

Crawl, Walk, Run: Email Strategies for Every Stage of Marketing

A Case Study of Trial and Error

Vivian Reed & TJ Warfield

Session Hashtag: **#17NTCcrawlwalkrun**

Collaborative Notes: **<http://po.st/17NTCcrawlwalkrun>**

CAE/CRFE Credits: **1.5**

Are You In The Right Place?

What We're Gonna Cover

- Big picture of email strategy
- Phases of email marketing
- Save The Bay's learning moments

What We're Not Gonna Cover

- Specific email platforms
- How to do things in your database

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Vivian Reed

Communications Specialist
Save The Bay



 @SaveSFBay

TJ Warfield

Salesforce Technical Strategist
BrightStep Partners



 @tjwarfield



Crawl



Walk



Run

SAVE THE BAY

IMAGE: BELLYBELLY

IMAGE: VERYWELL

IMAGE: TJ WARFIELD

Circle Time!

- Where do you think you are?
 - Crawl – info sharing, throw spaghetti at wall phase
 - Walk – Don't Work hard, work smart – learn about your audience and org, and what it takes to engage
 - Run- automation and journey building
- What are your current plans for next steps?



IMAGE: CLIPARTKID

Ready to Run!

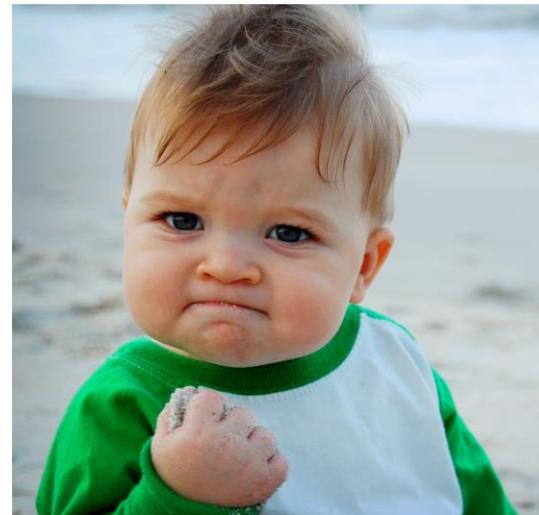
- 7 years to get to where we are
- Platform changes
 - 4 different email platforms
 - 4 different databases
- Changing goals and focus



IMAGE: TJ WARFIELD

Expect Bumps & Bruises

- The process from crawl to run is long, non-linear and filled with trial and error
- Throughout the presentation, we'll call out some of STB's Learning Moments
- Some growing pains and some successes, but we've learned and adjusted





Crawl

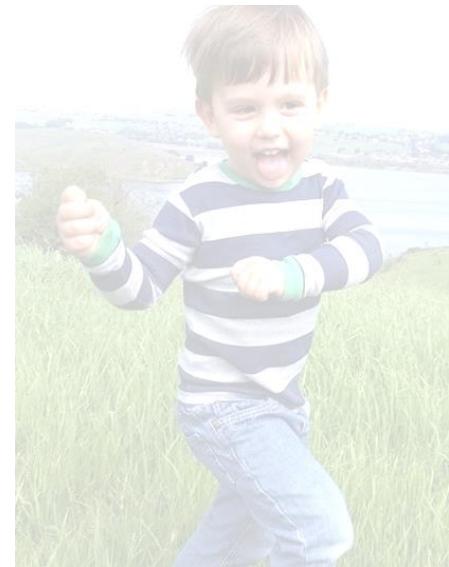


IMAGE: BELLYBELLY

IMAGE: VERYWELL

IMAGE: TJ WARFIELD

Crawl

- AKA Throw Spaghetti at The Wall phase
- Research industry standards
- Who do you want to be when you grow up?
- Get your list in Order

Crawl: Throwing Spaghetti Is Messy

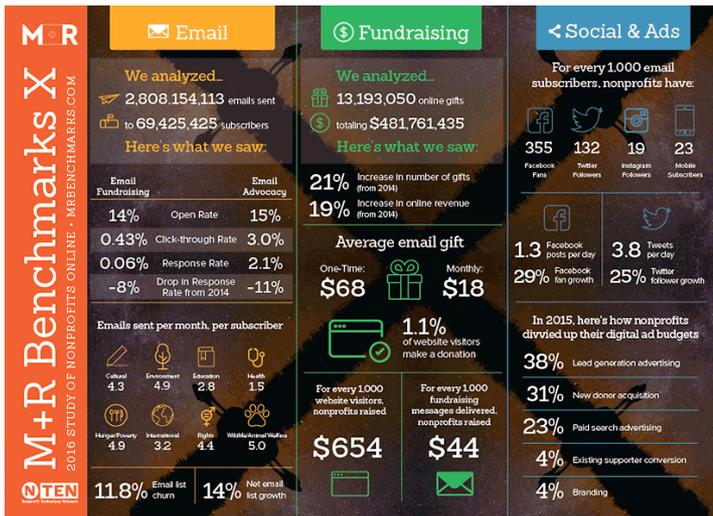
- Send to full list, blasting messages/ focused on sharing information
- Limited email platform
- Limited internal resources
 - \$\$
 - Staff time
 - Staff expertise
- Hard to track data



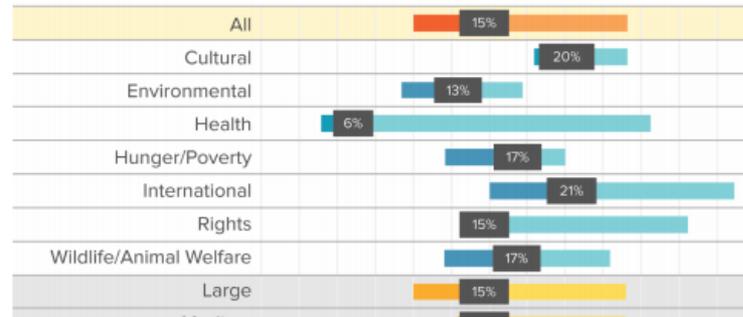
IMAGE: ALWAYSLADIES.COM

Crawl: Research Industry Standards

- Focus on your sector of nonprofit industry



Fundraising Page Completion Rates



Advocacy Page Completion Rates

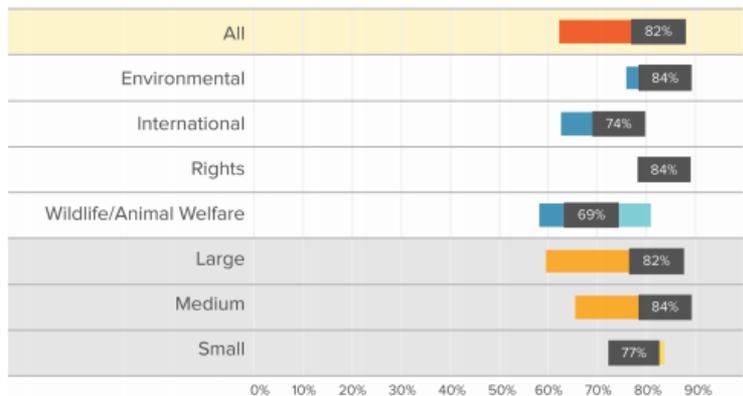


IMAGE: MRBENCHMARKS

Crawl: What Do You Want To Be When You Grow Up?

- How best to reach out to your constituents?
- Same message and frequency to MDs than email subscribers?
- Identify goals
 - Grow list? Communicate with important few?



IMAGE: LAKESHORE LEARNING

Crawl: Get Your List In Order

- Deduping
- Email append
- Email clean





Walk

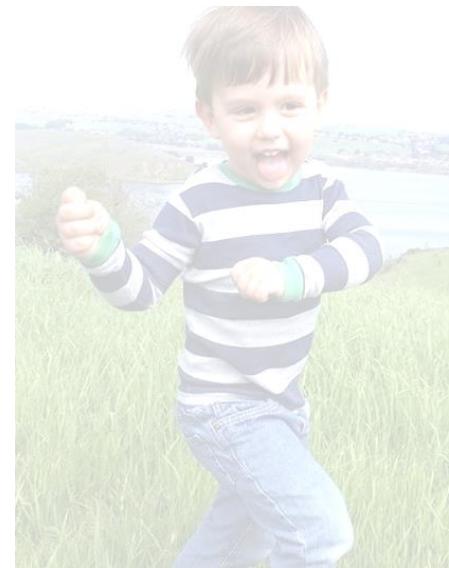


IMAGE: BELLYBELLY

IMAGE: VERYWELL

IMAGE: TJ WARFIELD

Walk: Don't Work Hard, Work Smart!

- Audience – Who are they?
- Try/Test everything with Intent
- Apply learnings



IMAGE: RICHVINTAGE/GETTYIMAGES

Walk: Walk With Intent

- Who's your audience
 - Interests
 - Demographics
 - Technology of openers
- Know Thyself
 - Identify short /long terms goals



Walk: What's the Point?

- Define 'Success'
- KPIs should be actionable
- Set benchmarks
- Do data collection & compare to benchmarks



IMAGE: MULBERRY BUSH

Save The Bay: Learning Moment!

KPI Overload



Audience Demographics

Key Segments: Engagement Type (Donor Action Taker, General Action Taker, Non-Responder), Initial Action Type (ACT, FTB, ACT, FOL, VOL, EWL, CUL, DON, N/A)

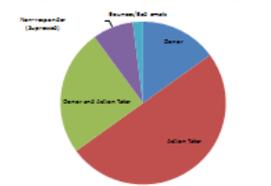
List Composition

Composition by Audience Segment	Q1	Q2	Q3	Q4	Req
Donor	45%	42%	51%	48%	45%
Relate Taker	58%	55%	62%	59%	58%
Donor and Relate Taker	25%	28%	18%	22%	25%
Non-responder (Repeat)	8%	5%	10%	8%	8%
Donor/Relate	2%	2%	1%	2%	2%

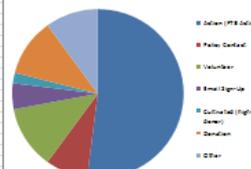
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Relate (FTB Relate)	22%	18%	25%	20%	22%
Relate Contact	8%	5%	12%	10%	8%
Volunteer	42%	45%	38%	40%	42%
Email Sign-Up	5%	6%	4%	5%	5%
Call to Action (High-level Demand)	2%	3%	1%	2%	2%
Donation	15%	18%	10%	15%	15%
Other	18%	15%	22%	18%	18%

Growth and Attrition	Q1	Q2	Q3	Q4	2014 Req	Breakdown
Growth Rate	18%	15%	14%	16%	18%	
Churn Rate	28%	28%	28%	16%		

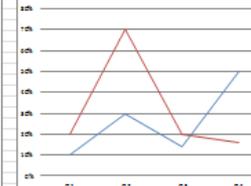
Average List Composition by Audience Segments



Average List Composition by Initial Action Type



Growth vs. Churn by Quarter



Email: Response Rate

Message Response Rate	Q1	Q2	Q3	Q4	2014 Req	Breakdown
Message Response Rate (General)	25%	18%	15%	18%	25%	
Message Response Rate (Fund)	18%	15%	7%	2%		

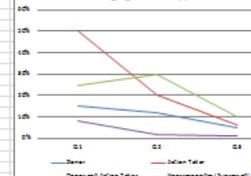
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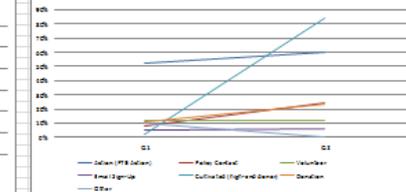
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Average Response Rates by Engagement Type



Average Response Rate by Initial Action Type



Web: Completion Rate

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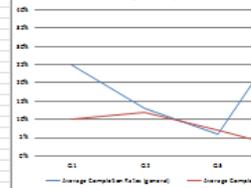
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Other	18%	15%	22%	18%	18%	

7% of list to track with these segments in an ideal world, but have a feeling that won't be able to actually segment people any further in the way."

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Donation	15%	15%	15%	15%	15%	
Other	18%	18%	18%	18%	18%	

Average Completion Rates



Email

KPIs:

- Open Rate
- Click Through Rate
- Response Rate
- Unsubscription Rate

Key Segments:

- Audience Demographics - Engagement Type, Initial Action Type
- Channel Health - Type of Ask, Email Provider
- Advocacy Campaign - New vs. Repeat

Save The Bay Learning Moment!

KPI Win

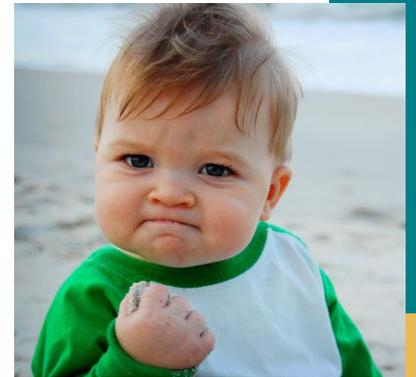
- Open rates offer window to understanding usefulness of tactics + messaging
 - Open rates
 - Click Through rates
 - Deliverability rates
 - Unsubscribe Rates
- Care about conversions
 - Dollars Raised
 - Action Rates



Save The Bay Learning Moment!

List Growth = Attrition

- Face palm if growth is goal
- But sometimes less is more
 - Full STB list = 69,006
 - News and Updates list = 26,663



Walk: Get Audience Specific

- Segmentation
- List Suppression
- Subscriber Management & Manage Preferences

Walk: Segmentation

Who DO You Want to Talk To?

- Putting people into buckets
 - Interest/ Issue based
 - How they engage
 - Donor
 - Action taker
 - Volunteer
 - Partner

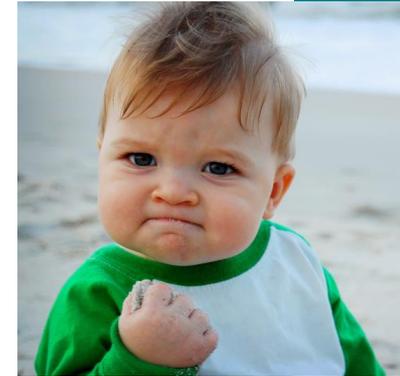


IMAGE: XAPIER

- People can be in more than one bucket
- Streamline and standardize

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Segmentation



SAVE THE BAY

- STB Action Takers
- STB Donors
- STB residents in X county

SAVE THE BAY
ACTION FUND

- STBAF Action Takers
- Measure AA Endorsers
- STBAF Donors
- STBAF Residents in X county

Walk: List Suppression

Who DON'T You Want to Talk To?

- Segments
- Nonresponders
- Not just about the saving money in # of emails or sends
 - Start finding and focusing on engaging those that ARE interested



IMAGE: VERTICAL RESPONSE

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Nonresponder Re-engagement

- Don't assume people don't care
- Latest reengagement email resulted in **567 opens and 6 donations**



BAY ALERT! Urgent Action Needed.



This Quarter		Sent	Opens	Clicks
 FY17_March_Email 4_Appeal 6_CNR 5 plus	9.06K	185	20	
<small>HTML sent by Devo Team on Fri Mar 10 2017 4:30 PM PDT</small>				
 FY17_March_Email 4_Appeal 6_CNR 4-5	5.51K	104	5	
<small>HTML sent by Devo Team on Fri Mar 10 2017 4:00 PM PDT</small>				
 FY17_March_Email 4_Appeal 6_CNR 3-4	8.90K	144	5	
<small>HTML sent by Devo Team on Fri Mar 10 2017 3:00 PM PDT</small>				
 FY17_March_Email 4_Appeal 6_CNR 2-3	7.74K	118	5	
<small>HTML sent by Devo Team on Fri Mar 10 2017 2:23 PM PDT</small>				
 FY17_March_Email 4_Appeal 6_CNR 1-2	2.66K	16	2	
<small>HTML sent by Devo Team on Fri Mar 10 2017 1:19 PM PDT</small>				

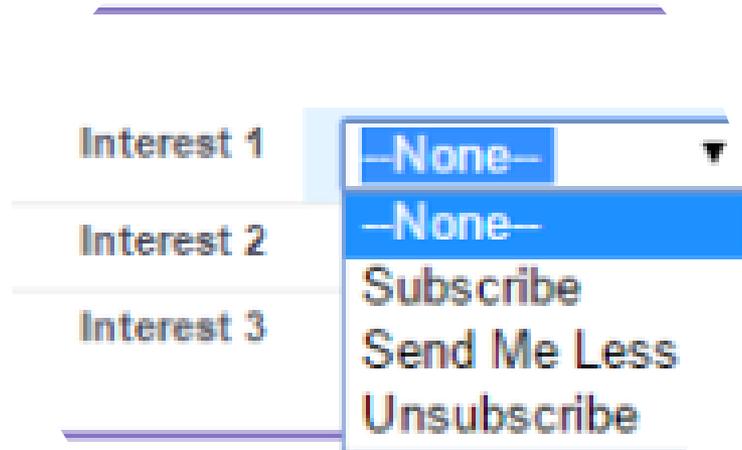
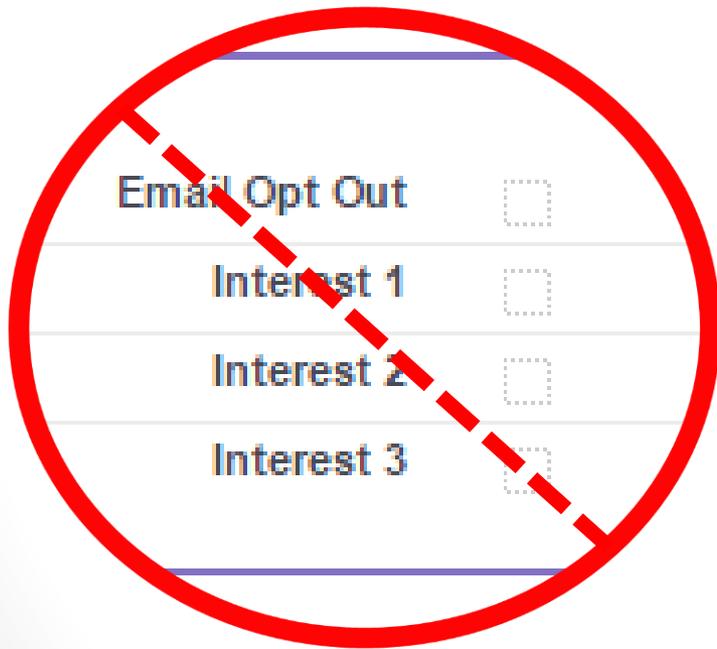
Walk: Subscriber Management

Give Them The Control

- What does each person want to hear about?
- What don't they want to hear about?
- How often do they want to hear from you?
- Better way to reach the audiences we want to reach so we can be more effective

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Subscriber Management



Save The Bay Learning Moment!

Manage Preference Page



- In the last calendar year 1,031 managed their email preferences

SAVE THE BAY

ABOUT US | BLOG | CONTACT

Prevent Pollution | Restore Wetlands | Educate | Get Involved

DONATE

Manage Your Preferences

Email Address *

News and Updates

- ◊ Subscribe
- ◊ Send Me Less
- ◊ Unsubscribe

Fundraising Emails

- ◊ Subscribe
- ◊ Send Me Less

Volunteer Opportunities

- ◊ Subscribe
- ◊ Unsubscribe

Unsubscribe from all Save The Bay emails

SUBMIT

Manage Your Preferences (Unsubscribe) | Donate | Take Action | Volunteer

Save The Bay | 1330 Broadway, Suite 1800 | Oakland, CA 94612-2519
www.savesfbay.org | 510.463.6850

Walk: Let's Talk A/B Testing

- Test ONE thing at a time
- Test with intent
 - Blind tests waste time!
- Apply learning to future

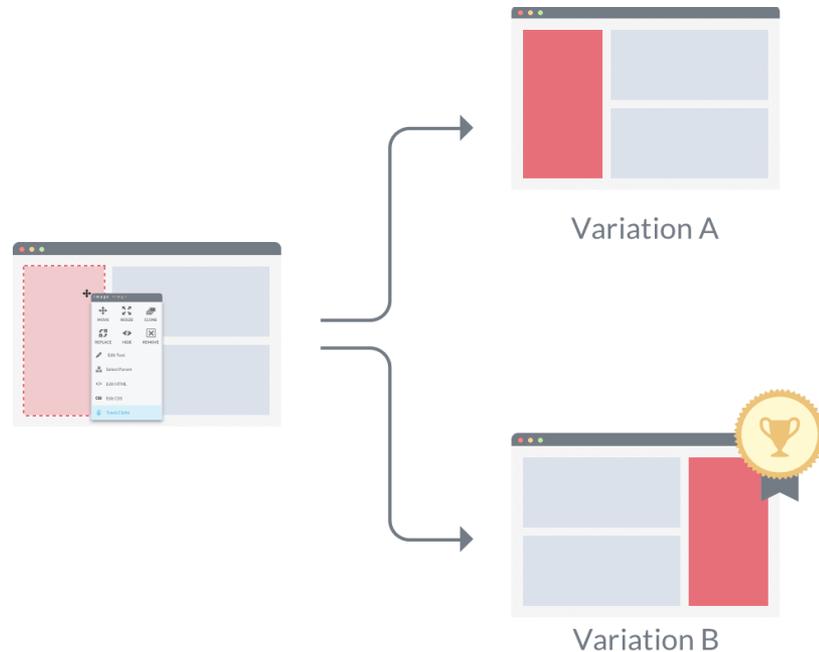


IMAGE: VISUAL WEBSITE OPTIMIZER

Save The Bay Learning Moment!

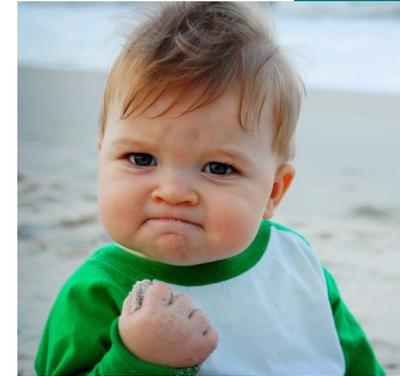
A/B Testing

Subject lines:

“BREAKING: Trump slashes EPA funding”

v.

“Bay under assault from Washington, D.C.”



A/B Email Test FY17 March EPA Budget Subject Line Test Help Close

Test Name: FY17 March EPA Budget Subject Line Test
Test Description: FY17 March EPA Budget Subject Line Test

Distribution List(s)

Send To: Staff and Board Seed List 47 records
 Fundraising - Current (No MDs, no SF Non-Responders) 2227 records
 Fundraising - Lapsed (no MDs, no SF Non-Responders) 2964 records
 Fundraising - Non-Donor (No MDs, no SF Non-Responders) 20653 records

Suppress Against: Current Drip TY Series (FUND) 44 records
 Current Volunteer TY 1 records
 Current Welcome Series Members 88 records
 Salesforce Saved Report: Gift Suppressions with Contact ID 895 records
 Major Donor Suppression Bird Email 68 records

Attach sent notes to contacts or leads from my CRM lists.

Testing Results

Sent on Thu Mar 16 2017 10:10 AM

	Sent	Opens	Clicks	Opt-Out	
A					
 FY17_March_RR_Pruitt_Full List BREAKING: Trump slashes EPA funding Sent By updates@savesbay.org	4272	901	15	2	✓
B					
 FY17_March_RR_Pruitt_Full List Bay under assault from Washington, D.C. Sent By updates@savesbay.org	4272	909	11	6	

Final Results

Sent on Thu Mar 16 2017 12:10 AM

	Sent	Opens	Clicks	Opt-Out
A				
 FY17_March_RR_Pruitt_Full List BREAKING: Trump slashes EPA funding Sent By updates@savesbay.org	15078	3426	65	17



IMAGE: BELLYBELLY

IMAGE: VERYWELL

IMAGE: TJ WARFIELD

Run: Targeted Journey Building

- Walk folks through a path of engagement
- Everybody gets a score!
- Automate the conversation



**YOU GET A SCORE!
YOU GET A SCORE!**

YOU ALL GET SCORES!

imgflip.com

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Scores

- Just starting with this
- Gives us an idea of what we're doing and how effective we are
- Give us a base number we can all agree upon
- Easiest metric you can establish for yourself
- Makes segmenting easier
- Where we hope to go with this?



Run: Automating the Journey

- Welcome Series
- Drip Campaigns



This is the part you WANT robots to take over!

Run: Welcome Series

Make a Good Impression

- Welcome folks to your organization
- Give them a reason to stick with you
- Keep them OUT of the rest of email communications

SAVE THE BAY



Dear Friend,

We call this place the *Bay Area* for a reason: Our lives, our communities and our streets are all connected to the Bay.

If you love San Francisco Bay, Save The Bay's community is for you. We don't take the beauty of this amazing place for granted. Stick with us, and we'll let you know about some of the Bay's most amazing people and places, and also share fun, easy ways for you to get involved, whether it's out on the shoreline or online.

In the meantime, how about showing the Bay some love by following us on [Facebook](#), [Instagram](#) or [Twitter](#)?



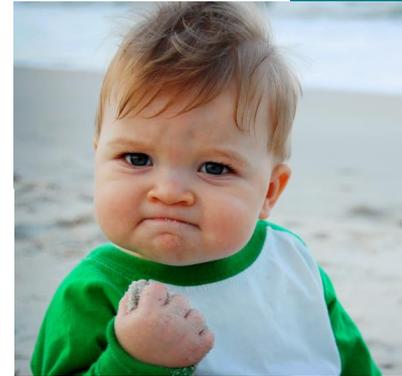
With appreciation,

David Lewis
Executive Director
Save The Bay

P.S. Make sure our emails keep landing in your inbox by [adding updates@savesbay.org](mailto:addingupdates@savesbay.org)

Save The Bay Learning Moment!

Welcome Series Automation



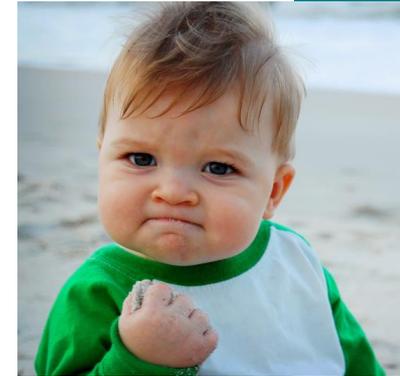
Program / Welcome Series

Overview **Steps** Messages Details

		Waiting	Completed	Deleted	Exited
A-1	 Send Welcome #1		8,106	0	0
A-2	 Wait 1 week	41	7,930	135	0
A-3	 Send Welcome #2		7,930	0	0
A-4	 Wait 1 week	48	7,803	79	0
A-5	 Send Welcome #3		7,803	0	0
A-6	 Exit the Program			0	7,803

Save The Bay Learning Moment!

Drip Campaigns



Program / TY Drip

		Waiting	Completed	Deleted	Exited
A-1	▶ If Contact already received Drip Marketing this year - exit		985	0	0
B-1	▶ Exit the Program			0	0
A-2	▶ In the Welcome Series		986	0	0
C-1	▶ Go to A3		129	0	0
A-3	▶ NOT in the Welcome Series		857	0	0
D-1	▶ Go To A4		857	0	0
A-4	▶ Wait 10 Days to clear Welcome Series	13	87	29	0
A-5	▶ Wait 1 Days after Donation	1	942	1	0
A-6	▶ Send Anya Email Message		942	0	0
A-7	▶ Wait 3 Days	9	930	3	0
A-8	▶ Send 2nd (Matching) Email Message		930	0	0
A-9	▶ Wait 5 Days	19	672	239	0
A-10	▶ Gift Size Check - Under \$120 gift?		672	0	0
E-1	▶ Sustainer Ask		589	0	0
E-2	▶ Exit the Program			0	589
A-11	▶ Exit the Program			0	83

Run: It Doesn't End Here



Run: Freedom!!



IMAGE: PARENTS

There's More To It Than Tactics

Don't Forget Your Leadership



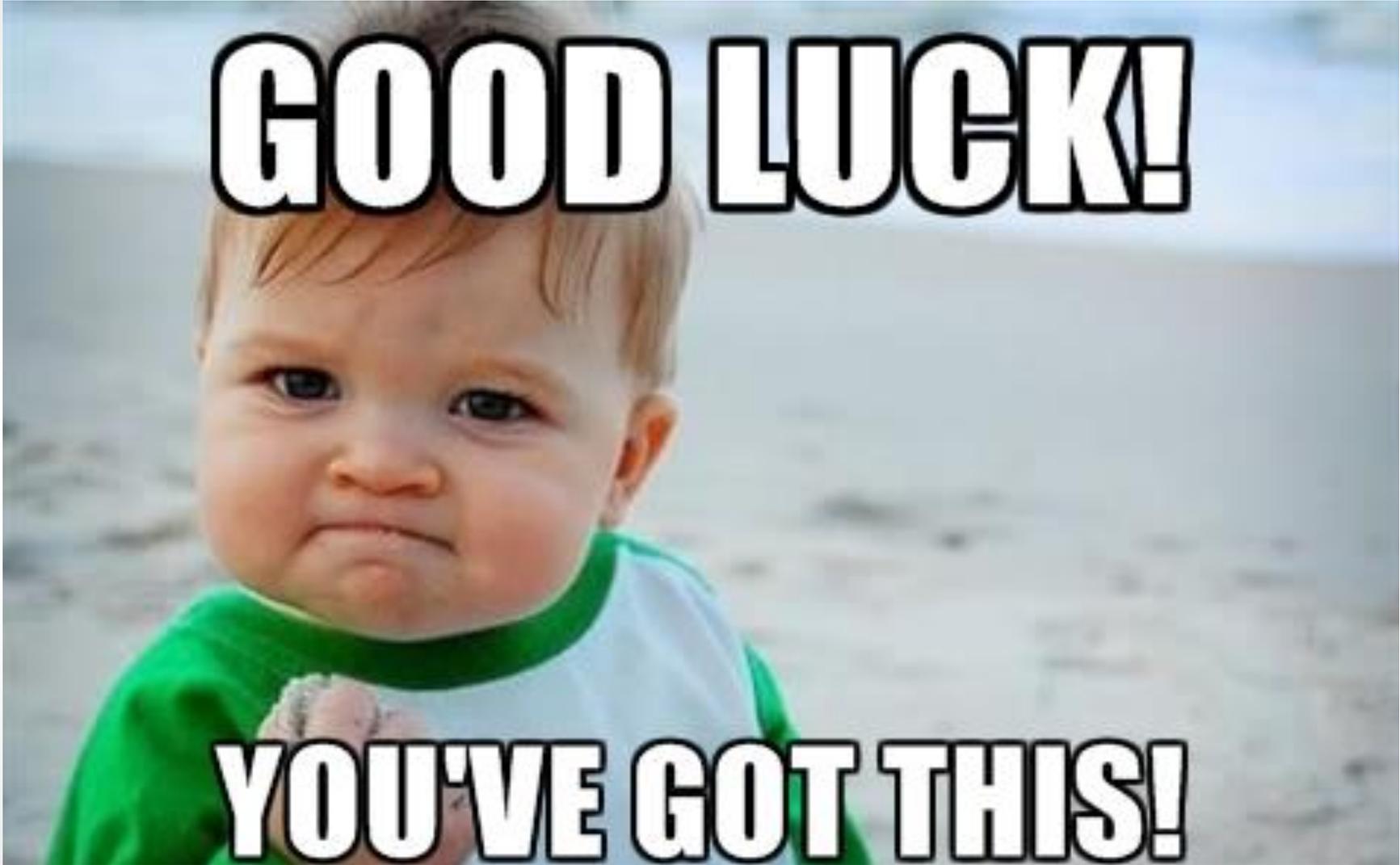
Circle Time!

- Reflect on your current plans for next steps – have they changed at all?
- What are 3 concrete actions you can take to bolster your email marketing today?



IMAGE: CLIPARTKID





GOOD LUCK!

YOU'VE GOT THIS!