Marketing Automation in the Nonprofit Sector

It's All About Relationships

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About the Author

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The smart agency understands that the nature of marketing has shifted from mass messaging to personalized engagement. Where many firms still practice mass marketing, you know better and understand that the most relevant strategy focuses on one-to-one engagement marketing, delivering valuable content and insights that inform and inspire your intended audience.

Applying the principles of marketing to solving communication challenges within the nonprofit sector requires a shift in thinking and practice.

Agencies must move from promoting the message, features, and benefits to understanding the narrative and the roles within that narrative in order to successfully use marketing automation for the nonprofit and foundation sector.

Applying the principles of marketing to solving communication challenges within the nonprofit sector requires a shift in thinking and practice.

Using Marketing Automation to Attract, Inform, Inspire, and Engage

Imagine that your goal is more than marketing. Instead, imagine that your goal is to build relationships through engagement.

Engagement marketing allows you to develop deep affinity and meaningful relationships with your intended audience over the long run.

In the nonprofit sector, this begins with understanding the cause, the organization, the culture of the organization, and the complexity of the cause or issue. Then incorporate marketing automation, and you'll have everything you need to build strong, engaged relationships – and ultimately arrive at stewardship.

While traditional marketing tends to be a one-way transactional exercise that drives one-way interactions, marketing automation allows you to engage your audience through meaningful conversations and foster long-term relationships and stewardship. Traditional marketing has the potential to be superficial; engagement marketing allows you to develop deep affinity and meaningful relationships with your intended audience over the long run.

Marketing is just one component of your nonprofit client's comprehensive communications strategy. The most successful mission-driven organizations focus on nurturing relationships; smart agencies recommend marketing automation as an important element of campaigns and one which can be integrated with an engagement continuum.

What's an Engagement Continuum?

Lead generation and marketing automation reference "funnels," which map the path an individual follows from lead to conversion.

For the sake of the nonprofit sector, you must change that language. The

supporter's journey is a continuum; the individuals are not always "leads." As marketing professionals, we often forget that those whom we are trying to convince and persuade are people with feelings, filled with love and affinity for a cause they care about, who long to become part of a story greater than themselves.

The Engagement Continuum

Experience + Engagement

A nonprofit's supporters are advocates, ambassadors, and fans — people who believe in the mission or cause; they volunteer, donate, advocate, and take action based on their personal values and motivations.

An engagement continuum is the series of touch points between the mission-driven organization and its audience. The communications

strategy must be designed to attract, inform, inspire, and engage donors and stakeholders.
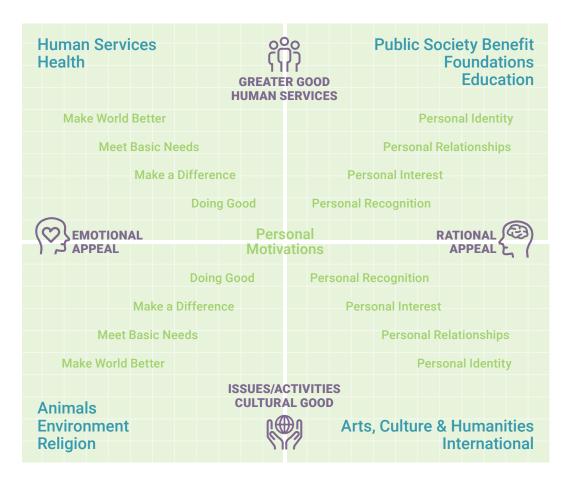
With this continuum, you will find what you know as "traditional marketing" to decrease, while relationship-building will increase. Don't panic — this type of thinking won't impact your work. Marketing automation can help you maintain continuity in a nonprofit's narrative to donors and stakeholders at any point along the continuum.

Experience + Engagement

TOUCH POINTS	ATTRACT	INFORM + INSPIRE	ENGAGE	
Publications				Marketing decreases while relationship building increases, leading to stewardship
Marketing				
Sponsorships		**Marketing decreases >**		
Video				
Web Site	STRANGERS	ACQUAINTANCES	COMMUNITY MEMBERS	
Mobile				
Social Media		**Relationship building increases >**		
Programming				
Events				
Mktg Automation				
		VALUES ALIGN TO ENGAGEMENT		

Segmenting Begins With Understanding Taxonomy

Now *there's* a word that probably wasn't in your marketing automation vocabulary until today. A taxonomy is simply a system of classification.

The [National Taxonomy of Exempt Entities](#) (NTEE) divides the nonprofit sector into 26 classifications, all of which fall within ten major categories, as shown here:

Human Services
Health

GREATER GOOD
HUMAN SERVICES

Public Society Benefit
Foundations
Education

Make World Better

Personal Identity

Meet Basic Needs

Personal Relationships

Make a Difference

Personal Interest

Doing Good

Personal Recognition

EMOTIONAL
APPEAL

Personal
Motivations

RATIONAL
APPEAL

Doing Good

Personal Recognition

Make a Difference

Personal Interest

Meet Basic Needs

Personal Relationships

Make World Better

Personal Identity

ISSUES/ACTIVITIES
CULTURAL GOOD

Animals
Environment
Religion

Arts, Culture & Humanities
International

This diagram is designed to help identify what messaging styles should be used when marketing for different causes. For example, if you are marketing for a health organization and want to go for a more emotional appeal, you should focus your messaging on making the world better or helping to meet basic needs. For an international organization, you might take a more rational approach and focus on personal relationships/identity.

Understanding why donors, volunteers, and stakeholders are engaged is essential to crafting an effective marketing automation strategy.

Do your research to understand why an organization's supporters believe in the cause and what motivates them. Understanding why donors, volunteers, and stakeholders are engaged is essential to crafting an effective marketing automation strategy.

For reference, NTEE classifications can divide into a quadrant, separated by general motivations on each axis. A diagram such as this is not an attempt to quantify motivations, but to help a marketing professional identify what mix of messaging may be appropriate for his/her cause, in the context of competing organizations. In general, people support causes, and not institutions.

Practically speaking, you will need to position your client's organization as the voice of the cause within a crowded and noisy marketplace. Some nonprofit causes appeal to the heart more than they speak to the mind. Others speak to the mind—to inform before they inspire—and appeal to personal factors.

Based on these classifications of nonprofit organizations, the intended audience is going to vary. For instance:

- **Private School:** Prospective parents, alumni.
- **Charity:** Volunteers, donors, community members, advocates.
- **Foundation:** Peer foundations, grantees, donors.
- **Association:** Prospective members, current members, affiliated organizations.

Education-based nonprofits are ideal candidates for a marketing automation approach that emphasizes value and relevance.

Marketing automation enables a series of touchpoints that can help organization leaders amplify their messages and maintain regular contact with their supporters (particularly in organizations without a dedicated marketing communications staff).

What Type of Nonprofits Benefit from Marketing Automation?

Education-based nonprofits are ideal candidates for a marketing automation approach that emphasizes value and relevance. Let's take a quick look at a private school that recruits students from pre-kindergarten through grade 12.

Their challenge was a 40% attrition of parents who chose the school's preschool for their children's first few years of education, then chose public schools for kindergarten through grade 12. Parents were making private school a first choice for preschool and a second choice for the majority of their child's education.

In this instance, the goal was to drive higher enrollment rates while also reducing attrition rates. To achieve this, the school implemented a marketing automation strategy that allowed it to (a) drive more open house and personal tour registrations to generate qualified leads, and (b) nurture those leads with content addressing their specific needs and concerns.

PRIMARY AUDIENCE

Attraction: Preschool through lower school, primary influencer is prospective student's mother.

The mother's primary concerns as she evaluates her school choice are focused on her child:

• Will my student be safe?
• Will my student be nurtured?

INTENDED ACTION

Sign up for open house or personal tour.

LEAD GENERATION STRATEGY

Drive open house signups through social media and one-to-one marketing.

Motive: Demonstrate to prospective parents that private school is nurturing, affordable, and a first choice for many families.

Marketing Automation for a Private School: A Summary

A lot of research went into arriving at these recommendations, summarized to the left in a lead generation strategy.

With this simple plan and context in place, content that addressed key concerns of parents was sent through a nurturing campaign over a two-week period. Although brief, the nurturing campaign delivered valuable content in response to both online and phone inquiries.

1. 5 minutes after start send the email "1 OB Safety". Repeatable
2. 4 days after start send the email "2 OB Confusing school choices". Repeatable
3. 1 week after start send the email "3 OB What is Christian Education?". Repeatable
4. 1 week 2 days after start send the email "4 OB Private Education with Reach". Repeatable
5. 2 weeks after start send the email "5 OB Great Day to be a Patriot". Repeatable

A two-week workflow that delivers valuable and informative content to prospective parents.

Key to success: This workflow is set up to be triggered through an inbound form or by when an admissions specialist adds a name and email address to a Google sheet hosted in the school's Google Drive account. Zapier, a third-party integrator, monitors the Google Sheet every 15 minutes and adds any new names it finds to a "Phone Leads" list in the marketing

automation platform, which then triggers the email workflow. The platform then notifies the admissions specialist when the workflow is complete, triggering a follow-up phone call.

Marketing Automation for Associations

Associations struggle with member engagement and recruiting new members. Marketing automation makes it simple to deliver nurturing campaigns that people will want to receive because the content they're receiving can add value to their work.

For the success of a long-term strategy, it's critical to start with a narrative that supports the members and punctuate the narrative with stories that add value. Publish content that is timeless. Focus on a story that your audience thinks is worth sharing, so they become part of your story and find something in your content that they're not going to hear anywhere else.

A platform such as SharpSpring drives the effectiveness of marketing campaigns, but it's your content strategy that will attract, inform, inspire, and engage.

Recruiting New Members

When an association sought to engage the presidents of organizations that employed the association's members, a brief series of articles was created to position the business officer as a strategic advisor in the eyes of the presidents.

Publish content that is timeless. Focus on a story that your audience thinks is worth sharing, so they become part of your story and find something in your content that they're not going to hear anywhere else.

1. just after start, or during next available business hours, send the email "**01 What your CFO Wants You to Know**". `Repeatable`

2. 1 week after start send the email "**02 7 Reasons your CFO needs your support**". `Repeatable`

3. 1 week 5 days after start send the email "**03 Is your business officer looking back or looking forward**". `Repeatable`

4. 2 weeks 6 days after start send the email "**04 12Ways Culture of Leadership**". `Repeatable`

A workflow that delivers a series of promotional articles to organization executives and association members.

This initial nurturing campaign to presidents was intended to draw attention to the value of the business officer as a strategic advisor and raise awareness of the association. After the campaign had concluded, the same content was sent to members to encourage them to consider themselves as strategic advisors, and it contained articles that members could share as justification for membership in the association.

Welcoming New Members

When I talk about marketing automation to my clients, they laugh when I say, "Let's let the robots do the work."

The above association needed to create a welcome campaign for members, and an automated email campaign was not possible from within their membership management system. To welcome new members, the Executive Director needed to recreate an email for every benefit email he wanted to send, and he needed to remember to send them at defined intervals.

Repurpose existing content and workflows for multiple audiences, creating individual tasks and triggers for both inbound and outbound nurturing campaigns.

This challenge was easily solved with Google Sheets, Zapier, and a marketing automation workflow of eight emails that welcomed members, explained how to access the member portal, encouraged participation in webinars and events, and highlighted the online resources available to them.

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Using Marketing Automation for Volunteer Orientation

Volunteers are critical to the success of many organizations, such as food banks and health care systems. Marketing automation can help volunteer coordinators or community relations coordinators orient new volunteers and become more effective bridge builders.

How Marketing Automation Helps:

- **Communication must be a top priority.** Marketing automation allows you to deliver volunteer coordinator contact information and any other information the volunteer needs: who, what, when, where, and why. (Volunteers are making time to serve with a nonprofit despite having their own busy lives. Efficient communication of goals and expectations ensures they'll be fully informed and appreciated.)

Use marketing automation to coordinate, deliver information and recruit.

Who will I be working with?

When is the next volunteer event?

What time should I be there?

Will I need to use my own vehicle?

- **Delivering volunteer orientation via automation makes it easy to volunteer.** Nonprofits should not place unreasonable expectations for training or preparation of volunteers. Marketing automation can be used to deliver the resources they will need to be effective, keeping in mind training and preparation time is part of their volunteer experience.

- **A marketing automation campaign can be used to recruit volunteers** by delivering a series of emails and videos (on landing pages, with volunteer sign-up forms) previewing the volunteer experience. This approach attracts, inspires, and engages!

At the end of the day, volunteers are "donors of time," which for some is far more valuable than money. A financial donor can earn more money, but a volunteer is giving time – and we all know there's never enough of it.

Communicating Impact Through Marketing Automation

Donors are the lifeblood of any nonprofit. Marketing automation can be used to deliver timeless stories of impact, connecting the donor (or prospective donor) with the mission at every touch.

Nonprofits struggle with creating content (another need you can fill through your agency services), and they often overlook opportunities to re-purpose existing content, such as annual reports.

Many donors ask the same questions, so why not answer them with a series of emails?

Can you share examples of the impact you make?

I'm interested in joining your board. What do I need to know?

How does my donation make a difference?

How can I get involved with your cause?

Marketing automation is ideal for communicating impact and nurturing relationships. One marketing automation campaign on a nonprofit website can answer many questions, freeing up more staff to do its work.

Many donors ask the same questions, so why not answer them with a series of emails that further connect the donor with the mission of the nonprofit? Here is an example:

- How does my donation make a difference?
- Can you share examples of the impact you make?
  (A 12-month drip campaign)
- I'm interested in joining your board. What do I need to know?
- How can I get involved with your cause?

A marketing automation campaign can also be useful for:

- **Board Orientation** — A series of emails that welcomes new members, provides meeting schedules, introduces other board members, and delivers a PDF of the board handbook.
- **Special and recurring email marketing campaigns** — Many nonprofits settle for basic email marketing platforms, without understanding the benefits and advantages of marketing automation.

One of the major benefits of a marketing automation platform like SharpSpring is its ability to integrate with any content management system through a simple code snippet:

- The private school from our example above integrated the snippet through Google Tag Manager.
- It's simple to embed the snippet in a module that loads on every page in content management systems such as Joomla!.

For almost any nonprofit organization, marketing automation is ideal for delivering value-added content to members, donors, supporters, and stakeholders. It's a solution that fits the needs of your current nonprofit clients and opens the door for you to get engaged with many more worthy causes.

See how adding marketing automation to your agency's services can drive revenue from existing clients and help you add new ones. Schedule a demo with a partnerships specialist to chat about your specific needs.

Get a Demo

SharpSpring

SharpSpring is the marketing automation platform of choice for more than 1,000 digital marketing agencies and their 5,000+ clients. Since 2014, SharpSpring has provided its powerful marketing automation solution to businesses around the globe. In the short time since its inception, the company has gained significant market share from industry leaders with its competitive pricing, agency-focused business model, and robust platform.

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