

Online Donor Acquisition and Retention Course

Beginner Donor Acquisition Module 1a-c

Introduction to Donor Acquisition

- What happens when someone shows up at your website?

Key Performance Indicators:

- What are they and how do you track and report on them?
- Leads vs. Donations
- The importance of your reporting system
- Basic metrics to track

Website Design for Donor Acquisition

- The most important element of your website: your homepage
- How to optimize your homepage to pass the 3 Second, 30 Second and 3 Minute Rule to convert your visitors into donors (or at least leads)
- Consider the weighting of messaging on your homepage
- Things to keep in mind when designing your sign-up and donation form(s)
- How many clicks to success?

What happens after you've converted a visitor into a lead or donor?

- Using email to retain a new donor or convert a lead to a new donor
- Your communications strategy and Thank You campaign
- Donor Activation Strategy

Tools to Help You Succeed

Intermediate Donor Acquisition Module 1d-f

Key Performance Indicators for Media Campaigns

- Setting and tracking your success metrics

Landing Page Development for Media Campaigns

- How to tailor your pages to a new donor experience

The Importance of a Mobile Enabled Website

Organic Search

- What is it? What are the benefits?
- How Google decides the ranking of Organic Search results
- How to implement keywords and tags

Search Engine Optimization (SEO)

- What is it?

<ul style="list-style-type: none"> • How to get better rankings 	
Media Campaigns <ul style="list-style-type: none"> • 'Self-serve' solutions that you can manage yourself 	
Paid Search Marketing <ul style="list-style-type: none"> • Importance of and how to implement key words and tags 	
Re-Marketing <ul style="list-style-type: none"> • What is it? How does it work? 	
Google Display Network <ul style="list-style-type: none"> • What is it? How can it benefit your charity? 	
Social Media Campaigns <ul style="list-style-type: none"> • Targeting ads on social media • Setting up a social media campaign 	
<h2>Beginner Donor Retention Module 2 a-b</h2>	
Introduction to Donor Retention <ul style="list-style-type: none"> • Why is donor retention declining? 	
Donor Retention Strategy <ul style="list-style-type: none"> • Keeping donors engaged • Lifetime Value (LTV) 	
Planning Effective Email Campaigns <ul style="list-style-type: none"> • How to establish a deployment schedule • Importance of and how to synchronize email campaigns with offline direct marketing programs 	
Keep Your Supporters Engaged <ul style="list-style-type: none"> • What are transactional emails? Why are they important? • Show gratitude to first time donors • The next steps once a relationship has been established 	
Email Content <ul style="list-style-type: none"> • Importance of a Subject Line and From Field 	
Five Emails All Non-Profits Should Send <ul style="list-style-type: none"> • Welcome email • Fundraising events • Thank You • High Value Constituents • Internal Communications 	
Emails for Donor Retention – Welcome Series <ul style="list-style-type: none"> • Thanks – personalized 	

- Impact – your organization’s impact in the world
- Deep Dive – explain more about your organization
- Beyond Donations – explain how donors can get involved in other ways
- Value-added Content – share stories or research you have published, encourage them to connect with you on social media
- Community – share user-generated content
- Ask – ask for a second gift after establishing a relationship

Intermediate Donor Retention Module 2 c-d

Donor Retention Strategy

- Regularity of email campaigns
- How to test email marketing and the most important variables to look for

Email Metrics

- What they are and how to use them
- Basic metrics commonly measured

Email Service Providers

- How to select one
- Pricing

Email Service Providers – Benefits

- List management
- Deliverability
- Formatting and design
- Tracking
- Segmented lists and personalization features

Segmentation, Personalization, and Data Collection

- Segment your database for personalized communications
- Examples for personalizing your email communications
- Building constituent profiles
- How to increase response rates
- Importance of and how to collect profile information
- Targeting segmented audiences
- How to automatically customize email content

Beginner Google Analytics Module 3 a-b

Introduction to Google Analytics

- What is Web Analytics?
- What is Online Marketing Analytics?
- Why Google Analytics and not one of its competitors?

Basic Web Metric Definitions

- Visit/Session
- Unique Visitor
- Pageview (sometimes called an Impression)
- Hits
- Bounce Rate

Getting Started with Google Analytics

- How to set up your account
- Getting the most out of your beginner's experience with web analytics

Basic Level Key Performance Indicators to Track

- Website traffic
- New donors
- Repeat donors
- Totals of new and repeat donors

Google Reports and Dashboards

- View basic Key Performance Indicators by using built-in reports from Google Analytics
- How to navigate Google Analytics in a step-by-step breakdown
- Track the success of campaign URLs
- How to create custom dashboards and reports
- How to track donations to your website through E-Commerce section of Google Analytics

Additional Resources and Tools

Intermediate Google Analytics Module 3 c-e

Intermediate Key Performance Indicators

Goals in Google Analytics

- How to create a goal
- Using Funnels

Google Analytics: Advanced Segments

- How to isolate and analyze subsets of traffic that share the same characteristics

<ul style="list-style-type: none"> • How to access Advanced Segments in Google Analytics and how to create your own • Creating a Custom Advanced Segment 	
<p>Google Analytics: Customization</p> <ul style="list-style-type: none"> • Viable option when you cannot receive all of the information you need from a standard report on Google Analytics • Three ways to create a custom report and how to navigate Google Analytics • Create a Report from Scratch • Customize an Existing Report • Import from the Solutions Gallery 	
<p>Google Analytics: Putting it all Together</p> <ul style="list-style-type: none"> • Acquisition Reports from Beginner Google Analytics can be integrated with Goals, Segments and Customization to help find the most successful channels for donor acquisition • Built-in “All Traffic” report 	
<p>Optimizing</p> <ul style="list-style-type: none"> • How to optimize the success of the data you tracked and reported on from earlier modules • How to set realistic goals for your organization • Examples of how to increase online donations made through your website • Questions to consider • Helpful tips to ensure your webpages are designed for optimal success 	
<p>Next Steps</p> <ul style="list-style-type: none"> • Goals to set for yourself 	
<h2>Beginner Social Media Module 4 a-e</h2>	
<p>Introduction to Social Media</p> <ul style="list-style-type: none"> • How can social media help with donor acquisition and retention? • Why is social media so important? 	
<p>How Social Media Can Benefit Your Charity</p> <ul style="list-style-type: none"> • Engage and connect • Drive traffic to your site • Promote specific programs • Acquisition 	

<ul style="list-style-type: none"> • Be relevant 	
<p>Social Media’s Place Within the Donor Funnel</p> <ul style="list-style-type: none"> • Prospecting • Cultivation • Asking • Stewardship 	
<p>The Importance of a Story</p> <ul style="list-style-type: none"> • How to make storytelling more effective • Examples 	
<p>Tagging</p> <ul style="list-style-type: none"> • What is it? Why is it important? • Finding hashtags to join • When and how to tag • Tips for creating your own tag (and starting your own conversation) • Joining hashtags 	
<p>#GivingTuesdayCA</p>	
<p>Popular Social Networks</p> <ul style="list-style-type: none"> • Brief overview of: Facebook, Twitter, Instagram, Pinterest, LinkedIn, YouTube • How they can benefit your organization • How blogs can help with donor acquisition and retention 	
<p>CanadaHelps Giving Life Blog: Editorial Contributors & Roles</p> <ul style="list-style-type: none"> • Editorial roadmap of who creates the blog and the blog’s content • Example of how CanadaHelps shares our Giving Life blog on social media 	
<p>Popular Social Networks</p> <ul style="list-style-type: none"> • Which social network should you use? Which will be most beneficial to your organization? 	
<p>Best Practices for Getting Started</p> <ul style="list-style-type: none"> • Social media thrives on storytelling and conversation • Timeliness is an important consideration • Keep your accounts active and reactive • Different social media platforms have different character limits, but in all cases, an economy of language is a must • Increasing your follower count is easiest when you post on a consistent schedule • All of your posts should be objective driven 	
<p>Social Media Tips</p>	

<ul style="list-style-type: none"> • How to optimize your follower engagement on Facebook, Twitter, Instagram, Pinterest, LinkedIn • Tips for effective posting (how, when, what to post) 	
<p>Social Media Tips for Growing Followers</p> <ul style="list-style-type: none"> • Tips for promoting your social media presence • When to include a <i>follow us</i> or <i>share/like</i> call-to-action • When to ask your donors/supporters to follow you on all of your social media accounts and/or share your story • Follow others that share in your mission 	
<p>Planning and Management</p> <ul style="list-style-type: none"> • How to create a content calendar and get your team involved • Content approval and troubleshooting 	
<p>Social Media Strategy</p> <ul style="list-style-type: none"> • Checklist of guidelines for developing your social media strategy 	
<h2>Intermediate Social Media Module 4 f-g</h2>	
<p>Measuring Success</p> <ul style="list-style-type: none"> • Using analytics to measure success • Judge social media success by using social media analytics • Overall performance: fan/follower count, engagement, demographic insights, click-through-rates, conversion, reach, negative feedback 	
<p>Social Media Analytics</p> <ul style="list-style-type: none"> • Native tools vs. third party tools 	
<p>Targeting Your Audience</p> <ul style="list-style-type: none"> • How to target posts to a specific audience based on the social networking site • Example of how to use Facebook to target your campaign to a segmented audience • How to limit or target your audience 	
<p>Advertising on Social Media</p> <ul style="list-style-type: none"> • How to grow your online presence and promote your campaigns using social media advertising • How to set up advertising on specific social media sites and how to “boost” or promote them • Ideas for targeting your ads to particular individuals • Links for further reference 	
<p>Campaign Examples</p>	

<ul style="list-style-type: none"> • Big Idea Campaigns – Ice Bucket Challenge • #GivingTuesdayCA • Tips to make your campaign successful 	
<p>Social Media Tools</p> <ul style="list-style-type: none"> • Links for further reference re: hashtags, Twitter accounts to follow, high performing content, management and analytics 	
<p>Additional Resources and Tools</p>	