ULTIMATE GUIDE TO

Marketing Automation for Nonprofits

iMission

The Ultimate Guide to Marketing Automation for Nonprofits

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iMission Institute is a social sector marketing agency and a nonprofit technology consulting firm. We offer marketing and technology strategy consulting as well as campaign and technology implementation services. Our clients include nonprofit organizations, health and human services, schools, municipalities, and social enterprises.

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Introduction

What is marketing automation and why does your nonprofit need it?

Let's take a step back and consider how the world has changed in the way businesses and brands communicate with us, their customers.

If this were 30 years ago, you'd have limited options. You could head to a brick-and-mortar store or you could wait for the holiday catalog. If you had a complaint or a question, you called a phone number. Maybe you wrote a letter to the customer service department if you wanted to make a point.

Today, your experience is vastly different. You follow a brand on Instagram. You get emails about upcoming sales and text messages when your order has been shipped. You interact with chatbots on their website and you tweet at their customer service team when you want something resolved.

Chances are, you never make a phone call. And you can't remember the last time you placed an order through a paper catalog.

Modern buyers are multi-channel communicators. They expect every digital channel to be open to them. They bring this same mindset to the way they engage with nonprofit organizations.

Savvy nonprofits need to communicate on a variety of platforms to reach their donors and clients: Social media posts, YouTube videos, email newsletters, SMS messages, blog subscriptions, and more.

But how? You can't be everywhere at once. You've got limited staff and limited resources. Marketing automation applications are your secret weapon.

They are the multiplier that helps you send the right message through the right medium to the right person — at just the right time.

The right marketing application can help streamline your communication, making it, at the same time, more robust and more simple.

The following guidebook is your companion to getting started. This is your roadmap.

We will help you understand the strategy behind your digital outreach, and we will walk you through a variety of tools, features, and use cases so you can find the right platform to multiply your impact.

It's time to do more good.

Marketing Automation for Nonprofits: The Strategy Behind the Technology

They're out there by the hundreds, maybe by the thousands. Your potential donors. These are people who are sure to be moved by your mission. They are certain to be compelled by your cause.

But they might not even know you exist.

Even if they do, without a clear plan to bring them from the "awareness" stage to the point where they are ready to give, these potential donors will stay in the periphery, never moving forward and taking action.

The path to individual philanthropy is, of course, individual. But in most cases, it is a long journey with many touchpoints. Not many donors are going to open up their pocketbooks the first time they hear about your organization — especially not for a large donation.

Marketing automation software lets us nurture our audience members, sending them specific messages and prompting specific actions, depending on whatever criteria we determine.

In the following chapters, we'll walk you through the strategy behind marketing automation so you can see how the right software application can help you turn a potential donor into a true ambassador for your organization.

Your fundraising engagement strategy

The for-profit world has long used the image of a funnel to describe a customer's journey. The top of the funnel, where it is widest, represents the full audience — everyone who has been reached by the brand's marketing efforts. Of those, some will move down the funnel to become contacts. Some contacts will become leads. Some leads will move down to become customers.

Nonprofits can use a similar funnel analogy to plan their marketing and track their engagement.

Imagine it like this:

Each section of the funnel represents a different stage in a patron's progress. At each stage, some opt out and some move forward.

And just like repeat customers in the for-profit world, your relationship with each donor doesn't end with a single donation. Some donors become true ambassadors who donate regularly, volunteer their time, and rally others to the cause.

Remember that it's called a funnel for a reason. Not everyone passes from one stage to the next. There are fewer prospects than there are visitors, for example. Fewer leads than there are prospects. And, although we've made the "advocates" and "ambassadors" stages bigger in the diagram, that's because of their outsized influence, not their actual numbers. Of all the stages listed, you will have the fewest ambassadors — but they are of enormous importance.

But for now, let's turn our attention to the very top of the funnel and examine how each group moves into the next.

Visitors

The top of the funnel starts with Visitors, but don't just think of them as **visitors** to your website. These can be people who come across your content anywhere. They might like your social media posts or watch your YouTube videos, or they might come to your actual website.

The idea behind your marketing should be to attract as large a number of visitors as possible — at least within reason — and invite them to take a low-stakes action (think: signing up for your newsletter) in exchange for their contact information. This way, you get them to engage with your organization in a way that doesn't feel overwhelming.

However, be sure that you're providing value and building trust from the earliest stages. Spamming an inbox or rushing them forward are certain to do more harm than good.

Once you have a visitor's contact information, you can track their behavior on your site, put them into email nurture campaigns, and keep them engaged with your organization. Once they've crossed this threshold, they become prospects.

Prospects

Some **visitors** will become **prospects**, and it's up to your organization to determine what criteria differentiates one from the other.

In some cases, a visitor might opt in to becoming a prospect. Maybe they check a box saying they want to be contacted about a certain program. Maybe they download a specific resource.

In other cases, you can use your CRM's lead scoring functions to evaluate when someone crosses over. Lead scoring works by assigning value to certain website-related actions. Once a visitor reaches a certain score, they pass from a visitor to a prospect in your contact list. For example, it might be because they visit a certain number of pages or return to your site a certain number of times.

Your prospects have shown that they may want to contribute to your cause, and you should communicate with them in a way that builds interest, confidence, and trust.

For example, if you're a local land trust, you might send out information about a new property, or a recent trail clean-up effort. The right communication will build a strong relationship that allows the prospect to see your organization as trustworthy and vital. At this point, you're "earning the right to ask" for them to take meaningful action in the future.

Leads

An engaged **prospect** can become a **lead**. A lead is someone you can compel to take a meaningful action — like making a first financial donation.

This is an important touchpoint, and you don't want to get it wrong. Asking for a donation too early can destroy trust, asking too late can mean you miss your window. The key is making it easy for leads to donate on their own terms, whether they want anonymity or recognition, whether they prefer Venmo or dropping a check in the mail.

Engaged contacts

A single action is nice, but that's a one-time thing. A second action means so much more.

Once someone donates a second time, they've crossed into different territory. We call these **engaged contacts** because they are engaged with the mission of your organization. Likely, they see your values aligning with their own, and, if you nurture the relationship, they could give repeatedly over the course of their lifetime.

Engaged contacts deserve an elevated level of attention.

With the right strategy, you can turn someone at this stage into a true advocate for your organization who spreads word-of-mouth endorsements to family and friends.

Advocates

Engaged contacts transform to **advocates** when they eagerly search for new ways to support your organization. Think of a donor becoming a volunteer, or a volunteer becoming an organizer.

Savvy organizations help advocates find ways to be a part of the effort.

Ambassadors

At this point, the relationship has reached its zenith. True **ambassadors** are deeply committed to your organization — spreading goodwill and rallying their networks to your mission. In many cases, they see your cause as a movement that's deeply personal to them.

Your ambassadors are your superstars. They will proudly represent you and your organization, and they are vital to your long-term growth. Remember, no marketing in the world is as powerful as word-of-mouth, and a single engaged ambassador can bring in more prospects than dozens, even hundreds of ads.

With these details spelled out, let's take another look at that funnel diagram, this time with explainer text included.

It's easy to think of marketing as a broad-based approach designed to spread the word about your organization. And it is, but if you only focus on top-of-the-funnel content, you'll spread awareness while ignoring the needs of other stages of the giver's journey.

As you're planning your marketing, use this diagram to develop nurture campaigns, social media content, reengagement efforts, and other approaches to grow your nonprofit.

With all that said, there are real opportunities that exist *beyond and outside this funnel*, as we've conceived it.

It's important to think creatively about how to reach that broad audience of potential donors.

The promise of potential donors

Think of those potential donors out there who have never heard of you or what you do. They are unaware of you — but you are equally unaware of them. At this point, there is no relationship.

In almost all cases, the donors will learn that you exist long before you learn that they exist. This is an important, but often frustrating, point. It means despite all the data offered by digital platforms, you'll still struggle to accurately track your reach.

For this reason, it is imperative that you invest in outreach and marketing to continually put yourself in front of would-be givers.

An emphasis on multi-channel marketing

To reach a diverse, multi-generational audience, you'll need to invest in multi-channel marketing that puts your message in front of the right people in the places where they spend time.

Sure, there are paid media type spots like social media and search ads, but that's just scratching the surface. Modern nonprofit marketing is more akin to PR. Think organic social content, appearances on podcasts and other programs, press and media coverage, user-generated content, and more.

Diverse marketing has a wide reach — and authentic marketing builds trust and fills the funnel. As you plan your strategy, think creatively about the ways a person can learn about your cause.

The importance of discovery platforms (i.e. social media)

When you type a question into Google, you have some idea of what you are looking for, even if it's vague. You have some need that's brought you there.

When you are on social media, you're in a different headspace. Social media, broadly defined, is about discovery, not about searching.

You're there to scroll through and see what you find, based on your likes, your demographics, and the accounts you've connected with. That means you get served up a feed that includes organic content, recommended content, and ads.

It could be a video of your sister's vacation, a political donation request, and pictures of a humanitarian crisis, all back to back. But that's what you expect because you're in a mindset to discover.

Marketers call social media sites discovery platforms.

Content that lives on discovery platforms can reach people who are in a different mindset from the search engine user.

They're pre-awareness.

This makes social media a goldmine for connecting to those potential donors who have no idea your organization exists.

The right social content can fill the top of the funnel with those elusive potential donors who have the potential to become your next ambassadors — once they learn you exist.

The long journey of the future ambassador

Imagine a large park in the full splendor of summer. The air carries laughter and birdsong. Huge trees dot the grassy landscape, offering shade for picnics. Those grand old trees are precious, yet they're vulnerable to storms and insect damage.

If you lose that massive spreading oak tree, the park will never be the same. It will take a hundred years to grow another just as big.

The wise park ranger knows this — and knows that you always need to be planting new trees so that the ones to replace the big ones are not so far behind. A healthy park is full of trees, some big, some small. As one park ranger once put it, only one quarter of your park's trees should be in the last quarter of their lives. The rest need to be younger so that when one dies, whether big or small, its loss is not so significant. The park remains. If a park is full of late-stage trees and nothing else, the park is in peril.

A nonprofit with an older base of ambassadors is equally perilous.

Your donor base, like the park, requires constant effort.

At all times, you must be working to spread awareness to the masses, bringing them into the fold. At the same time, you need to build trust with the top-of-the-funnel audience, inspire action among your prospects and leads, and guide your advocates and ambassadors to make meaningful contributions.

That ambassador whose patronage is so critical to your success was once a person who had never heard of you.

The right marketing plan shepherds future ambassadors through all stages of the giver's journey, just as the park ranger plants trees today that will not offer shade for decades.

How Nonprofits Are Using Marketing Automation for Fundraising

The largest nonprofits in the U.S. could make the Fortune 500. These organizations command multi-billion dollar budgets and massive resources, and they have become household names: The United Way, Habitat for Humanity, The Red Cross.

Organizations of this size have deep pockets for marketing and outreach, and they rely on their name recognition and well-established identity. They are trusted, highly-regarded brands, and this, in turn, helps them fundraise, build partnerships, and continue to grow.

And then there is everybody else.

According to The Urban Institute, there are roughly 1.8 million nonprofits in the U.S., and the vast majority operate with an annual budget of less than $500,000.

For most nonprofits, resources are scant, and every marketing dollar must be spent wisely.

To engage a full donor pool, nonprofits use marketing automation software to keep up their engagement with donors so their funding keeps rolling in.

Marketing Every Stage of 'The Donor's Journey'

It's tempting to think of marketing as a broad-minded approach that's focused on building awareness with the largest audience possible. And while building awareness is a vital part of marketing — you need people to know you exist, after all — it's equally important to build urgency so that the people who already know you exist are compelled to give.

As we discussed in the last chapter, this is full-funnel marketing — and to do it effectively you need some technological assistance.

Marketing automation can help you with:

- Broad, audience-building efforts (think: scheduling social media posts)
- Steady engagement tactics (think: sending out your weekly newsletter)
- Workflows that target visitors who complete certain actions (think: sharing a viewbook when someone fills out a form)

And a whole lot more.

Automation tools like HubSpot, Salesforce's Marketing Cloud, and Mailchimp Automation can help you engage with a wide range of contacts, from top-of-the-funnel unaware prospects to current and past donors.

Here's what that looks like in practice.

Marketing Automation for Nonprofits

Modern digital marketing applications offer a range of tools to help you do your job better. With the rise of AI, these tools are getting even more user-friendly every day. With that ease, though, comes the danger of inauthenticity. An automated communication that feels inauthentic can do more harm than good for your brand.

With that caveat, here's how you can use marketing automation for nonprofit outreach and engagement.

Automation Tools

CRM and Automation Systems

Many nonprofits use Customer Relationship Management (CRM) systems to collect contacts and manage all donor information. The CRM is the single source of truth for the organization, tracking all engagement for each donor.

Marketing automation tools integrate with CRM systems, ensuring that donor data is up to date and synchronized across platforms.

Automation Tactics

Email and Text Campaigns

Email and text message campaigns are the core of marketing automation, and nearly everything else falls under this umbrella.

Wherever a contact is in their giving lifecycle, an email or a text message can be impactful: as a thank you for a donation, as an update on a recent campaign, or as a digital packet of information ahead of an event, to name a few.

Whatever the situation, automated email marketing and SMS texting campaigns can be set up to deliver timely messages to donors and supporters.

But perhaps the most valuable use of email automation can be to remind past donors of the importance of donating again. These so-called LYBUNT donors (those who gave last year but unfortunately not this year) are a vital group that can be reengaged with the right email campaign.

Segmented Communication

Nonprofits can segment their donor and supporter lists based on various criteria such as donation history, demographics, and interests.

These segments allow you to send targeted messages and appeals to specific groups at specific times, making outreach feel more personal and timely. And, on top of that, your automation application can notify your team when a contact moves into a new segment based on actions taken (or not taken).

Other types of engagement (clicks, email opens, social follows), can be factored into the scoring system, even if the data comes from a third party source.

Social Media Automation

Nonprofits can schedule and automate social media posts to maintain a consistent online presence. Some automation applications do this natively, but additional tools like Sprout Social and Shield are well regarded and offer advanced functionality and insight.

Social media presence is crucial for spreading awareness about fundraising campaigns and engaging with supporters, but it's important to know where your core audience spends time online. If you spread yourself too thin, you might fail to make waves.

Social networks are a powerful way to spread awareness with marketing automation.

Event Promotion

Whether you're planning a black tie gala or a local trash cleanup, you need your audience to show up to your event.

Marketing automation can be used to promote nonprofit events through targeted email and SMS text campaigns, social media posts, and event registration management.

Automated event reminders and follow-ups can also boost attendance, donations, and post-event communications.

Lead Nurturing

Not every future donor who enters your database is ready to give right away. Some potential donors may have engaged with your content and expressed interest in your cause *but not yet donated*. In these cases, marketing automation can help you slowly build a relationship in a way that's appropriate and not too fast.

Lead nurturing could look different depending on your needs, but automated follow-up emails with the right content will keep these leads in the fold — and help them eventually turn into donors.

Automation Data and Insights

Marketing automation applications perform tests and collect data that can help you improve your outreach.

Data Analysis and Reporting

Marketing automation applications give aggregated insights into donor behavior and campaign performance. **Open rates, click-through rates, conversion rates**, and other metrics measure the effectiveness of your fundraising efforts.

Use benchmark data from past actions or other nonprofits to evaluate your campaigns, and then work to improve the metrics that matter most.

A/B Testing

Not sure what subject line to go with? Which email copy is best? Which layout will resonate? Test both! A/B testing allows you to isolate and assess a single variable.

Automation applications have testing defaults, but you can change the parameters to suit your needs.

For example, say you're hoping to boost open rates of your newsletter, so you want to tweak the subject line. Run an A/B test in which 20% of your audience receives Option A, 20% receives Option B, and the final 60% receives whichever option outperformed the other.

Better engagement means better results, and testing lets you fine-tune your marketing efforts.

AB TESTING

Donor Journey Mapping

The path toward philanthropy can be long and sinuous, so many nonprofits create donor journey maps to plan and automate donor interactions.

As site visitors become contacts, or contacts become leads, their relationship to your organization changes. When you map that journey and understand what decisions have to take place for someone to move from one stage to the next, you can deliver tailored content and messages at each stage.

Your Message, Your Donors, Your Growth

Whatever your mission, whatever your size, whatever your donation process, automation software gives you the tools to engage your audience with the right content at the right time. On top of that, you get whole dashboards of relevant data to help you improve your future efforts.

Most platforms and tools have sliding scale pricing — along with discounts for nonprofits. And a raft of tutorials and walkthroughs can help you get started.

Want more hands-on assistance? iMission is a registered Salesforce Consulting Partner specializing in social sector marketing. Reach out to talk with one of our experts.

How Marketing Automation Fuels Nonprofit Advocacy

For most nonprofits, success in advancing the mission happens not only because of the great programs and passions inside the organization. Success also depends on the right support from local, state, and federal governments.

Government support may include increasing (or defending) funding, updating out-of-date regulations, and, sometimes, securing broad system change.

Change is made through the power of persuasion, like lobbying — and yes, within limits, even 501(c)(3) nonprofits can lobby.

But our real power comes through grassroots advocacy. This is when we bring people together and deliver the right message at the right time to the right decision-makers. This is why nonprofit advocacy is a best practice for the most impactful organizations.

Sure, we still need to take it to the streets, but with technology, we can organize, mobilize, and advocate in new ways. Even small nonprofits can be effective. Voices that once went unheard can be amplified.

The collective grassroots voice is loudest when it echoes across digital channels – email, text, social, and search messaging – all released in a reinforced sequence. Marketing automation technology is the tool that enables and empowers organizations to pursue digital advocacy effectively. When integrated with your CRM, advocacy powered by marketing organizations can help turn grassroots advocates into donors and volunteers.

What is Grassroots Advocacy?

"Grassroots" is a term that gets thrown around a lot in the nonprofit space, so it's useful to define the term so we can all agree on what we're talking about.

Grassroots advocacy involves inspiring and mobilizing everyday people to promote and champion a cause. It is from the bottom up. A critical mass of supporters building momentum and influencing decision-makers to act. But grassroots advocacy isn't accidental. In fact, strategic organizing multiplies the effect of grassroots advocacy.

Essential Elements of Grassroots Advocacy

Grassroots advocacy doesn't just happen. It occurs because leaders at all levels organize, inspire, and unite.

- **Community Engagement:** Building and engaging a community of supporters who are (or who become) passionate about a cause.
- **Communication:** Creating lines of communication between organizers and supporters to keep them informed and engaged.
- **Coalitions:** Building alliances and partnerships with other organizations that share the same goals or have closely aligned missions.
- **Action:** Encouraging supporters to take specific actions, such as signing petitions, attending rallies, volunteering, or contacting their elected representatives.

How Does Marketing Automation Help Grassroots Advocacy?

Marketing automation allows organizations to streamline the way they communicate with their audiences. (See Ch. 1) The right technology can help you send the right message to the right people at the right time — and do so at scale.

Organizations use automation tools to organize their advocacy-related marketing, all while tracking engagement and collecting analytics.

1. Segmenting Your Audience

Use marketing automation tools to segment your supporters based on their interests, location, level of engagement, or any other factor. This allows you to send highly targeted resources, messages, and campaigns to specific groups of supporters at specific times.

2. Building Email Campaigns

Automation tools allow you to create and manage email campaigns to keep your supporters informed about important issues, upcoming events, and actions they can take. You can personalize these emails based on the recipient's interests and past activism.

3. Sending Action Alerts

You can send automated action alerts via email or SMS when there's a critical issue or event that requires immediate grassroots support.

These alerts can include pre-written messages or scripts for supporters to contact their elected officials or share on social media, for example.

Digital advocacy apps make it easy for people to take action, no matter their location. For example, if you enter your zip code, the app can direct your message to your specific elected representative.

4. Automating Social Media Posts

Automation tools can schedule social media posts that promote your grassroots campaigns. This ensures consistent messaging and outreach across different platforms. However, you'll have to be sure that your social media accounts are properly linked to your automation tools, as this kind of integration can be tricky to manage.

5. Analyzing and Tracking Performance

You'll need to measure the efficacy of your marketing efforts. You can do so with automation analytics, which can include everything from email open rates to form fills to social media impressions. This data can help you refine your messaging and focus on what works best for mobilizing supporters.

6. Uniting your Efforts

Automation tools (paired with a CRM) allow you to establish a ‘single source of truth’ for all of your advocacy marketing efforts.

A supporter might:
- Check your website
- Comment on your Instagram post
- Open your action alert
- Forward your newsletter to a friend

And you can see this activity in a single platform, with data shared between applications and collected in dashboards for your use.

Modern Grassroots Movements

The way people find and consume information is more complex than it’s ever been. Not only are we using a bevy of tools (search engines, social media, email, generative AI, and more); we’re also using multiple devices to access them.

Think about this:

> *A supporter gets a text message on her watch from a friend about an upcoming event. She opens her work computer to check for a Facebook post about the event, but she gets sidetracked by a work email. Later, on her phone, she’s scrolling TikTok and sees a post about the same event. She shares it in-app with another friend — who had already seen the same video on YouTube Shorts.*

And so on...

Multiple devices, multiple channels, multiple browsers, multiple profiles, multiple networks.

To adeptly stay top of mind for these busy, hyper-connected advocates, you need software that understands the complexity of modern communication.

The best automation tools will help you educate people about the issues affecting them and their communities.

With the right data, you can make sense of the complex paths your donors and advocates take to become ambassadors for your cause.

Build Client Trust and Elevate Impact with Marketing Automation for Nonprofits

Modern marketing automation applications can do a lot more than just finding and cultivating new donors, volunteers, or advocates. In fact, the same tools can be used by any nonprofit to improve how and when they deliver services or programs.

Really, marketing automation applications are digital relationship builders that allow you to engage with clients in more personalized and proactive ways. And they do so while minimizing the drain on your staff.

The key is understanding why these applications have become a game-changer for nonprofit organizations servicing those most in need or at risk.

Many Lower Income Families Are Connected, Just Not Enough

Let's start with the Pew Research Center report on digital connectedness in the United States, which shows that a digital divide exists. Middle- and upper-income families have more access in more ways to digital technology than lower-income families.

While there is still much to do to bridge the digital divide, broadband adoption and smartphone ownership have grown rapidly for all Americans – including those less well-off. In fact, Pew found that over 76 percent of households with incomes of less than $30,000 per year say they have a smartphone. This represents dramatic growth over the past decade, driven in part by state and Federal programs.

This increased digital access has opened the door for engaging with customers and clients in impactful new ways. Some industries have taken the lead in seizing these opportunities, including healthcare, financial services, and online retailers. In a very general sense, marketing automation capabilities are part of what has enabled these industries to accelerate forward.

The good news is that there are now a number of affordable and easy-to-use marketing automation applications. Even smaller nonprofits can bring their client engagement into a new age. The results are better client experiences, increased impact, and a more productive team.

Using Marketing Tools for Client Engagement and Case Management

Here's how you can use marketing automation tools to multiply your impact.

Segmenting Your Audience

You can divide your clients and case files into segments based on relevant criteria. For example, you might have segments for different program types, client demographics, locations, or case statuses.

This way, you can send targeted messages and automate specific processes for each group, making sure they know about the resources or services they are eligible to receive.

And remember, with marketing automation, segmentation can be much more dynamic and responsive. When the client takes action, shows interest, or a program's eligibility changes, marketing automation can adjust which segments the client falls into.

Automating Communication

Use marketing automation to send personalized messages and updates to clients. This can include appointment reminders, progress reports, and event notifications. Personalization and timing are key to being as helpful as possible.

If a vulnerable family is facing food insecurity, an automated text message could remind them of meal site pickup days or alert them to a new state program.

Collecting and Managing Data

Forms and surveys can collect information from clients and program participants. For example, if you work in the health field, you could send clients an intake form to complete before their visit. This data would then be automatically stored in your marketing automation system or CRM so it can be integrated with your case management software.

This helps streamline data entry and keeps client records up-to-date.

You can use the reporting features to monitor program outcomes, client engagement, and the effectiveness of your communication efforts. Customized reports can measure the specific metrics that matter most to your organization.

Explore and Experiment With Your Tools (With the Right Mindset)

You will get the most out of your tools if you're willing to experiment and learn. But at the same time, you can't abandon your principles or be careless with your data.

With that in mind, here are a few reminders:

- **Be sure your tech stack communicates smoothly.** Ensure that your marketing automation application can integrate seamlessly with your case management software and any other tools you use. You need information to be shared between tools so nothing gets lost in the shuffle.
- **Data security should always be a priority.** Any automation process you put into place needs to comply with relevant data protection regulations, such as GDPR or HIPAA.
- **Build a 'sharing culture' on your team.** Encourage your team members to tell each other how they're using the tools. You can have lunch-and-learns or other meetings to share the new features you explore.
- **Remember the stakes.** The right tools can multiply your efforts so you can do even more good. But risky practices can do the opposite.

Improving the Way You Communicate

Your automation tools are likely way more robust than you're aware of. And, in the age of AI, these tools are getting smarter and more dynamic all the time.

Think creatively about how these tools can streamline case management and improve communication at every stage of a client's experience.

5 Steps to Selecting a Marketing Automation Application for Your Nonprofit

So far, we've set the stage: Marketing automation applications offer amazing capabilities for your nonprofit, from fundraising and volunteer engagement, to supporting grassroots advocacy efforts and client case management. They allow you to streamline your outreach and keep your audience engaged — all while limiting the demands on your staff.

But if you're shopping for software for the first time, you're likely to feel overwhelmed by dozens of options, all of which seem nearly identical.

While there is a good deal of overlap, different applications are better suited to specific situations. Use the guidelines below to help you select the right marketing automation application for your needs and be sure to check out our key feature guide in the Appendix.

Choosing the tool you need

Your marketing automation application will be your tool to reach the masses, so choosing the right one is important. That said, there are many amazing options, and you'll likely find yourself overwhelmed by too many choices instead of too few.

Remember that marketing automation tools are SaaS products (or software as a subscription). This is important for two main reasons:

1. This is not a one-time purchase, but a monthly investment you will likely be making in perpetuity.
2. These applications are always adding features and improving based on user feedback. If there's some limitation you experience, there's a good chance it will be addressed in the future.

With that in mind, let's look at some criteria you can use to find the best tool for you and your nonprofit.

1. Decide what you want your application to do — both now and in the future

The most important determination you can make is deciding what you actually want the tool to do. If you're just looking for simple newsletter sends and database management, you might need one thing. If you want a full CRM with lead scoring capabilities, complex workflow capabilities, and sales tools, you might need something else.

Connected to this is understanding the scope of your needs.

- **Essential functions:** Figure out what the tool can actually do for you, with special attention to the features that get unlocked at each pay tier. Determine what functions are essential and what are nice-to-haves.
- **Data capabilities:** Learn what metrics the tool can track, along with reporting functionality.
- **Customer support:** Will you have a dedicated support person, or are you supposed to troubleshoot on your own?
- **Tech integrations:** See how the application integrates with other tools you use. (More on this below.)
- **Evolving capabilities:** Most automation applications roll out new features at a pretty regular clip. Ask your sales rep how often this happens and how clients are supported when experimenting with new features.

With a good idea of what you need, your next steps start to take shape. Next on your list should be budget.

2. Determine your budget

This seems obvious, but there are some nuances you might not expect.

First off, as mentioned above, remember this is a monthly subscription, so plan on an ongoing expense. There are also some other financial details to consider:

- **You can expect to sign a contract.** Your sales rep will want you to sign for as long a period as possible. The good news is that the longer the contract, the better the rate. The bad news is that you may get stuck with something you don't like.
- **Figure out who really needs to use the application.** In many cases, you'll get charged by the number of "seats" you need. These are full-fledged users who have access to all of the features. Do your homework and see what capabilities other users have. (For example, does a CFO need a full seat, or can she get the visibility she needs without one?)
- **Be on the lookout for hidden costs.** The sticker price might come with some add-on costs you're not anticipating at first. Find trusted resources online that give you the ins and outs of each tool's pricing structure. Chances are something will cost more than you think, whether it's the number of contacts in your database, SMS charges, or customer support.
- **Remember, it's always easy to upgrade…** but it's hard to downgrade. If you want to jump up to a higher tier, your sales rep will gladly accommodate you. Think you're overpaying and want to switch to a lower tier? You'll have to wait for your contract to expire. Keep that in mind when you make your selection.

The more you know upfront, the more likely you won't find yourself stuck in a costly contract.

3. Take a look at your whole tech stack

Automation applications want to offer you an end-to-end tool that can do all of your marketing (and, perhaps, sales and customer service, too).

If you're looking for a tool to only do one thing, make sure it plays nicely with the rest of your tech stack.

If you have to manually transfer data or continually clone information from one system to another, you're setting yourself up for a tedious time-suck and a chance for human error.

If you really like MailChimp for your email outreach, but you use Capterra for database management, you better be sure these two applications are easy to sync.

4. Evaluate your team's capabilities

As often as not, nonprofits overbuy when it comes to their marketing application. A sales rep gives a great demo and paints a rosy picture of efficiency and automation — and the team signs their contract.

A few months later they realize (if they ever realize at all), that they're not using all of the features they're paying for.

Maybe they don't need everything they thought they did — or maybe the team wasn't up to the task of full adoption.

When choosing a software, you can't just evaluate your needs and the tool's functions. You need to evaluate your team's capacity, too.

Are you looking for a totally intuitive, out-of-the-box solution? Or does your team have the capacity and willingness to self-educate on a more robust application?

Are there tech-savvy champions within your organization who can pilot new parts of the tool and then share what they find? Or is your team more likely to stick to what it knows?

Be honest. Don't sign your team up for the wrong thing.

At the same time, know that there are trainers and coaches who can help you get more from whatever software you've chosen.

5. Talk to others in your space

Honestly, this could come first. You could talk to colleagues and others in your network to see what tools they love. Or it could come last, as a final "reference check" before you sign a contract. But don't skip this step.

Personal recommendations matter. Word-of-mouth will be the most trusted endorsement (or the most damning critique) you can get.

If someone loves a tool, ask why. Ask for details. If you're close enough, ask that friend for a quick demo or walkthrough. You'll often find that it's more helpful than the blazing demo offered by a sales rep.

The tool your future self will thank you for

No marketing automation tool is perfect, but the right tool will delight you with how much it improves your day-to-day. There are many good options on the market, so, again, you're likely to be overwhelmed by choices rather than frustrated by finding nothing.

When in doubt, talk to your network. See what organizations of similar size use. How do they reach their audiences?

If you do your homework and don't allow yourself to get persuaded by the first sales pitch you hear, you'll be able to find what you're looking for.

Need help choosing the right marketing automation tool for your nonprofit? We're happy to help. Contact us today!

Top Marketing Automation Applications for Nonprofits

Picking the right application for you begins when you understand your needs, platform capabilities, and costs. Below, we'll run through some top options you might consider.

You can use the information below as a primer to guide your choice.

Before we dive in, a few reminders:

1. **There is no *perfect* application.** Each has its pros and cons, each has its fans and haters.
2. **There are a number of *really good* applications.** Don't get consumed with a "the grass is always greener" mentality. There are probably ways to do what you're looking to do with the application you have.
3. **You need data to flow smoothly in and out of your CRM.** Your CRM is a vital place for housing all your marketing data, which is essential for getting a full picture for segmentation and targeting. The better your data, the better your relationship building.
4. **You will probably learn things the hard way.** Unexpected costs, inefficient processes – these will likely stymie your early work in your application. Learn what you can before you jump in and then be prepared to keep on learning. Speaking of which...
5. **There are robust support networks for each tool**, both online and in person. These are great resources to troubleshoot problems and build connections.
6. Lastly, and most importantly, **an automation application is not a marketing strategy**. These tools can do amazing things for your organization – but they are just tools. A hammer and a saw can't build a house on their own. You need a blueprint and a builder to put them to good use. Same thing here. (See Ch. 1)

Keep in mind, applications tend to charge you by the number of contacts in your database. For some organizations, the cost of their database is greater than the cost of the software itself. When you look into your options, do your research. Talk to people who use the tool and ask what they know about pricing that they didn't know when they signed up. This will give you the best idea of your long-term costs.

With that, let's look at some automation options for your nonprofit.

Mailchimp®

What it is: Mailchimp is a popular email marketing application with numerous automation features including email and SMS automation, AI-assisted composing, smart segmenting, and data analytics. It's user-friendly and quick to set up.

Mailchimp offers a 15% discount for nonprofits, which you can find out more about here.

Potential drawbacks: Some reviews on Trustpilot and other sites say that Mailchimp's customer service is lacking.

HubSpot®

What it is: Trusted by organizations like the Worldwide Wildlife Fund and the Food Bank for New York City, HubSpot offers premium automation and content management systems for nonprofits of all sizes. HubSpot offers numerous integrations with other programs, from Gmail and Facebook Ads to Zapier and Eventbrite. Hubspot offers a CRM while also providing robust integration with Salesforce.

HubSpot offers a 40% discount for nonprofits. You can find out about it here, but you'll have to talk to their sales team to have it applied.

Potential drawbacks: HubSpot pricing can be tricky to figure out, and many organizations find that the number of contacts in their database can become a hefty recurring charge.

ActiveCampaign®

What it is: ActiveCampaign is known for its powerful automation tools that can be highly customized and finely tuned for specific needs. For example, its Predictive Send capabilities use machine learning to time email sends based on past behavior. The ActiveCampaign Salesforce integration provides a two-way sync between your ActiveCampaign account and your Salesforce account.

ActiveCampaign offers a 20% discount for nonprofits.

Potential drawbacks: Some users complain of lagging functions and slow load times, as well as price hikes. In general, ActiveCampaign is pricier than some other options.

Marketo®

What it is: Marketo by Adobe, is a robust marketing automation application offering email automation, lead management, and analytics. It's a bit pricier than some of the other options, but that higher cost comes with more capabilities to serve more complex needs. Marketo offers four tiers: Growth, Select, Prime, and Ultimate.

The sync between Salesforce and Marketo is bidirectional only for leads, contacts, and Salesforce campaigns. In these cases, whenever you make changes in either Salesforce or Marketo, your updates will be reflected in both systems. All other syncs are from Salesforce to Marketo only.

Nonprofits can apply to use Marketo for free, but only a handful are selected.

Potential drawbacks: Marketo does not offer its own CRM, so you will have to integrate it with another application.

Salesforce Marketing Cloud®

What it is: Salesforce offers a comprehensive suite of marketing automation tools through its Marketing Cloud. Salesforce also is fast becoming the standard CRM for nonprofit organizations here in the United States and around the globe.

A significant benefit of the Salesforce Marketing Cloud is the integration with the Salesforce CRM where fundraising, programs, and volunteers are managed. This integration allows nonprofits to create more personalized, relationship-building communications.

The Salesforce applications have long utilized AI and machine learning to help teams scale their marketing efforts.

Salesforce offers Marketing Cloud Applications at a 50% discount for nonprofits. You can find out about it here. Salesforce relies on its networks of consulting firms like iMission to help nonprofits configure and deploy the marketing applications that best suit the needs of each unique nonprofit.

Potential drawbacks: Salesforce offers a range of marketing tools, so choosing the right applications can be an issue.

The applications listed above each have their strengths and weaknesses, but there is also a significant amount of overlap. Each will help you automate email sends, map your donor journey, track analytics, and much more.

In short, each could be the tool you're looking for. In such a marketplace, it's important to do your research and read reviews. Learn everything you can about pricing and features — and not just from the salesperson's demo.

Most importantly, remember: Software is a tool, not a strategy.

When you sign up for Marketo or ConstantContact you will not suddenly see the leads and donors just start pouring in.

But these tools are powerful. When properly deployed, they can turbocharge your efforts to build your audience, engage your prospects, and nurture your donors so they can become ambassadors for your organization.

Nonprofit Marketing: Integrating Your Automation Tools with Your CRM

Your CRM (or Customer Relationship Management tool) is the smart database at the heart of all your outreach efforts. It keeps records of all your contacts, which allows you to track each person's engagement over time.

To best connect with your audience, though, your CRM and your automation application have to work together.

Often, this happens seamlessly. Many automation applications are also CRMs (or vice versa), so smooth functioning is virtually guaranteed. But this isn't always the case.

As you plan marketing campaigns for your nonprofit (See Ch. 1), you'll need to be certain that information is flowing easily between both tools.

Let's look at how that happens.

Getting to know your tools

First off, we need to know the difference between these two tools to understand gaps and overlaps in what they do.

What is a CRM?

A CRM is a smart database that keeps track of all of your donors and contacts. The function of the CRM is to manage and maintain relationships with your audience.

Within your CRM you can see contact records that include all of the information you have about a given person. While there are obvious ones like name, address, and phone number, CRM data goes much deeper. You can see records of all communication (calls made, SMS messages sent, emails opened, etc.), as well as that person's activity on your website (pages viewed, forms filled out, etc.).

CRMs track a person's progress from conversion (the first time they fill out a form on your website) to donation — and onward.

How is this different from a marketing automation application?

Marketing automation tools help you automate marketing tasks, especially things like email campaigns, newsletters, and lead nurturing, so you can spread your message and keep your audience engaged.

In order to effectively automate your communication, you may need to segment your audience, grouping them by characteristics like location, age, past donor status, or more.

Marketing automation tools rely on data from your CRM to contact the right people at the right time with the right message.

Integrating your automation and CRM tools

To make sure your automation tools play nicely with your CRM, you should follow some basic steps and best practices.

1. **Articulate what you want to accomplish.** You can't really measure success without first determining what you're trying to achieve. Before you buy any expensive software, figure out what you're trying to do.
2. **Choose your tools wisely.** Many automation tools include CRMs, so you can be sure your experience will be seamless. Some don't. When you're choosing your tech stack, pay close attention to which tools work well together. Even if you're using two different tools, there's a good chance there's an API (Application Program Interface) that can connect them. Even this, though, can be fallible. Is the API built by the companies themselves, or is it from a third party? You need to trust every aspect of your data management.
3. **Assign an 'owner'.** If no one owns something, it's more likely to get neglected and slip through the cracks. So, who's responsible for making sure these systems run smoothly? Your head of marketing? Someone on your IT staff? Make sure it's someone internally — and make sure they have the bandwidth to do it. You don't want the owner to be some point of contact at an outside agency. Your data will essentially be held hostage if you're always having to make a call and write a check if something goes wrong.
4. **Conduct a data audit.** Look over the data you have today. Clean up what you can and note any gaps or duplications.
5. **Customize the integration settings.** Work within each application to be sure that data and information can move between them without impediment.
6. **Plan your workflows.** Every reminder email and newsletter that ends up in your personal inbox is the product of careful planning by marketing teams. If you want your organization to do the same, you need to plan. What should happen when someone downloads a resource, signs up for your newsletter, or makes a donation? Develop your strategy — then build the processes to bring it to life.
7. **Gather data, tweak, repeat.** As your systems get up and running, keep learning, adjusting, and improving.

Long-term marketing automation success

By nature, marketing is a long game. It's unlikely that a single email or a single social media post will turn some unaware browser into your next big donor. Trust is built over time, and donations come by way of many touchpoints.

To build a marketing engine that delivers steady results for years to come, build the habits that will create that success.

Invest in team training

If you want to grow your organization, you need to grow your people. Offer trainings and encourage experimentation. Reward the certifications and coursework your employees complete. The tools you're using are always getting updated and improved. If your team doesn't improve at the same rate, you'll start backsliding.

Practice good data hygiene

Conventional marketing wisdom says that any database decays by about 10% per year. People move, they switch jobs and their work email addresses get shut down, they change their phone numbers. On top of that, typos and duplicate content can wreak havoc on your marketing.

CRM tools can help you sort through your list and clean it up, as can third-party tools like Neverbounce and Kickbox.

But you'll have to do something about your new data, too. Be clear about naming conventions, and be consistent about properties. Keep that list clean and you'll get better results.

Don't think you can 'set it and forget it'

We all want to just let the tools do their magic, but that mindset is hazardous. Just running the same playbook month after month will likely produce ever-diminishing returns. Instead, be sure to experiment. Track metrics along the way so you can see what's effective and what's not.

Document your processes

If it's not written down, it doesn't exist. However you handle project management, make sure there's a record somewhere of how things get done, who handles what, and what the results have been.

Building your marketing success

With your CRM and automation application in full sync, you can spread your message, grow your audience, and engage your contacts better than ever before.

But don't just jump in. This is a situation that calls for careful planning so you don't find yourself cleaning up today's messes in six months.

Do the work to be sure that the tools are working together as they should. And remember, while marketing is a long game, your approach can't be static. Commit to learning and experimentation so that the results you're getting today are nothing compared to where you'll be a year from now.

APPENDIX: Marketing Automation for Nonprofits Key Feature Guide

There are hundreds of marketing automation applications for you and your nonprofit to choose between, ranging from well-known, jack-of-all-trades solutions to hyper-niche tools aimed at a very specific market.

Considering that each has several pricing tiers and unique add-ons, you're suddenly faced with even more choices.

The challenge you'll find is deciding between a whole bunch of options that all look pretty similar from the outside.

Each application will have its pros and cons. Each will have its die-hard fans and its inconsolable haters.

And, just to lay all the cards on the table: **there is no perfect application**. Whichever you choose, there will be things you like about it and things you don't. But in order to maximize those likes and minimize those dislikes, you can use this guide to set you on the right path.

The First Step: Determine Your Needs

You can divide automation applications into two categories: the basic and the super.

- Basic applications like Mailchimp are great for automated email sends like nurture campaigns triggered by certain actions. These keep your audience engaged and in the loop.
- Super-powered applications like Salesforce Marketing Cloud and HubSpot offer the same abilities and a whole lot more: lead scoring, journey mapping, website tracking, and powerful data analysis.

Now, there are more robust versions of Mailchimp and less powerful versions of HubSpot, for example, but this divide is a good way to start your thinking.

So, before you start thinking about features, focus on the needs of your organization, both today and in the future.

Your Marketing Automation Feature Checklist

When selecting the marketing automation application that's right for your nonprofit, you'll want to understand the options. This list of features will help you compare and contrast what tools are available.

Note: *Individual applications might use slightly different terminology, but what's below are standard definitions accepted in the industry.*

Marketing Automation Basics

- ☐ **Email Marketing Automation:** Create and automate email campaigns, including nurture campaigns, newsletters, and personalized emails.
- ☐ **Personalization:** Deliver personalized content and recommendations to individual contacts based on their preferences and behavior.
- ☐ **Lead Generation and Capture:** Capture leads through forms on your website and landing pages, and segment them based on behavior and demographics.
- ☐ **Multi-Channel Marketing:** Automate marketing activities across multiple channels, including email, social media, events, and SMS.
- ☐ **A/B Testing:** Conduct split tests to optimize email subject lines, content, and landing pages for improved conversion rates.

Advanced Marketing Tasks

- ☐ **Workflow Automation:** Create and customize automated workflows for various marketing tasks.
- ☐ **List Segmentation:** Divide your contact list into segments based on criteria such as behavior, location, interests, or engagement level for targeted marketing.
- ☐ **Dynamic Content:** Display different content to different segments of your audience based on their preferences and behavior.
- ☐ **Drip Marketing Campaigns:** Set up automated drip campaigns to deliver a series of emails or messages to leads at specific intervals. Create automated workflows that nurture leads over time with relevant content and offers.
- ☐ **Landing Page Builder:** Create and optimize landing pages for lead generation and conversion.

Marketing Insights

- ▢ **Lead Scoring:** Assign scores to leads based on their interactions with your content and website, helping prioritize high-value leads.
- ▢ **Analytics and Reporting:** Track and measure the performance of marketing campaigns with detailed analytics and reporting, including click-through rates, conversion rates, and ROI.
- ▢ **Campaign Tracking:** Monitor the effectiveness of marketing campaigns in real time and make adjustments as needed.
- ▢ **Lead Attribution:** Determine which marketing channels and campaigns are driving conversions and revenue.
- ▢ **Website Tracking:** Monitor visitor behavior on your website and use this data to personalize marketing efforts.

Integrations with Other Tools and Platforms

- ▢ **Social Media Automation:** Schedule and publish social media posts, engage with followers, and analyze social media performance.
- ▢ **Integration with Third-Party Tools:** Easily integrate with other marketing and sales tools, such as analytics platforms, event software, and client support platforms.
- ▢ **Lead Import and Export:** Easily import and export lead data to and from the platform.

Future-Proofing Your Organization

- ▢ **Compliance and Security:** Ensure compliance with data protection regulations and offer security features to protect customer data.
- ▢ **AI and Machine Learning:** Utilize AI and machine learning algorithms to optimize marketing efforts, such as predictive lead scoring and content recommendations.
- ▢ **Scalability:** Ability to scale the application to meet the needs of growing businesses.

The Right Tool for You

With hundreds of tools promising to streamline, modernize, and supercharge your processes, it can be hard to know which one to pick.

As you start your research, don't be afraid to talk to colleagues about the tools they use. A ringing endorsement from a friend is often more useful than a thousand online reviews. However, reviews have their value. Sites like Trustpilot and G2 aggregate user reviews so you can know what others think.

In the end, you know your team best. Be wary of salespeople who will try and upsell you features you don't need. Remember, you can always move up to a higher tier — but it's much harder to move down. Many tools have free trials (or entirely free versions) that you can play around with.

Once you make your choice, however, you may find it hard to switch. Your application will become so integrated into your work that jumping to another will become difficult.

So do your homework, talk to people you trust, and find the application that lets you do the most good.

About iMission

iMission is a social sector marketing agency and a nonprofit technology consulting firm. We offer marketing and technology strategy consulting as well as campaign and technology implementation services. Our clients include nonprofit organizations, health and human service providers, schools, municipalities, and social enterprises.

Contact us to learn more about how we can assist your organization today!

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