salsa®

10 WAYS

TO GET YOUR SUPPORTERS TO TAKE THE NEXT STEP

Increase awareness and inspire involvement with the Engagement Workbook

Getting Your Supporters to Take the Next Step

This engagement workbook provides you with the steps to accomplish short-term goals and achieve long-term success as you guide your new supporters along the path of engagement.

When you kick off a fundraising appeal, start an advocacy campaign, or host an event, you do it with a certain goal in mind. You want supporters to donate, sign a petition, become a volunteer, or any combination of these. But what happens next?

This is a question that often goes unasked by organizers of some of the most successful nonprofit campaigns.

Remember the "Ice Bucket Challenge," the social fundraising phenomenon that raised over $100 million for the ALS Association in 2014? While the success of the success was unprecedented, its organizers missed a vital opportunity to foster long-term relationships with new donors due to a lack of follow-up.

That moment after a supporter has taken an action is a hugely important one; after all, you have the unique advantage of their undivided attention. But how can you use the momentum gained to get these newly engaged users to take action again?

This workbook provides a step-by-step guide to moving your supporters along a path of engagement through a series of pre-planned, guaranteed-to-succeed, post-action tasks!

Understand Why You Need to Keep Moving your Supporters Along

Everyone comes to your organization at different points of awareness and action. Perhaps they joined your walk-a-thon because a co-worker was walking too, or maybe they liked your Facebook page and have shared a few of your posts.

Regardless of how they discover your organization, it's all about moving them through a consistent, repeatable engagement cycle and advancing supporters through the value chain. Here's what that looks like:

Target – Build rich supporter profiles and target with easy to use segmentation and grouping techniques based on demographics, giving level, location, etc. Apply different strategies for supporters based on their interests, preferred methods of contact and personal profiles. The more you know your supporters, the more personalized and relevant your interactions.

Connect – Once you have identified the right people to target, it's critical to connect with them via the most effective channels. Cut through the noise and clutter with precisely relevant messaging. Reach your donors where they are via email, social, mobile, direct mail, telephone or in-person.

Convert – After targeting and connecting with your donors, it's time to make the ask. Deliver a compelling case for support and a bold call to action. Make it easy for your donors to give with online donation forms, online event registration, rapid auction checkout and bulk check entry.

Optimize – Rich analytics and reporting help you continuously improve at each step of the fundraising process. A/B testing, dashboard insights, and embedded best practices help you optimize your outcomes while queries provide you detailed data for longterm strategic planning.

Become Goal Oriented

To help move your supporters along a path of engagement, it helps if you know what you want them to accomplish. Take some time to think about your organization's goals.

Check off which one of the following applies to your current goals:

- ☐ Increase issue and brand awareness

- ☐ Grow our email list

- ☐ Raise money

- ☐ Increase event attendance

- ☐ Recruit volunteers

- ☐ Change laws

- ☐ What else? Add yours here...

- ☐

- ☐

TASK 3:

Start Thinking of Goals in Terms of Actions

To help you accomplish the goals above, we've put together some suggested supporter actions that can help you achieve your goals. For example, if you want to grow your email list, you could look for ways to add email capture devices (such as a newsletter sign-up form) across your online assets.

Take a look at the worksheet below and add additional actions that you think might be a good fit you're your organization and supporter base.

Goal: Increase issue & brand awareness

Supporter Actions

- Visit your website
- Read and subscribe to your blog
- Share posts on social media

- Add your ideas here:
-
-

Goal: Grow your email list

Supporter Actions

- Subscribe to your newsletter
- Sign a pledge or petition
- Sign up for emails at your offline events and via your direct mail appeals
- Sign up for email via "forward to a friend" email links

- Add your ideas here:
-
-
-
-

Goal: Increase event attendance

Supporter Actions

- Register for the event
- Invite their network to events

- Add your ideas here:
-
-

Goal: Recruit volunteers

Supporter Actions

- Understand the need and value of volunteering
- Understand volunteer opportunities available
- Sign up

- Add your ideas here:
-
-
-

Goal: Change laws or policies

Supporter Actions

- Sign a petition
- Encourage their network sign
- Social sharing
- Contact the target of the petition
- Contact the media

- Add your ideas here:
-
-
-
-

If your goal isn't listed here, take a moment to create your own outline of suggested user actions that match your desired outcomes.

As you complete this task, think about your goal as well as your supporters' goals, big and little. Use surveys and social media to poll your supporters on what brings them to your site or what they hope to achieve in giving you their support.

TASK 4:
Look for Connections

Now that you have a sense of your goals and potential actions that can help you accomplish them, it's time to start connecting the dots.
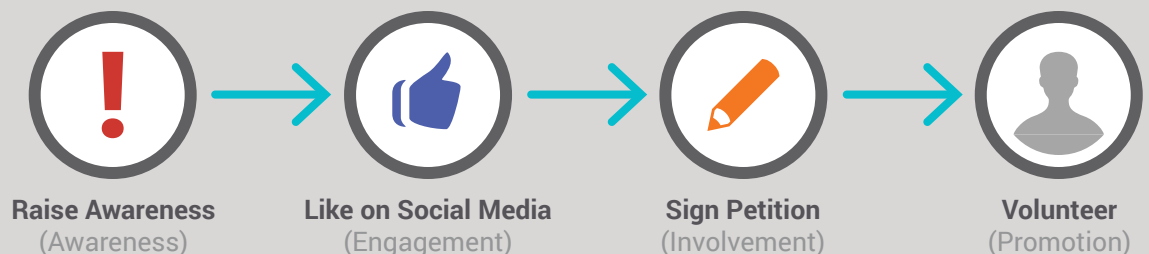
What you'll start to notice, if you haven't already, is that your goals actually connect. For instance, if you're looking to increase brand awareness, your follow-on goal would be to encourage those newly "aware" supporters to move along the path to "engagement", perhaps by subscribing to your email list (another goal). Next, you may want to move that supporter to the next step and ask them to donate or attend an event and become "involved". You get the picture!

Think about the ways that your goals interconnect. Consider a selection of different scenarios that depict the multiple paths that you want your supporters to take. As you do this, think about some of the ways that you could encourage supporters to take the next step. These could come from the bulleted list of actions that you created earlier, but here are just a few scenarios that we came up with:

Scenario 1:
Raise Money

Raise Awareness (Awareness) → **Subscribe** (Engagement) → **Donate** (Involvement)

Scenario 2:
Recruit Volunteers

Raise Awareness (Awareness) → **Like on Social Media** (Engagement) → **Sign Petition** (Involvement) → **Volunteer** (Promotion)

Use All Available Real Estate to Make your Ask

As you compile your list of online actions, think about where these action types will take place and how you can use them to optimize moving your supporters along the path of engagement. It's actually easier than you think, because you can use the same online content – thank you pages, auto-responder emails, Facebook posts, sidebar promos – over and over again to move users from one action to the next, keeping the momentum going and developing deeper relationships with supporters along the way.

Here are a few examples of how you can use your actions:
- Add a link to a petition on your donation thank you page, so that users can move quickly to another action.
- Once a supporter has signed a petition, use an auto-responder email to encourage them to invite their friends to learn more about your cause.
- Add a list of upcoming events to the same landing page where they learn about why and how to become a volunteer.
- Use sidebars and overlays to promote your newsletter alongside inspiring content such as videos, articles, and blogs.

Use the form on the next page to map your action points.

Action	Related Action(s)
Example: Make a donation	• Add link to latest petition on donation thank you page
Example: Sign up for newsletter	• Add link to upcoming events on auto-responder email • Encourage them to subscribe to your blog or follow you on social media on confirmation page and welcome email
Add yours here...	
Add yours here...	

Tip: Don't just go with what you know. Take this opportunity to think about your current conversion points and think about what's missing. What are other nonprofits doing to inspire action? How are they using their online forms, landing pages, social sites, and auto-responders creatively?

Even if you're not ready to implement some snazzy new web features, keep a wish list and reference it when it's time to refresh or relaunch your website.

TASK 6:
Use your Goals to Inform your Call to Action

So now that you've identified where your calls to action are going to reside, spend some time ensuring they are clear and inspiring so that supporters will readily take the next step.

In order to come up with a compelling call to action, you need to stop and revisit your goals, whether it's fundraising, growing your base, or recruiting volunteers. It could be one or several combinations of these, but the key here is to focus.

Pick a scenario and work toward making incremental improvements. Perhaps you want to see more donors taking an advocacy action. Or maybe you want to see more of your new supporters donate sooner. Once you've set your goal, it will be easier to gauge what changes you need to make to your existing calls to action or website.

Prepare your Online Assets

Next, think about all the online assets or elements that you'll need to update to support your efforts and get your supporters to the next step, such as your thank you pages, auto-responder emails, etc.

What can you do with those elements to inspire action, and what action do you want to inspire? Updates to your content might include the addition of images to aid with visual storytelling or a success story that clearly shows how an action can make a difference.

When the time comes, you should also ensure that you only ask relevant people to take an action. For example, if a supporter responded to an email campaign that you sent out requesting donations, your thank you page or auto-responder doesn't need to ask them to join your email list, since of course, they are already on it. Think of something more pertinent instead, then make sure you're developing content for those campaigns, too. Speaking of which…
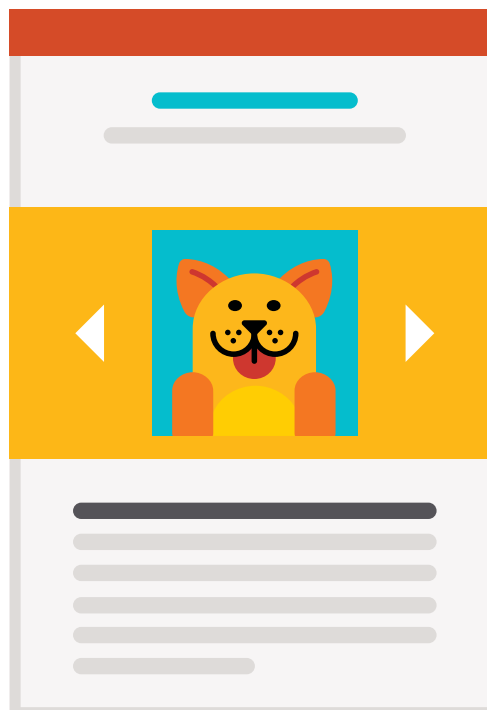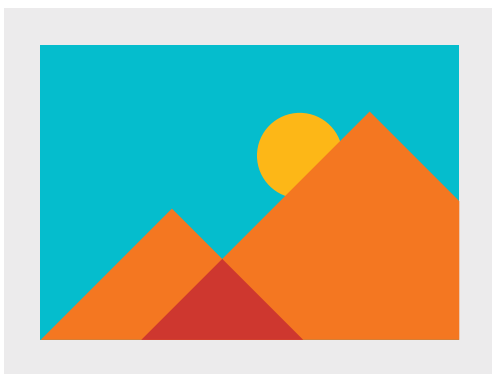
Make your Landing Page Rock

The design of your landing pages is critical to successfully engaging and converting users. Use clear page titles, descriptions, and form fields to make your pages as easy as possible to use. You should be able to collect the information you need from your supporters without overwhelming them with too many requests or too much information.

Using the same generic landing pages across many actions could be hurting your conversion rate, too.

Instead, create a form that's unique to a particular topic or campaign. A supporter reading a story about saving puppies will be more inspired to click through to make a donation after seeing a contextual promotion in the sidebar ("Help Save the Puppies") and will feel even more engaged knowing that part of their donation will go towards this specific cause.

Help Save the Puppies!

donate
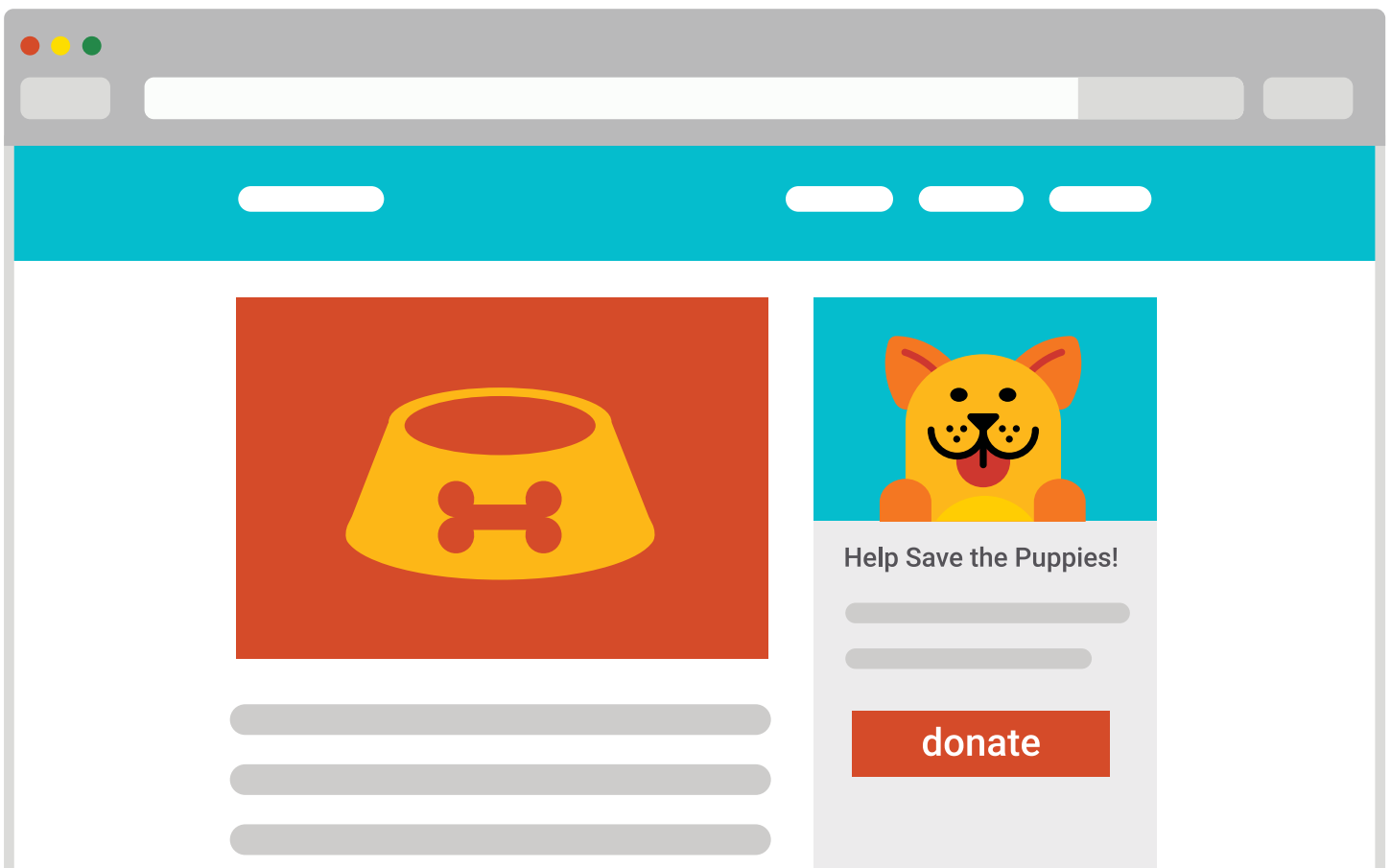
Test your Calls to Action

You may think your calls to action are great, but how sure are you? Don't just go with your gut, test them.

Third-party tools like Optimizely allow you to test everything from your submit button color to the location of your calls to action, and even the language you use to inspire action. Even a small improvement could lead to big results. With free, easy-to-use tools at your fingertips, there's no reason to guess about what will work for your supporters.

A.

Advocacy Organization

Donate

B.

Let's Do Our Part!

Support Us

Measuring Success

Once your changes have been implemented, wait a few days – even a week or two – then check on how your pages are performing with your audience. Are you seeing more petition signatures? Are you seeing more social shares? Are you seeing more inbound traffic from social networks? Can you trace this increase in engagement back to your updates?

But of course, more importantly… what's next?

Here's how one of the scenarios we worked through might play out...

User Engagement Scenario:
Our organization wants to increase awareness of policy issues, and increase the percent of donors who take an advocacy action.

Project Goals:
# of donors who sign a petition, social shares of petitions

Properties to Update:
Donation "Thank You" Page, Donation Auto-responder, and Petition Signature Confirmation Page.

Updates to Make:
Don't just confirm the user's donation on the "thank you" page, add a link or button promoting a relevant petition or other call to action. Make a similar update to the Donation auto-responder. Then, when a user signs a petition, use a confirmation page to thank them for making a difference. Include social share links with pre-populated copy. That copy should give context to the people who see the post once it's shared. Remember, those connections may not have never heard of the org before, so they'll need some background info!

About

Salsa is comprehensive fundraising, advocacy, and marketing software that helps social good organizations engage communities, raise funds, rally supporters, and change the world.

By unifying constituent relationship management and online engagement on one platform, Salsa empowers nonprofits to target and segment rich supporter profiles, connect online and offline with relevant messages, convert supporter interest into action with online forms, and optimize outreach with built-in best practices.

With access to these powerful tools plus award-winning customer support, nonprofits across the world are boosting staff efficiency, deepening supporter relationships, and accelerating fundraising growth.

Visit Salsa online at www.salsalabs.com.