

How to train your robot

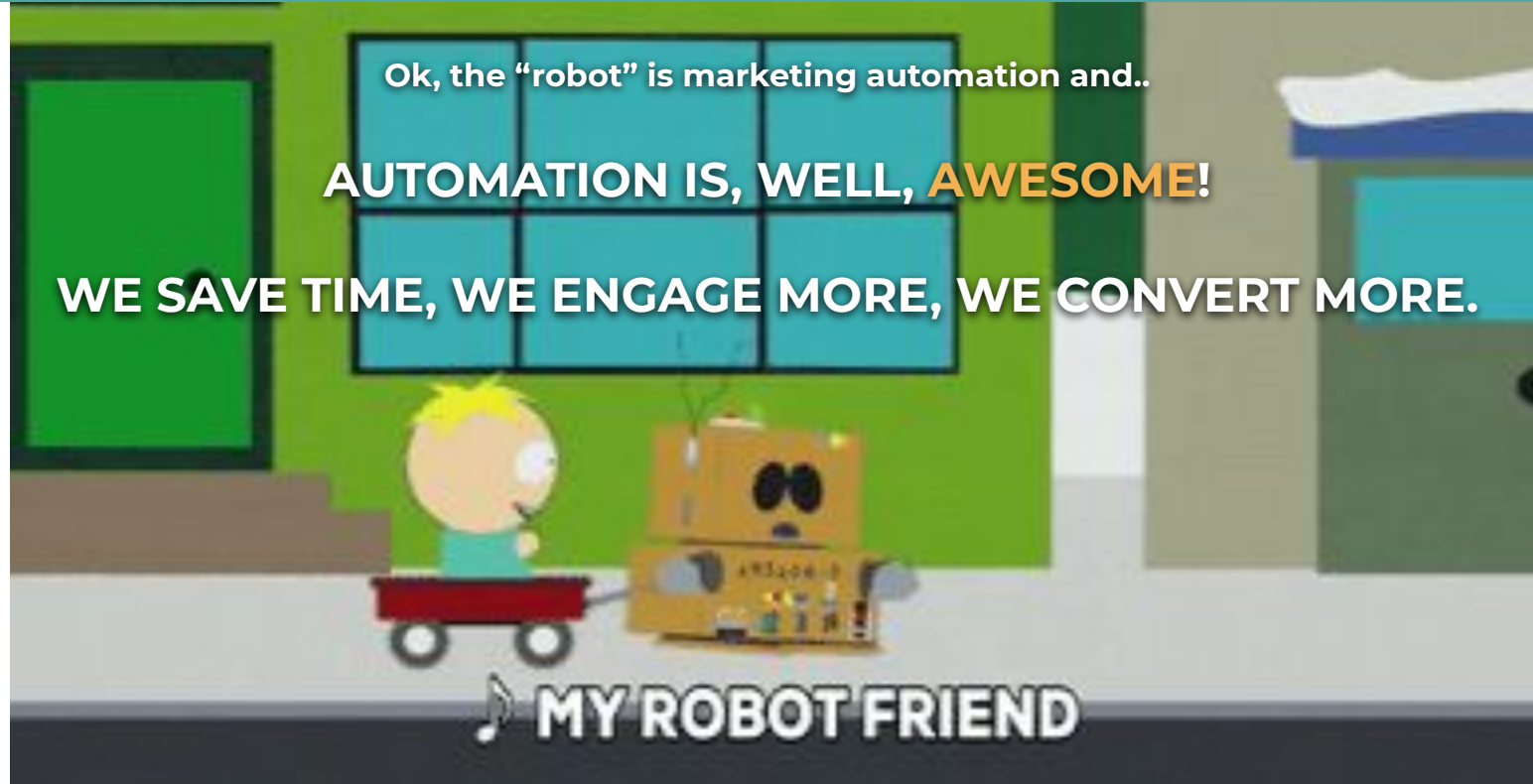
(to enhance engagement)

OCTOBER 10, 2019

Matt Barr
Director of Operations and Delivery
Yeeboo Digital



Wait, what are we talking about today?



Ok, the “robot” is marketing automation and..

AUTOMATION IS, WELL, AWESOME!

WE SAVE TIME, WE ENGAGE MORE, WE CONVERT MORE.

♪ **MY ROBOT FRIEND**

But first!

In pairs and in 30 seconds...

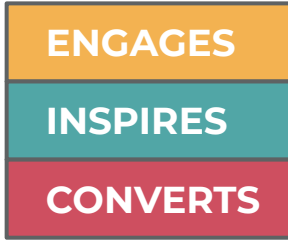
VERY SIMPLY - SEE IF YOU CAN GET YOUR NEIGHBOR'S EMAIL ADDRESS

Now, in the same pairs and in 2 minutes...

VERY SIMPLY - SEE IF YOU CAN GET YOUR NEIGHBOR TO GIVE YOU \$20

So, wait, what are we talking about today?

However, it's not the automation tool that



It's the **stories** to inspire and the **micro-actions** to engage created through **strategy**, thoughtful **planning**, and subsequent **testing**.

We're going to focus on the **strategy** for marketing automation today.



So, wait, what we are talking about today?

Different names for the same thing

Onboarding series

Welcome series

Engagement series

Nurturing series



FOR NEW **SUBSCRIBERS**, NEW **DONORS**, NEW **MONTHLY DONORS**, NEW **EVENT ATTENDEES**.

It's post-lunch nap time, so what can we dream about?



1. The bad news and Intros
2. (Why do I need email addresses?)
3. Why do we need to welcome and nurture?
 - o **3 BIG** reasons to nurture and engage
4. 2 recent case studies of different strategies for marketing automation currently seen in the wild
 - o With a robot-load of **tips** on what you can **test**

Who's Matt and what's a Yeeboo Digital?



Matt Barr

Director of Operations & Delivery

Spent the past 10 years learning, leading, and training the non-profit sector in the use of technology to drive revenue growth from the digital channel mix.

Career highlights:

- Created the strategy and test plans for over many a new nurturing email series.
- Planned and led complete technology overhaul for Heart and Stroke Foundation of Canada.
- Led, planned and trained the Greenpeace Mexico staff on mobile and email fundraising in their Mexico City HQ.

“WE FOSTER TECHNOLOGY-DRIVEN NONPROFIT GROWTH THROUGH CUSTOM PROJECTS, DIGITAL FUNDRAISING AND MANAGED SUPPORT SERVICES.”

WEBSITES & TECHNOLOGY

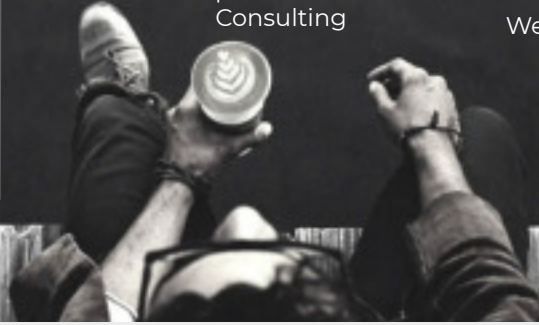
Wordpress Websites
Engaging Networks
Luminate Online / TeamRaiser
Tech Selection & Implementation Consulting

SUPPORT SERVICES

Fundraising Strategy
Email Design & Send
Engaging Networks Help
Luminate Online Support
Website Support

DIGITAL FUNDRAISING

New Donor Acquisition
Email Marketing
Digital Marketing
Google Adwords Grant



Do we even need email addresses?

Umm... yes, yes we do.

1. Email is the primary source of online revenue for the majority of non-profit organizations today.
2. And, multi-channel donors give more over time when you have their email address.

AND WHAT DO OUR FRIENDS **CCAH** HAVE TO SAY ON THIS?

- **Offline donors** have shown they can give up to **40% more** when you have their email address.
- **Retention increases by 29%** for offline donors when you have their email address.
- **Multi-channel (mail, online, phone) donors** can give up to **30% more** for your organization than offline-only donors.

Why do we need to welcome and nurture?

Traditionally, in the mail, we've acquired small gift donors by researching (hopefully) and asking with a package, hoping to convince and convert.

Over the phone and with face-to-face or street fundraising, we meet, we talk, we build a relationship (albeit briefly) and we ask.

Online, we need to first find relatively interested audiences and convince them to give for the first time. We need to get to know each other.

74% OF SUBSCRIBERS EXPECT A WELCOME MESSAGE

SOURCE: BLUEHORNET'S WELCOME EMAIL GUIDE

AND YOUR WELCOME MESSAGES WILL SEE 40%-80% OPEN RATES

3 Reasons to nurture and engage

#1 - To Educate and Inspire

#2 - To Increase Their Investment Time in You (and vice versa)

#3 - To Convince and Convert

3 Reasons to nurture and engage

#1 - To **Educate** and Inspire

Of course, we all know that **assumption** is...



THE MOTHER OF ALL SCREW-UPS

3 Reasons to nurture and engage

#1 - To **Educate** and Inspire

During email acquisition

With a petition or a pledge, your new audience connects on a **values-based** level.

Their **time investment** is minimal.

Their **understanding** is limited.



3 Reasons to nurture and engage

#1 - To **Educate** and Inspire

“Please sign on today if you agree that every child has the right to accessible, safe education.”

- who are you and why do you exist?
- what are you working to accomplish?
- what have you accomplished?

Charles understands this harsh reality all too well. Since the young age of 11, Charles has never lived in a time of peace.

In parts of Africa an AK-47 assault rifle costs as little as \$12. To a young person in a war zone like Charles, a gun can seem like the solution to all their problems. Violence is not a solution, but education can be.

Every child deserves a safe childhood, especially if they live in a war zone. But war-affected children who are not in school face threats and hardships not faced by those receiving an education. A lack of future income, the threat of abuse, and recruitment into armed groups are more likely when a child is not in school.

That is why education is so critical for children living in war-torn areas. And we need your support today to help bring children like Charles this opportunity.

Too many people turn a blind eye to the vulnerability of children living amongst violence. But if enough of us come together in support of education as the solution, then we stand a chance of lifting kids like Charles out of the desperate situations they face.

Please sign on today if you agree that every child has the right to accessible, safe education.

3 Reasons to nurture and engage

#2 - To **Increase** Their **Investment Time** in You (and vice versa)

| OFFER | TIME INVESTMENT | DONOR CONV. RATE |
|---------------|-----------------|------------------|
| Petition | 10 seconds | 0.33% |
| Quiz | 2 minutes | 2.73% |
| e-Book | 10 minutes | 3.11% |
| Online Course | 8 weeks | 5.97% |

SOURCE: [NEXTAFTER](#)

3 Reasons to nurture and engage

#2 - To **Increase** Their **Investment Time** in You (and vice versa)

With **micro-actions** to engage



3 Reasons to nurture and engage

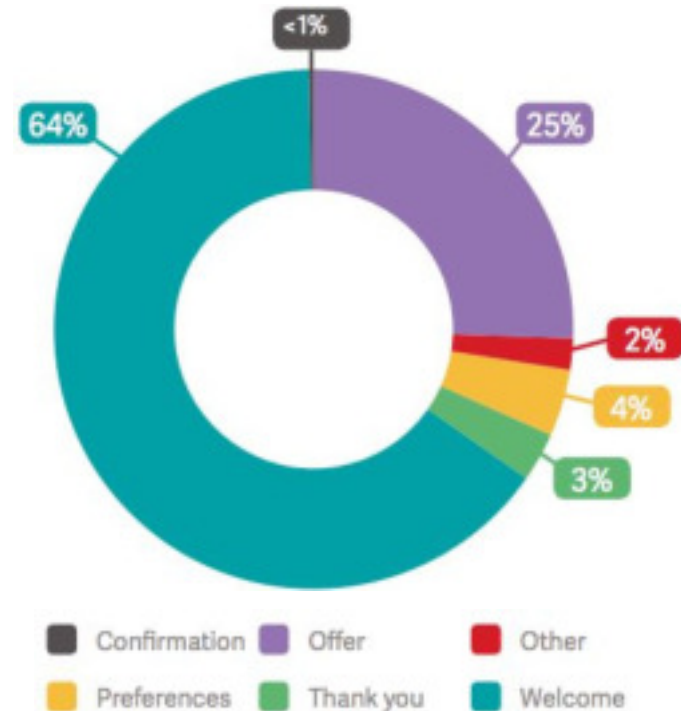
#3 - To **Convince** and **Convert**

We see welcome series receiving more than double the open rates as newsletters and appeals.

On average, welcome series emails receive a higher open rate than any other type of follow-up.

A recent study of 2 million subscribers from the top 100 retailers in the US showed 42% higher open rates than other emails

SOURCE: [RETURNPATH](#)



3 Reasons to nurture and engage

#3 - To **Convince** and **Convert**

With that said, this is your opportunity to **set expectations** that donations are needed and key to change, impact and success.

- what's it going to take to make a change?
- what impact can a donation have?
- what do I need to give to have an impact?

Build up the ask through the series, yet ensure you are asking.

Set expectations that new subscribers and new donors will be asked again.

What can email nurturing and engagement look like?

2 RECENT CASE STUDIES

#1 - A conditionalized welcome, nurturing and engagement series.

#2 - An e-activist engagement series, enhanced with Facebook Messenger

Case Study #1:

A conditionalized welcome, nurturing and engagement series

Hypothesis was that the original welcome series was underperforming because it was **too generic** and **didn't speak to constituents interests or passions**.

3-part new subscriber and new donor welcome and engagement series.

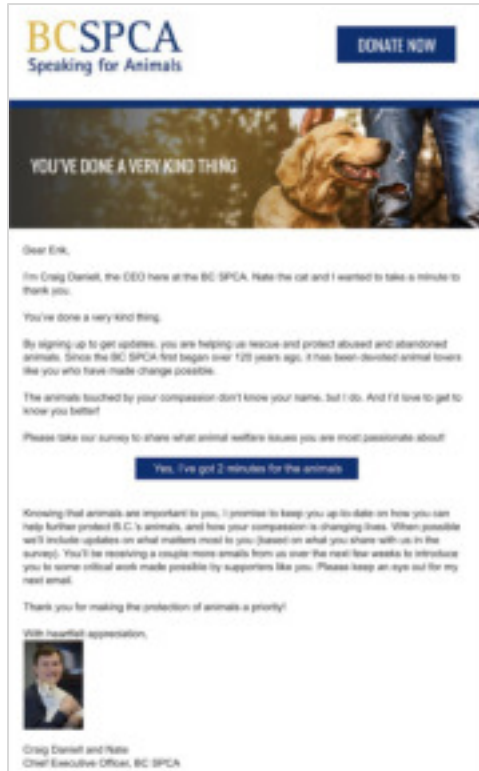
Using surveys as the micro-engagement action.

Using survey results to automate subsequent conditionalized content.



Case Study #1:

A conditionalized welcome, nurturing and engagement series



Email 1

Collect the data.

If you absolutely had to pick, which is your favourite animal?

- Cat
- Dog
- Horse
- Small Animals
- Wild Animals

(FallBack = Dogs)

Case Study #1:

A conditionalized welcome, nurturing and engagement series

When you joined our email list, you showed us that you have a big space in your heart for animals. We're so happy to see that, because there are animals in British Columbia that need your help!

What happens in puppy mills is the stuff of nightmares for dogs and dog-lovers alike. Stacked crates full of dogs who can barely move... cages of mothers with puppies in dark and unheated buildings. They're dirty. They're starving. Often they have open sores and wounds that go untreated. Sometimes they die, not knowing that folks like you and me are out there fighting for them. It breaks my heart, and enrages me that this cruelty continues.

Meet Evink. He was one of those puppies. He was rescued from his nightmare thanks to donations from special people like you.



During the largest puppy mill investigation in B.C. history, Evink and 82 other dogs and puppies were rescued from heart-wrenching, deplorable conditions.

It was terrible, Bob. They were malnourished and suffered from broken limbs, missing ears and eyes, infections and abscesses, advanced dental disease, severe matting with their fur matted in dead tangles, and painfully overgrown nails. We soon discovered that many were also suffering from long-term psychological damage.

Today, with the love and generosity of supporters like you, Evink is transformed, and happy in his loving forever home. How do we fund this critical, life-saving work? With donations from people like you.



Can you donate \$20, or as much as you are able, today? Join us to create happy endings for dogs like Evink.

[DONATE NOW](#)

Email 2

Tell the right story.

Cat person



Or else dog story



Hi Sandra,

When you joined our email list, you showed us that you have a big space in your heart for animals. I'm so glad you do, because there are animals in British Columbia that need your help!

When he was found by the side of the highway, Nelson been shot seven times in the face by a pellet gun and had a huge knife gash across his neck.

Sandra, it appeared that somebody had tried to sever his head. Tried, and failed. Nelson was alive.



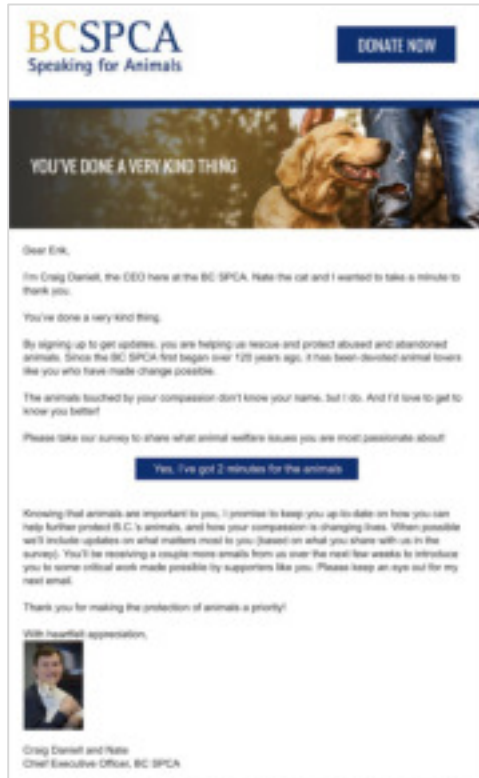
What happened next with Nelson was thanks to the love and compassion of cat-lovers like you. With serious wounds, and neurological damage, it took months of rehabilitation for Nelson to heal and learn to walk again. Today, with the love and generosity of supporters like you, **Nelson is transformed, and happy in his loving forever home.**

Here at the BC SPCA, we see some awful and inhumane things. But we also see miracles, connections made, and lives transformed. How do we fund this critical, life-saving work? With donations from people like you.

Can you donate \$20, or as much as you are able, today? Join us to rescue, care for and rehabilitate cats like Nelson.

Case Study #1:

A conditionalized welcome, nurturing and engagement series



Results

A 400% increase in donations from the previous welcome series.

Case Study #2: An e-activist engagement series, enhanced with Facebook Messenger

Lead Gen TEST

Hypothesis was whether an **automated stream of messages via facebook messenger** to support the automated engagement and nurturing series of emails would enhance engagement and improve actions, open rates and conversions to OTG donors.



The image shows a screenshot of a Facebook Messenger advertisement. At the top left is the UNHCR Canada logo, followed by the text "UNHCR Canada" and "Sponsored (demo)". The main text of the ad reads: "Violence in Yemen has left Sabah a widow and her daughter, Salam, with sight in only one eye. More than 22.2 million Yemenis are in need of aid. Learn more about how you can protect vulnerable families today." Below the text is a photograph of a young child with curly hair, looking down with a sad expression. In the bottom left corner of the photo is the UNHCR logo. At the bottom of the ad, there is a call to action: "Help make a difference for Yemeni families today." and a "Sign Up" button.

Case Study #2: An e-activist engagement series, enhanced with Facebook Messenger

4-part email series was written and setup in EN's marketing automation module.

Sent over **6 days after** a person signs a pledge via Facebook or EN to then receive emails from the UNHCR.

Each email has a different signatory and sender name.

No emails contain design elements.

- Text only, "from the field".

Case Study #2: An e-activist engagement series, enhanced with Facebook Messenger

Email 1: Thank you. Focus on urgent and ongoing crisis. What's been accomplished so far. **ASK** to **WATCH** 5 things you need to know about Yemen video.

Email 2: Focus on a single person story and the non-uniqueness of this story. **ASK** to **SHARE** the video and story with family and friends.

Email 3: Brief follow-up on previous story. Here are 4 things you can do now to make a difference. **ASK** to **FORWARD** this email now to family and friends to watch the video. Soft “ps” ask. To donate.

Email 4: Strong fundraising appeal before the subsequent fundraising appeal series. **ASK** to **DONATE** with supporting impact statements for each level of suggested gift amount.

Case Study #2: An e-activist engagement series, enhanced with Facebook Messenger

However...

50% of Facebook pledge signers only received the email series followed by a subsequent e-appeal series.

50% received the email series plus a series of automated messages each day for **14 days** via facebook messenger.



UNHCR Canada  Written by M+R (?) · November 20 at 2:18 AM ·  Like Page  ***

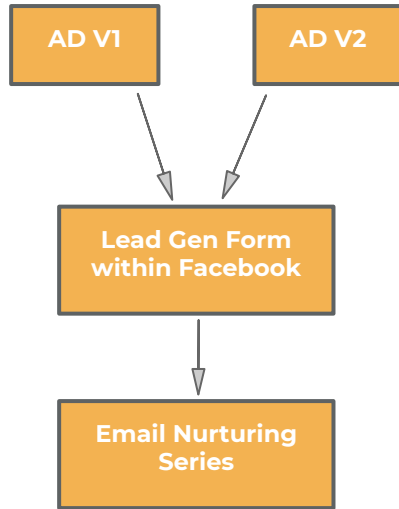
The UN Secretary-General has called it "the world's worst humanitarian crisis."
More than 22.2 million Yemenis are in need of aid.
Learn more about how YOU can make a difference today.

 **UNHCR**

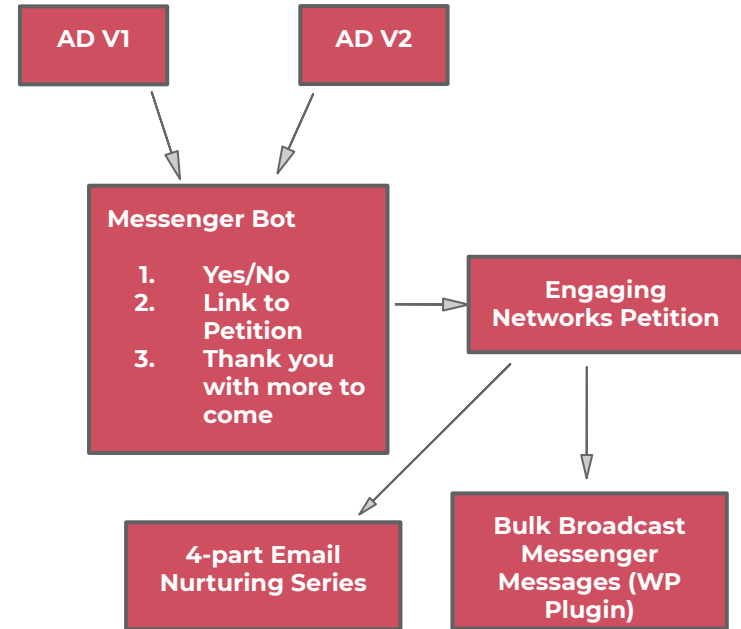
Help get aid to where it's needed most.
Everyday civilians in Yemen are paying the cost of war. Sign Up 

Case Study #2: An e-activist engagement series, enhanced with Facebook Messenger

Flow 1: Lead Gen w/Facebook



Flow 2: Lead Gen w/Messenger Enhancement



Case Study #2:

An e-activist engagement series, enhanced with Facebook Messenger

Hi! Thank you for showing compassion for the people of Yemen. Did you know about the humanitarian crisis in Yemen before today?

That's good to hear Elizabeth.

We feel like lack of awareness is a huge issue for this crisis, and that's why we're trying to get people to take action on this pledge to spread awareness.

Will you sign the pledge and share it?

https://act.unhcr.ca/page/33875/petition/?ea.tracking.id=18-ACQ9_Yemen

By taking this action and sharing it, you can help bring this crisis the attention it deserves and stand up for the 22.2 million people in need of humanitarian aid.

We're building a network of people like you to help keep this issue top of mind. I may follow up with a few more messages over the next couple of weeks to keep you up to date on the situation.

I've got to head into a meeting now, but thank you in advance for caring for the people in Yemen.

Thanks again Elizabeth.

- Jack

yes

Message 1 - immediate on ad click

Hi! Thank you for showing compassion for the people of Yemen living through the world's worst humanitarian crisis. Did you know about the situation in Yemen before today?

IF Yes,

We need your help to bring this crisis the attention it deserves. Stand up for the 22.2 million people in need of humanitarian aid by signing this pledge in support: ****URL****

IF No,

I don't blame you - Yemen has not received the amount of the media attention it deserves given the scale of need. Click this link to learn more: ****URL****

Case Study #2: An e-activist engagement series, enhanced with Facebook Messenger

Message 2 - 2 days after ad click

Hey, do you have a second? I thought you might want to see this: **5 things you need to know about yemen video** **VIDEO**

Message 3 - 4 days after ad click

Help us spread the word. If you know someone else who might be interested in standing up for over 2 million Yemenis forced to flee their homes, take your support further by sharing the pledge with them. **petition URL** **SHARE**

Message 4 - 7 days after ad click (send date to coincide with Email 4 of the nurturing series)

I just sent you an email - not sure if you've had a chance to read it yet - but don't let this one go unread. We need your support now more than ever. **DONATE**

Message 6, 7, 8, 9, 10 + ad-hoc personal responses.

Case Study #2: An e-activist engagement series, enhanced with Facebook Messenger

What did we see?

1. Automated messenger messages received, on average, a **75% read rate**.
2. The messenger enhanced group acquired leads at a slower rate.
 - Ads in market for 2 weeks for non-messenger enhanced acquired new 280 email addresses + 6% conv. rate
 - Ads in market for 6 weeks for messenger enhanced acquired 280 new email addresses + 3% conv. rate.*
3. The average gift for those included in the enhanced group was \$127 vs \$84 for the non-messenger enhanced group.

*With the timing, the messenger enhanced group could not be included in the EOY appeal series.

Case Study #2:

An e-activist engagement series, enhanced with Facebook Messenger

What did we learn?

- The interruption of messenger provides for a certain and higher read rate.
 - Tech and use could change, yet right now, the creation of automated messenger messages has a more unique interruption compared to email.
- Most e-activists from the messenger group will share the content on FB compared to those being asked to share via email.
- Further messenger group emails have converted since acquisition - for this particular test, we could see a long tail conversion rate.
- We're now testing this with P2P event registrations over a longer period of time to understand the impact on funds raised by participants.

That's a wrap

- “**Assumption is...**” When people first join an email list, they usually **don't** know much about you.
- They may only know very specific info through an acquisition campaign and what you've told them so far.
- They may only know some further light info from your website.



That's a wrap

- You want to **Educate, Convince** and **Inspire** your reader's heart as well as their head through storytelling, imagery and video.
- You want to **Engage** through the use of different micro-actions that help your reader to understand what it will take to make the change in the world you need them to help you to achieve.
- A **messenger bot** could be the answer to cutting through the clutter.

Thank You. Questions?

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