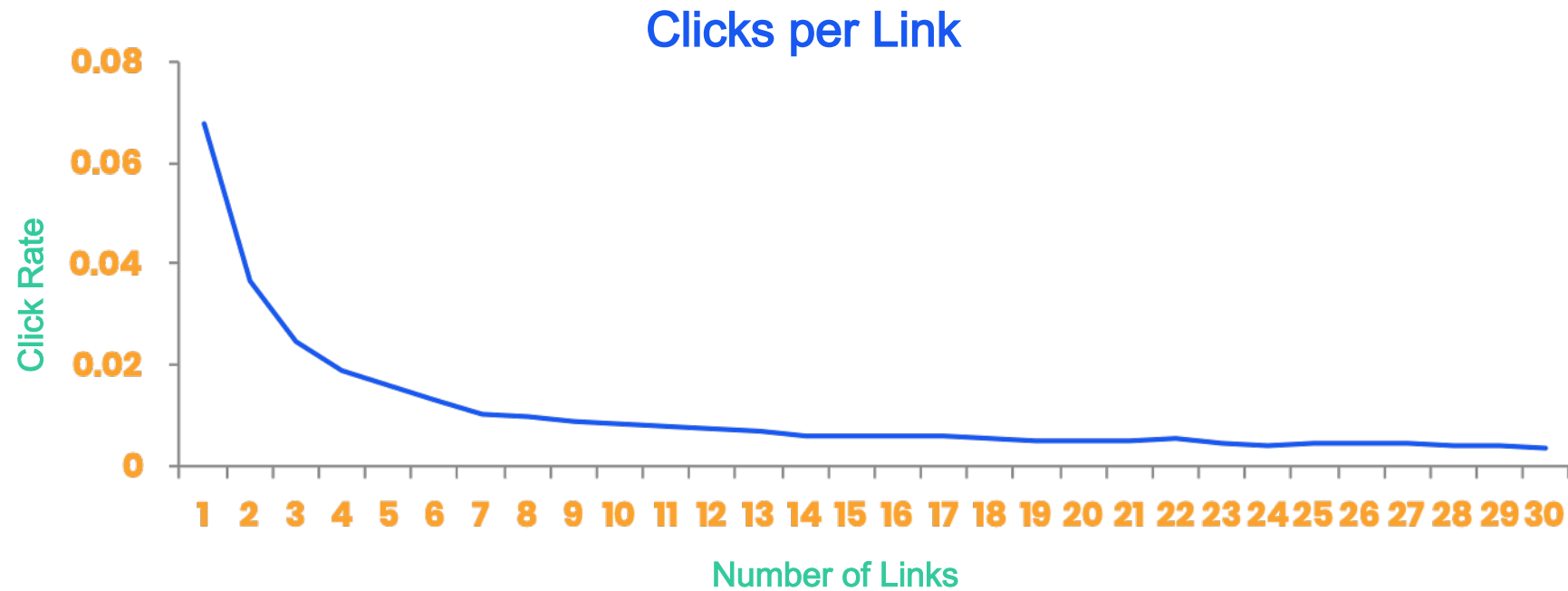
Clicks

- Measure success
- Identify engaged readers
- **Nonprofit average = 10%**





Fewer links, more clicks.



1

most clicks

2

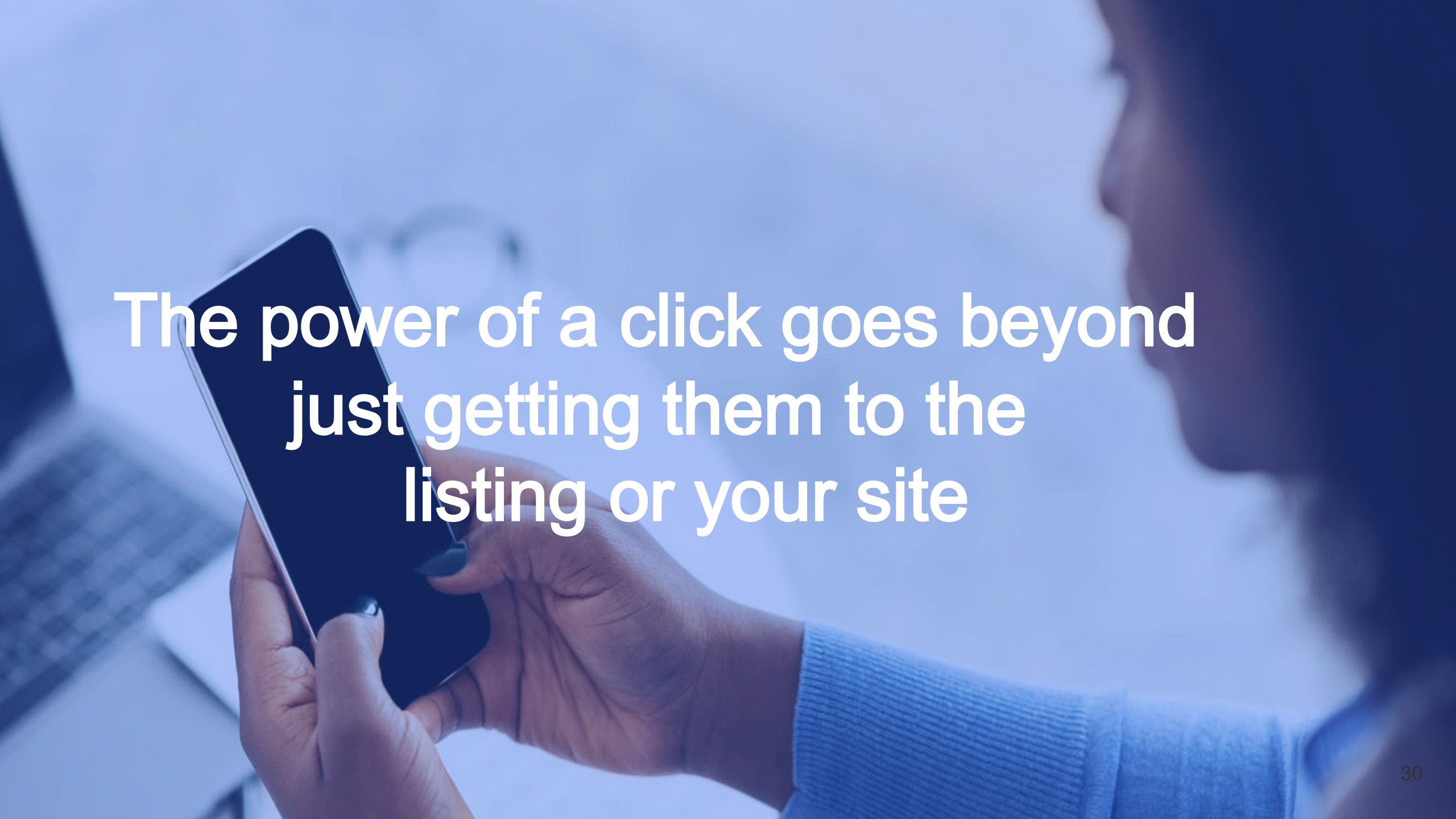
okay

3+

steep decline

5+

less to no clicks

A person is shown from the chest up, holding a black smartphone with both hands. They are looking at the screen. The background is a blurred office setting with a laptop and papers. The entire image has a blue color overlay. White text is centered over the phone and the person's hands.

The power of a click goes beyond
just getting them to the
listing or your site

Targeted, relevant emails are important!



11%

Personalized
subject lines
receive a 11%
higher open
rate

27%

Personalized
emails receive a
27% higher click
rate

\$\$\$

Contacts who
receive relevant
content spend
more money and
tell more people

A person is shown in profile, holding a smartphone. The background is a blurred office setting with a laptop and papers. The word "Target" is overlaid in white text on the right side of the image.

Target



How Click Segmentation works

Contact clicks



ANIMAL RESCUE

Makes Friends Easily

Hi Nicole,

One of the best things about Chuck is that he makes friends easily. He becomes friends with anyone he meets almost instantly! He loves other dogs and even cats which means that he'll make a good match for most families.

This personality is pretty typical with other dogs in this breed. So if this is something you look forward to in a dog. Click the link to learn more about him and see other dogs available for adoption.

Thank you!

Allyson
Shelter Founder

[LEARN MORE!](#)

Hearts & Tails Animal Rescue
123 Main Street
Waltham, MA 02160
Heartsandtailsanimalrescue.org

Shelter Hours:
M-Th: 11 am - 8 pm
Weekends: 8 am - 6 pm
866-289-2101

[Donate Today](#)

[f](#) [t](#) [in](#) [v](#)

Contact is added to list

Insert Link

* Text to display as link

Dogs for adoption

* Link URL

www.heartsandtails.com/dogs

☒ Enable Click Segmentation

Clicking on this link will add the contact to the specific list, helping you send more targeted emails.
[Learn more](#)

Potential dog adopt

[Create new list](#)

Cancel Insert

Potential dog adopt (3) ☒ Make Contacts my default view

Manage Lists Export More Actions

Name	Email	Company	City, State	
Charlie	charlie@egiftmarketplace.c...		NH	
Devilacqua, James	jbevilacqua@constantcont...		MA	
Brown, Brandon	bugs@egiftmarketplace.com		NH	

Rows per page 1 — 3 of 3 items

Show 50 rows per page 1 — 4 of 4 items

Date

Birthdate, business anniversary



List

When they join or when you add them to a list



Behavior

Open an email or click on a link



Automation options

A person is shown from the chest up, holding a black smartphone with both hands. The person is wearing a light blue sweater. The background is a blurred office setting with a laptop and papers. The text "COMPELLING NONPROFIT SUBJECT LINES" is overlaid in white, bold, sans-serif font across the center of the image.

COMPELLING NONPROFIT SUBJECT LINES

Getting Your Email Opened

- “From Name” is most critical
- Subject Line assists “From Name”
- Teaser (Preheader) text helps

From name



Matco Foundation

12:27 PM

Subject line



With A Little Help From Our Friends

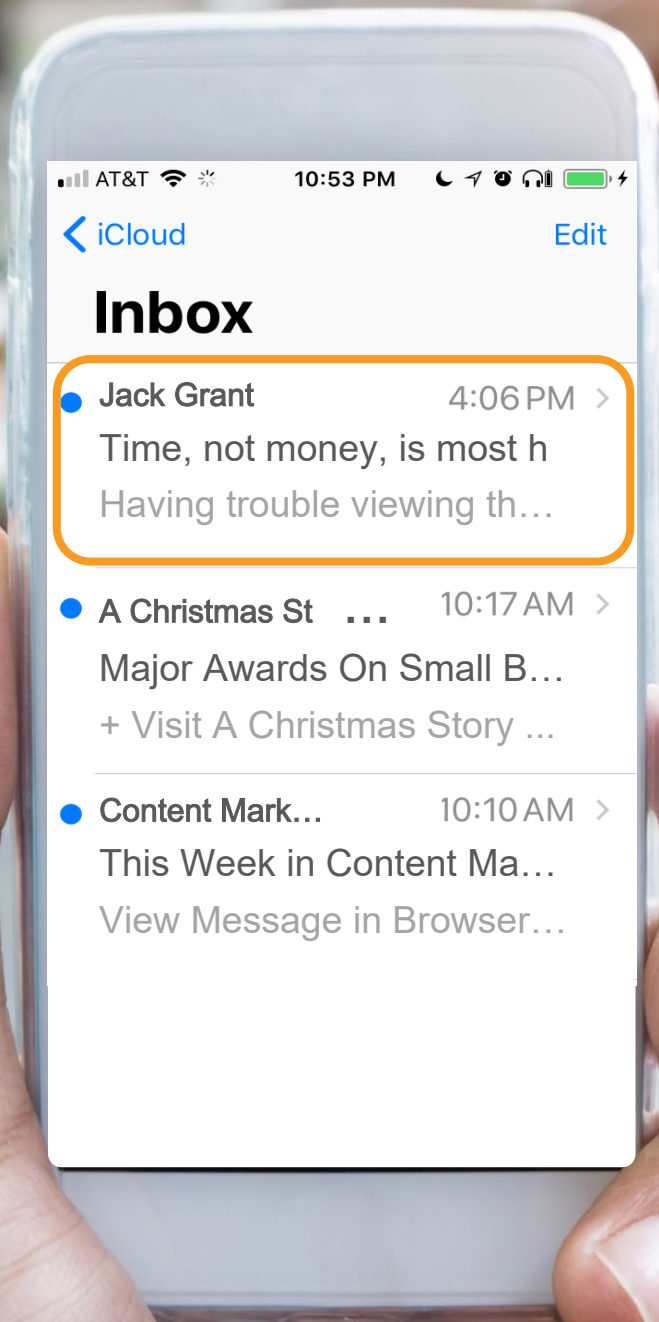


(Preheader) text



Your donation is needed now more than ever. If you





Header Information

From information

Consistent & recognizable

Reply to email address

Who is
Jack Grant?

Ideal length is 4 - 7 words

Preheader text

Hook them with 5 - 8 words

Avoid Repeats

Same subject line

- Gives no reason to open
- Gets tuned out

● Matco Association 12:27 PM
Matco February Update
Having trouble viewing this email? [Click here.](#)

● Matco Association 12:27 PM
Matco March Update
Having trouble viewing this email? [Click here.](#)



Questions

Ask a question to cause curiosity



Matco Foundation 12:27 PM
Can You Do More to Help?
Christmas is almost upon us. So many are needing



Matco Association 12:27 PM
Struggling To Find a Way to Help?
With the recent event affecting our community, many need



Matco Group 12:27 PM
Can We Help You Cut Time?
Time is the most important asset in your lives. Lost time





Alliteration

Repeat same letter, eye look for patterns



Matco Clubs

12:27 PM

Seven Simple Solutions Save Season

We've got what you need this season. We are ready to



First Matco Church

12:27 PM

Friday Fun For Families and Fellowship

has Some great activities for the whole family. From

FMC



Matco Clothing Emporium

12:27 PM

Today's Top Terrific Tips

Do you have all the steps you need to succeed? Here



Allusion

- Refer to pop culture or famous lines
- Lyrics and titles capture the eye
- Tie it to content



Matco World Group

12:27 PM

Let it Go, Let it Go

Drop those extra clothes off today. They are needed!



Matco Club

12:27 PM

Let Them Eat Cake, and Brownies

We've got a great breakfast meeting this month.



Matco Community Players

12:27 PM

May the Farce Be With You

Auditions are open for our next production.





Chunking



- Don't write a sentence
- Break the "rules" to stand out

● Matco Association 12:27 PM
You, Plus Us, Awesome
When we work together we can change the world! ➤

● Matco Financial Help Center 12:27 PM
Taxes, No Fun, We Love Them
We can help you, cost free, overcome common tax issues ➤

● Matco Club 12:27 PM
Help Others, Feel Amazing, Share
Each New Year, people are always looking for a way to help. ➤

Numbers/Lists

- Start with a number – it's like candy
- No more than 9 - 3 high results



Matco Light Foundation

12:27 PM

Three Mistakes All Ministries Make

We all make mistakes, but these can cost



Matco Humane Society

12:27 PM

Seven Ways to Help Your Pet

We don't just offer adoption, we know a thing or two about pets!



Matco Community Theatre

12:27 PM

Five Must See Films Before Summer

Don't start summer without checking out





Emoji

- 56% of brands using emoji in their email subject lines had a higher unique open rate. Source: Experian

Matco Health Coalition

12:27 PM



☀️ **Spring is here, time to bike!**

Bikes are fun & a fantastic way to maintain your health



Matco Org

12:27 PM



🏆 **Would You Miss Our Biggest Event?**

We only do it once a year, and it won't be the same without



Matco Church Bookstore

12:27 PM



📖 **Read Along Tuesday!**

Bring your little ones as we'll be reading together



Personalization

- Personalized promotional emails
- Typically receive an 11% higher open rate



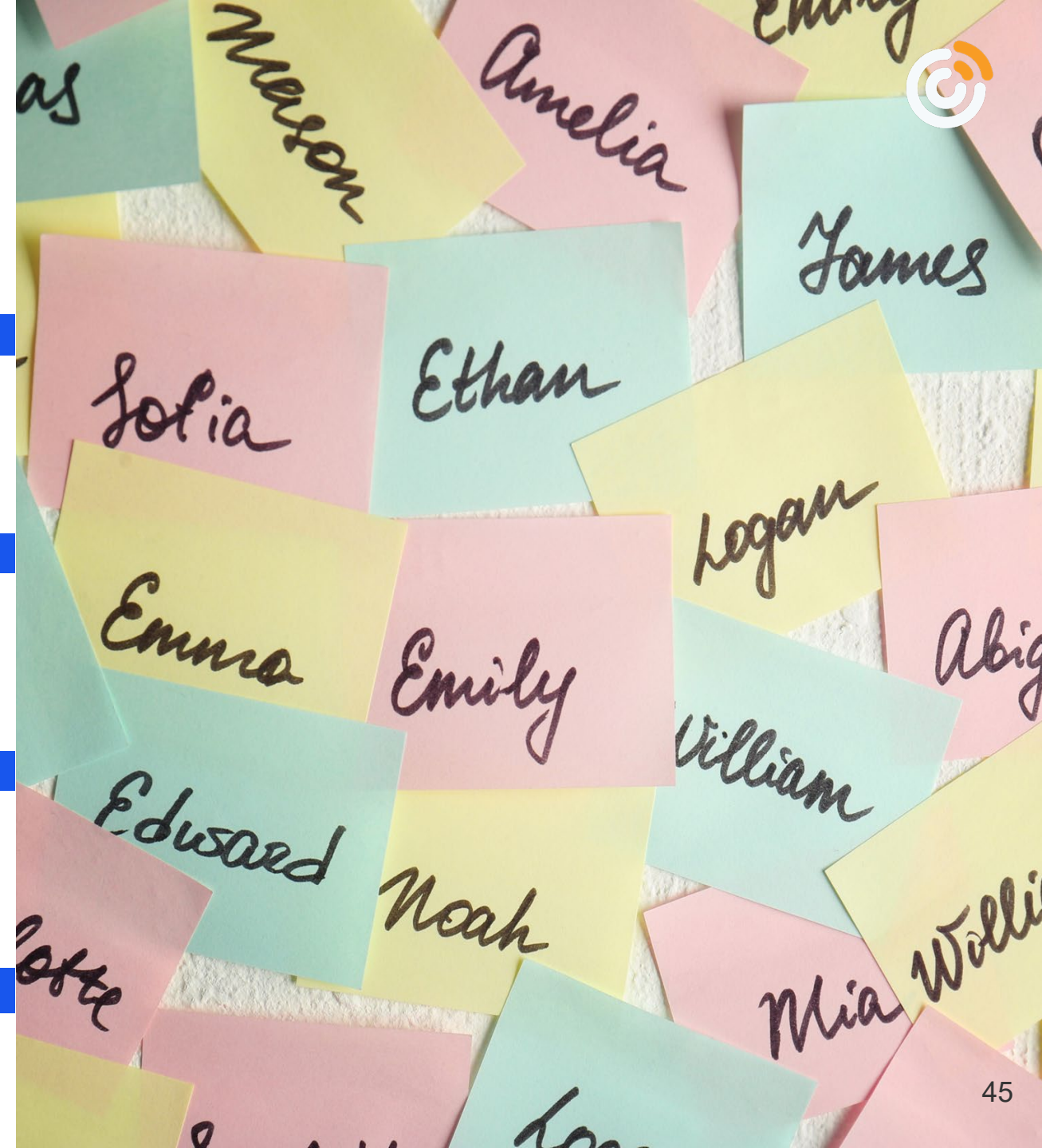
Matco Service Awards 12:27 PM
Susan, It's Your Time to Shine!
We need you to be apart of the movement again



Matco Health Committee 12:27 PM
We've got a secret for you, Elizabeth!
You + us = awesome, but it does require



Matco Association 12:27 PM
Stan? Are you ready?
We've always counted on you as a pivotal part of our team

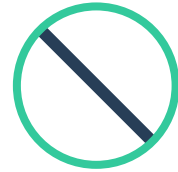




Things to Avoid



Check the language



Avoid words like :

- “Sp a m ”, “Cre d it Ca rd”, “We igh t Lo ss”
- ALLCAPITALLETTERS
- Excessive punctuation (???,...,!!!)
- \$\$\$ and other symbols



Test Your Assumptions

Helping you grow, together



Constant Contact has partnered with Qgiv to offer you exclusive savings.

Save
30 %/mo for 3 months
on our Email or Email Plus plans.

Get started today!

[bit.ly/ctct - qgiv](https://bit.ly/ctct-qgiv)



Questions?



This webinar program qualifies for 1 point of continuing education toward maintaining the Certified Fundraising Executive Management (CFRE) credential.



Thank you for joining!

For more information on Qgiv's fundraising platform, contact:

contactus@qgiv.com | 888-855-9595

For more information on Constant Contact, contact:

partnersupport@constantcontact.com | 855-225-1276