CharityEngine®
Powering the good to be great.

Stop Thinking Like a Nonprofit!

(You'll Raise More Money)

A little about me

**Vice President of Marketing
CharityEngine**

What We'll Cover Today

- Technology is the foundation
- The importance of unified data
- Donor intent and strategy changes
- Marketing automation
- AI superpowers
- Modern analytics

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"To improve is to change; to be perfect is to change often."
- Winston Churchill

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The Situation

Spray and pray
is not a strategy

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Fundraising strategy can be repetitive and mundane

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We've always done it this way

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Stuck in a
digital prison?

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The Stakes

For-profit marketing relies on **data and advanced tech** to run cutting edge campaigns

Buying intent signals are central to marketing effectiveness

Lost opportunities = **lost mission**

The Opportunity

# Nonprofits can market like for-profits

Six steps to market like a champion

1. Build a robust tech stack

2. Integrate your data

3. Understand and utilize donor intent

4. Leverage marketing automation

5. Flex your AI superpowers

6. Develop modern analytics

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Key Takeaways

1. Spray and pray is not a viable strategy

2. Data, advanced tech, and buying intent are key

3. There are six fundamental principles to embrace

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Step 1:
Build a robust tech stack
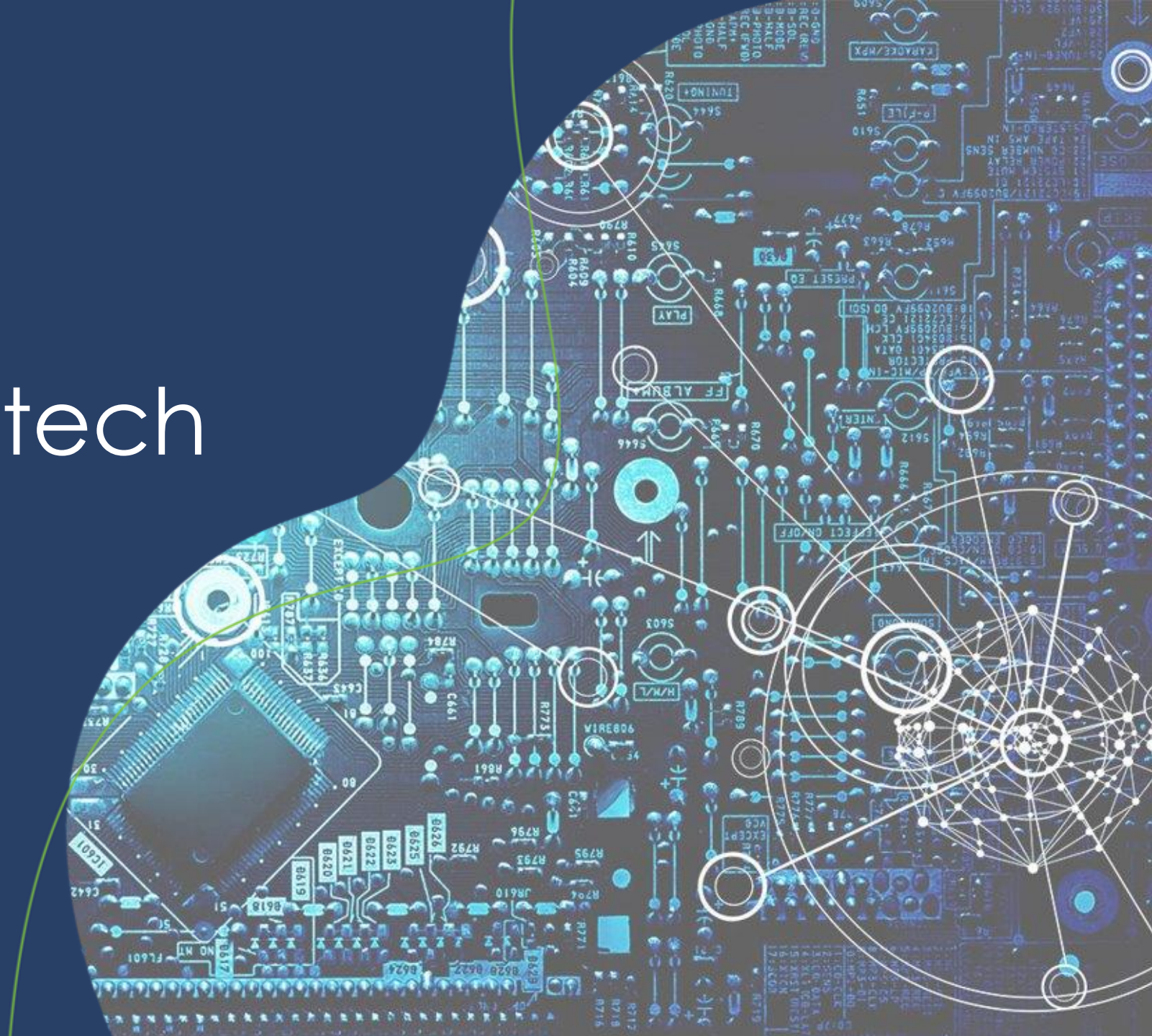
Three truths

- Technology is the foundation of your fundraising discipline
- Today's fundraiser must be highly technical and data-driven
- Core fundraising tech is mandatory but okay to have integrations outside of this core

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Core vs Non-Core Tech

Core Fundraising Tech

Email & Marketing Automation	Payments
Donation Forms	Peer-to-Peer
E-Commerce	Reporting/Analytics
Major Gifts	Events & Auctions
Memberships	Text-to-Give

Non-Core Fundraising Tech

Wealth Screening
Donation Matching
Advocacy

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Tech Stack: Best-in-Breed

Pros

- CRMs make it easy to connect multiple providers

- Tech stack flexibility, choose software that works for you

Cons

- Expensive (setup, maintenance, ongoing subscriptions)

- Limited data fields with out-of-the-box integrations (dirty little secret)

- No real-time data access

Tech Stack: All-in-One

Pros

- Rich data all in one place

- Actionable, real-time data

- No need for multiple integrations (one payment)

Cons

- Less flexible (although integrations still available)

- Confirm if true all-in-one

Key Takeaways

1. Both tech stacks are viable but …

2. One absolute truth is you need rich data at the core (not just 5 fields)

3. Any advanced marketing is only as good as the data

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Step 2:
Data is the core

Integrated data: know more, do more

- Integrated data means thousands of data points for each contact (rich data)

- Across email, P2P, events, payments, etc.

- Allows you to be smarter and work more efficiently
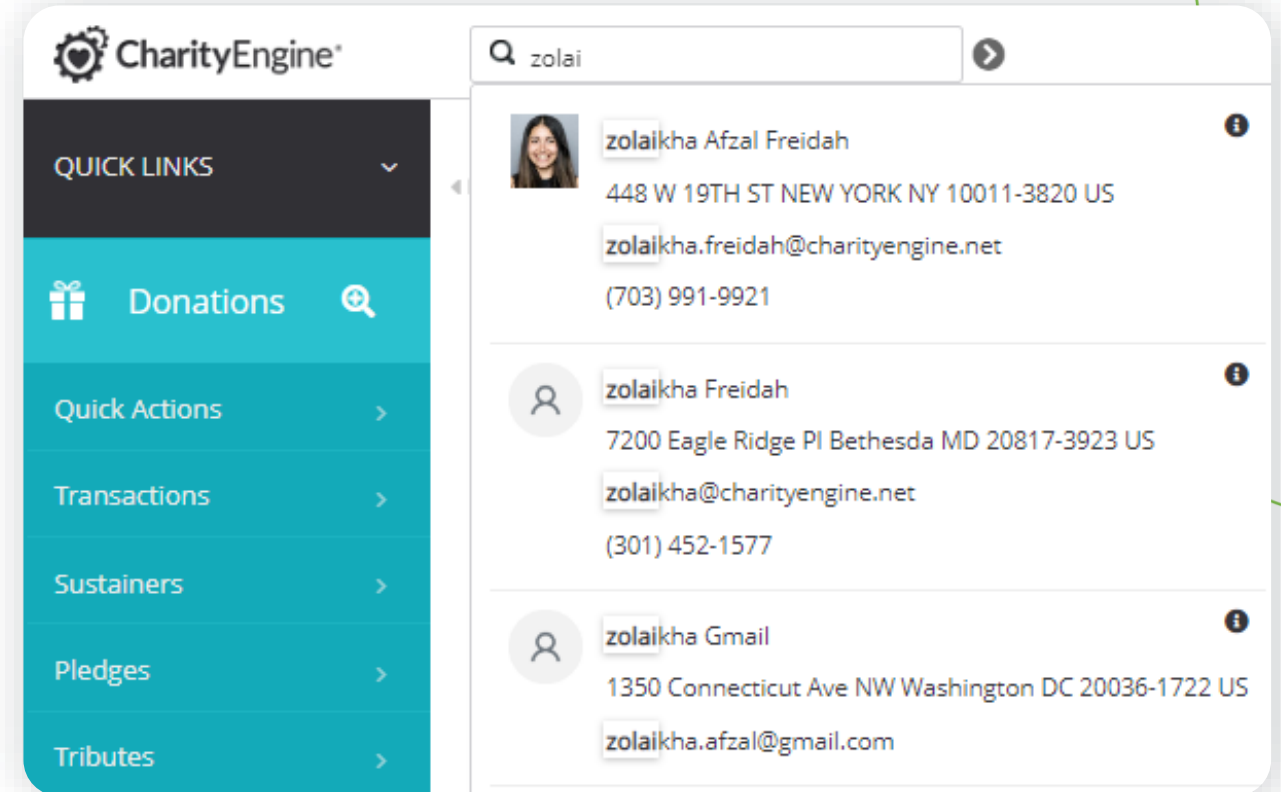
Integrated data: ask yourself…

- How accessible and actionable is our data

- How easy is it to make decisions
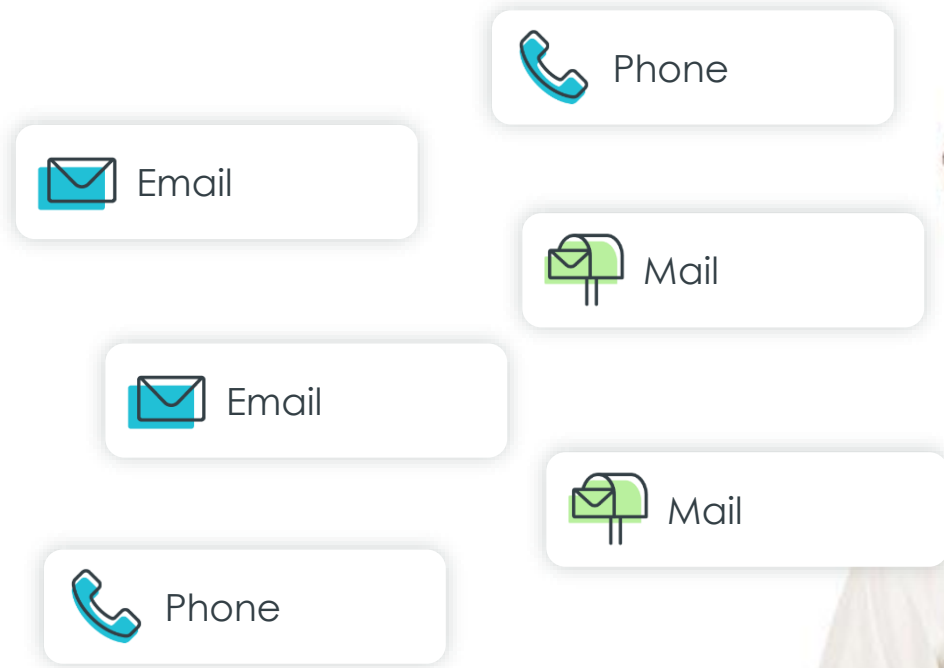
- Without integrated data…stop right here
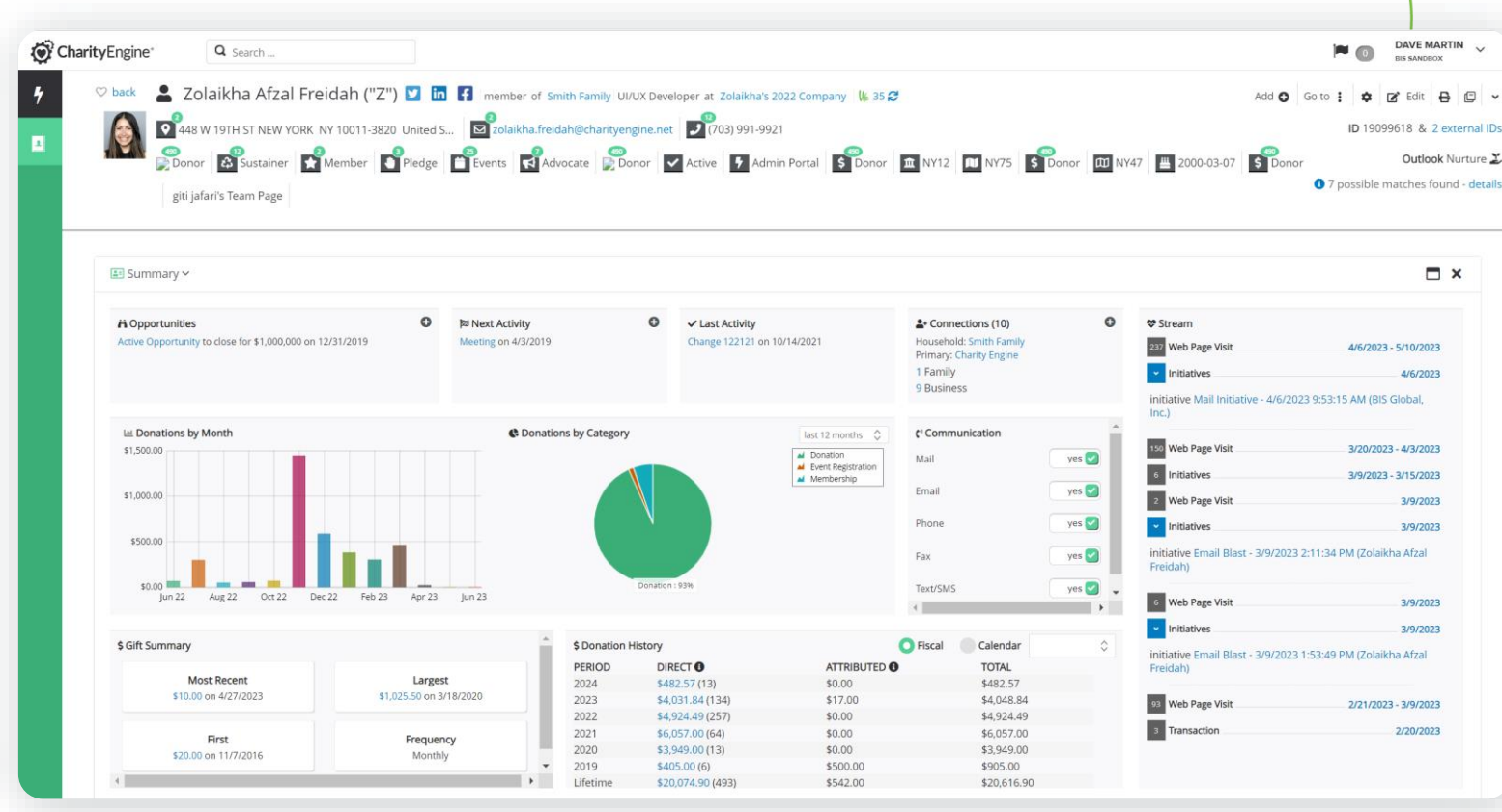
Key Takeaways

1. Integrated data is more powerful

2. Data hygiene is key

3. Make sure data is accessible

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Step 3:
Understand and utilize donor intent

Marketing with a megaphone?

Phone

Email

Mail

Email

Mail

Phone

Hope!

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Scoring donor intent

Email

Mail

Phone

SMS

DRTV

Radio

Engagement Score & Gift Probability

Gift Probability

53.22%

$20 - $50

0	30	18
Supporter	Champion	Consumer

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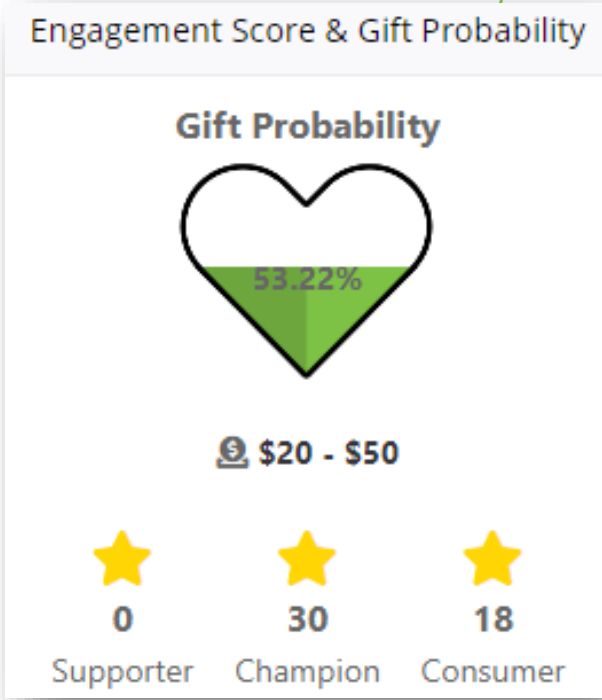
Intelligent outreach

Was runner-up bid at an auction

Registered for a golf tournament

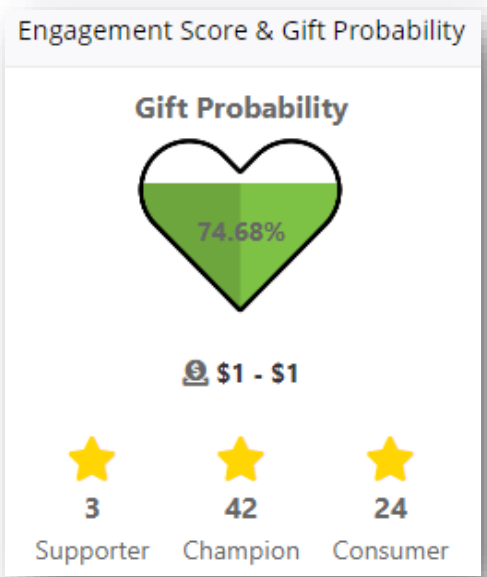Volunteers but doesn't donate

One-time peer-to-peer donor

Made shopping cart purchase

Registered for an event but not opening emails

Donor journey + donor intent

Awareness	Identification	Qualification	Cultivation	Solicitation	Stewardship
How do people first learn of your nonprofit?	Get to know who your donors are.	Begin to delve into characteristics and giving behaviors.	Engage! Reach out with the moves that will have an impact.	Make a clear, direct ask...in person if you can!	Continue to show your donors some love.

Engagement Score & Gift Probability

Gift Probability

12.99%

$18 - $22

⭐	⭐	⭐
3	42	15
Supporter	Champion	Consumer

Engagement Score & Gift Probability

Gift Probability

53.22%

$20 - $50

⭐	⭐	⭐
0	30	18
Supporter	Champion	Consumer

Engagement Score & Gift Probability

Gift Probability

74.68%

$1 - $1

⭐	⭐	⭐
3	42	24
Supporter	Champion	Consumer

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Key Takeaways

1. Don't market with a megaphone

2. Use donor intent to target and nurture (right people, right time)

3. Embrace marketing philosophies to move donors through the journey

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Step 4:
Leverage marketing automation

Email vs marketing automation

Email Automation

- Triggered by enrollment in a list

- Send pre-programmed set of emails

- Can include time delays between emails

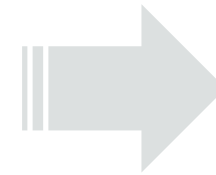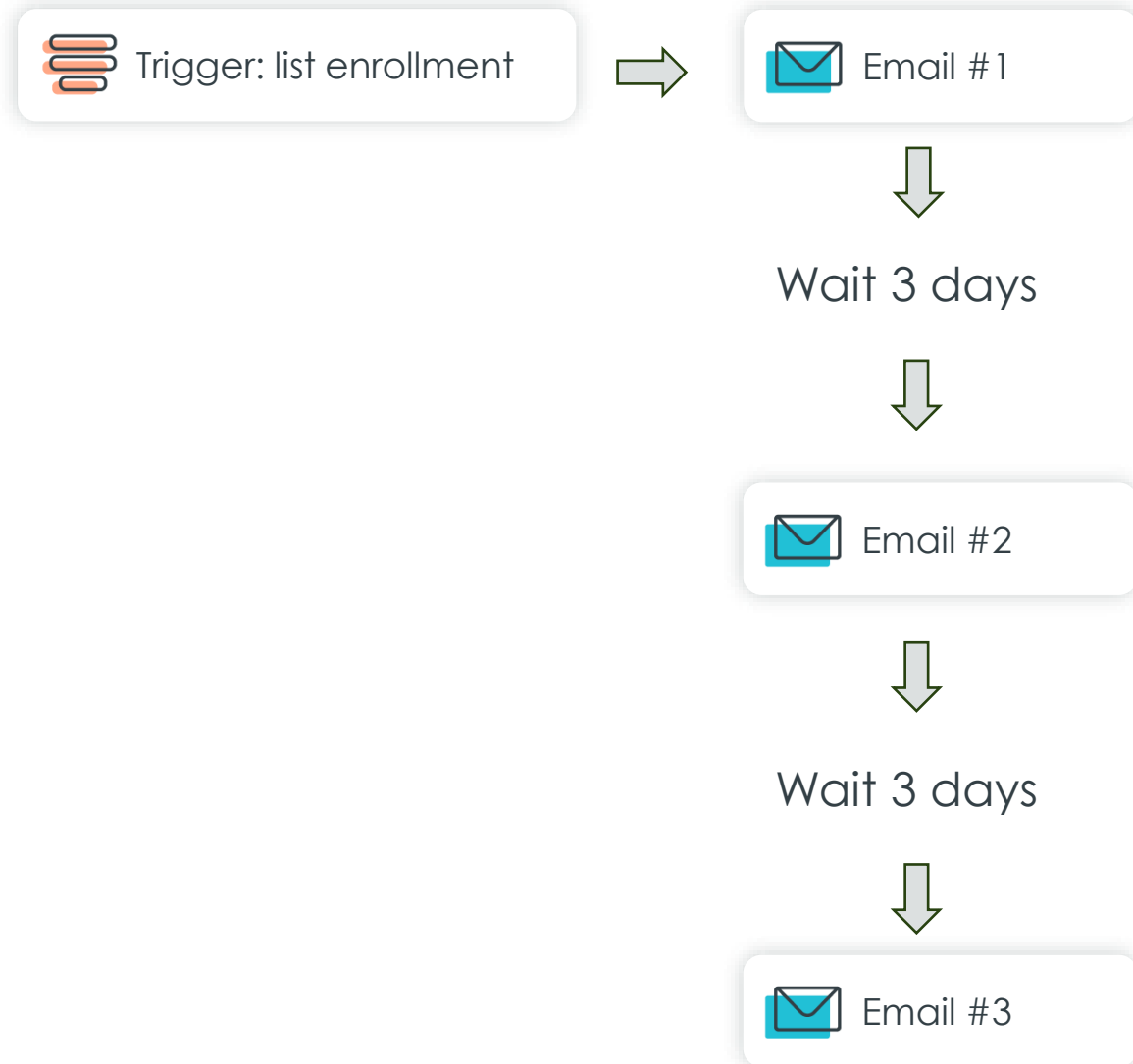- Can include branching logic (if/then)

Marketing Automation

- Triggered by enrollment in a list, an action taken, or donor journey stage

- Send pre-programmed emails, SMS, direct mail or creating a task

- Can include time delays between emails

- Can include branching logic (if/then)

** Can also include operations automations & sales automations

Email automation: the old way

Trigger: list enrollment → Email #1

↓

Wait 3 days

↓

Email #2

↓

Wait 3 days

↓

Email #3

→ **Hope!**

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Marketing automation: the new way

Triggers:
- List enrollment
- Action taken
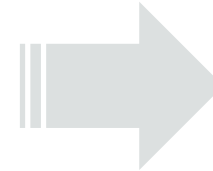- Event occurrence
- Donor journey change
- Gift probability

SMS

Wait 3 days

Email #1

Donations!

Donates? Y/N

Yes

No

Thank You Phone Call Task

Thank You Email

Wait 7 days

Email #2

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Lists are super powerful

- ✓ Lists are the intelligence (dynamic more than static)
- ✓ Enrollment can be based on any field in the CRM
- ✓ Create any audience including digital ads audiences

Key Takeaways

1. Marketing and email automation are different

2. Sequences automate fundraising and moves management

3. Focus on your lists

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Step 5:
Flex your AI
superpowers
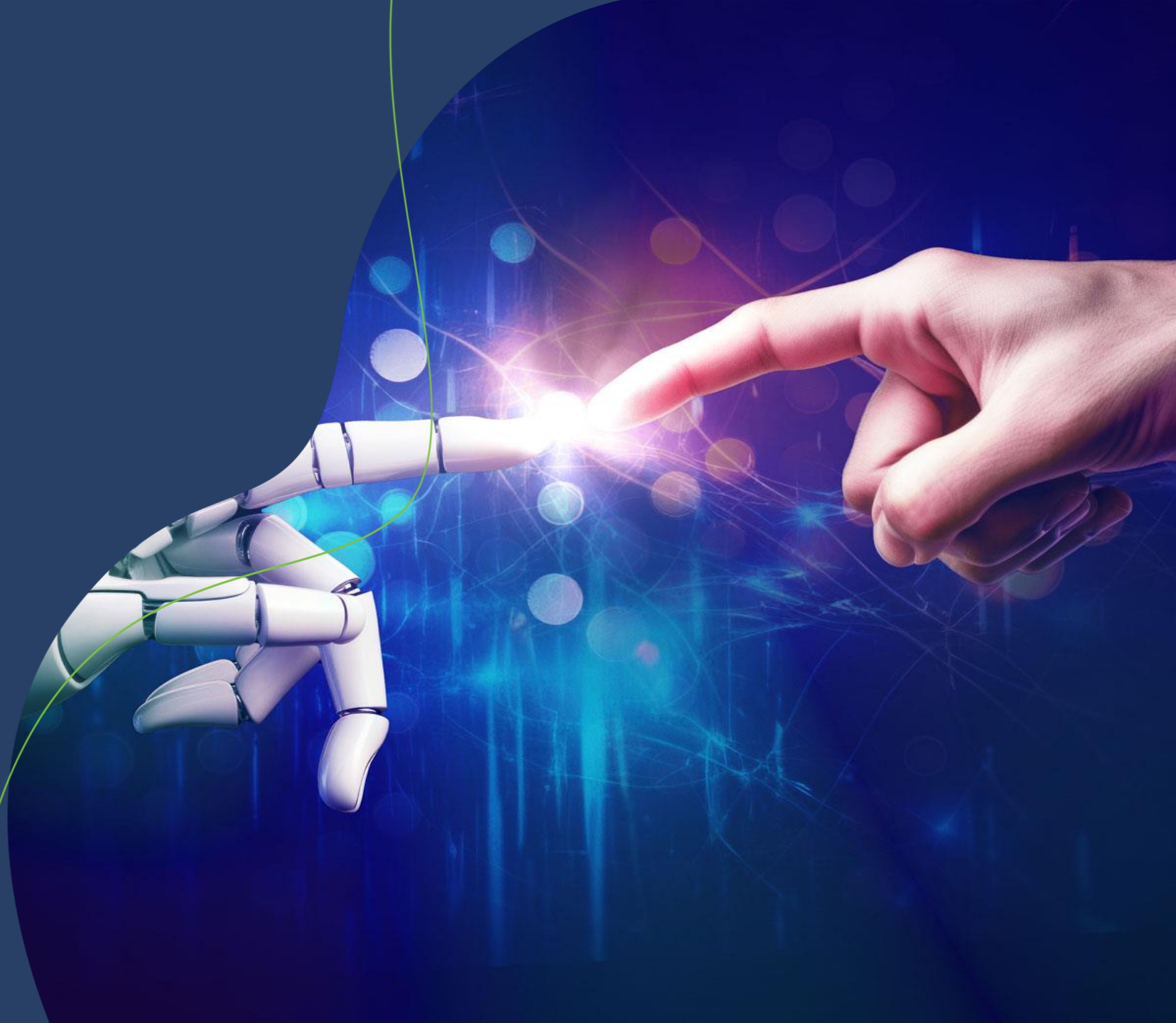
Hyper-Personalized Outreach

Writing Assistant (beta)

How's this? Click here if you want me to make some changes.

Dear Friend,

As you may already know, the world is facing some of the biggest challenges in history. Climate change, poverty, inequality, and conflict are just a few of the issues that threaten our planet and its people.

But we believe that together, we can make a difference. We can create a world where everyone has access to clean water, food, education, and healthcare. A world where we live in harmony with nature and each other.

That's why we're reaching out to you today. We need your help to save the world.

We're a nonprofit organization that works tirelessly to address some of the most pressing issues facing our planet. We work with communities around the world to provide sustainable solutions that improve lives and protect the environment.

But we can't do it alone. We need your support to continue our work and make a real impact.

Your donation will help us:

- Provide clean water and sanitation to communities in need
- Support education and training programs that empower people to build better lives
- Promote sustainable agriculture and conservation efforts to protect the environment
- Respond to emergencies and disasters around the world

Every dollar counts. With your help, we can make a real difference and create a better world for future generations.

Please donate today and join us in our mission to save the world.

Thank you for your support.

Sincerely,

[Your Name]

Writing Assist

Write a fundraising em

Style

CharityEngine + ChatGPT

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Hyper-Personalized Outreach

CRM + ChatGPT

To : Alida Quinones-Reyes (areyes@communityhousing.org)
From : Karen Rosen (karen.rosen@charityengine.net)
Subject : Noticed your interest in a CRM

Hi Alida,

It's inspiring to see the impact that Community Housing Innovations is making in providing affordable housing solutions to individuals and families in need. Your dedication to tackling the housing crisis and creating communities where everyone can thrive is truly commendable. Keep up the amazing work!

I saw that our content caught your eye — hope you found it helpful! Are you in the market for a CRM?

Would love to share some information on how CharityEngine can help Community Housing Innovations, Inc the same way it has for clients like Wounded Warrior Project and Mid-Ohio Food Bank. Organizations big and small love our platform because we have the most effective solution for your fundraising, reporting, and donor management needs.

If you're interested in learning more or if you have any questions, here's a link to my calendar.

Thanks,
Karen

CharityEngine, 8200 Greensboro Drive - Floor 15, Tysons, VA 22102, United States, 1 (866) 737-8222
Unsubscribe Manage preferences

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Hyper-Personalized Outreach

CRM + Zapier +
Bannerbear to insert
AI-powered image

A new frontier

In the works

- Connect AI and marketing automation

- CharityEngine + ChatGPT + WealthEngine + Gift Probability

- Hyper-personalized and hyper-targeted outreach

Writing Assistant (beta)

How's this? Click here if you want me to make some changes.

Dear Friend,

As you may already know, the worl
poverty, inequality, and conflict are

But we believe that together, we ca
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That's why we're reaching out to yo

We're a nonprofit organization that
planet. We work with communities
protect the environment.

But we can't do it alone. We need y

Your donation will help us:

- Provide clean water and sanitation
- Support education and training pr
- Promote sustainable agriculture a
- Respond to emergencies and disas

Every dollar counts. With your help,
generations.

Please donate today and join us in

Thank you for your support.

Sincerely,

[Your Name]

Engagement Score & Gift Probability

Gift Probability

74.68%

$1 - $1

3 Supporter

42 Champion

24 Consumer

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Key Takeaways

1. AI creates hyper-personalized outreach

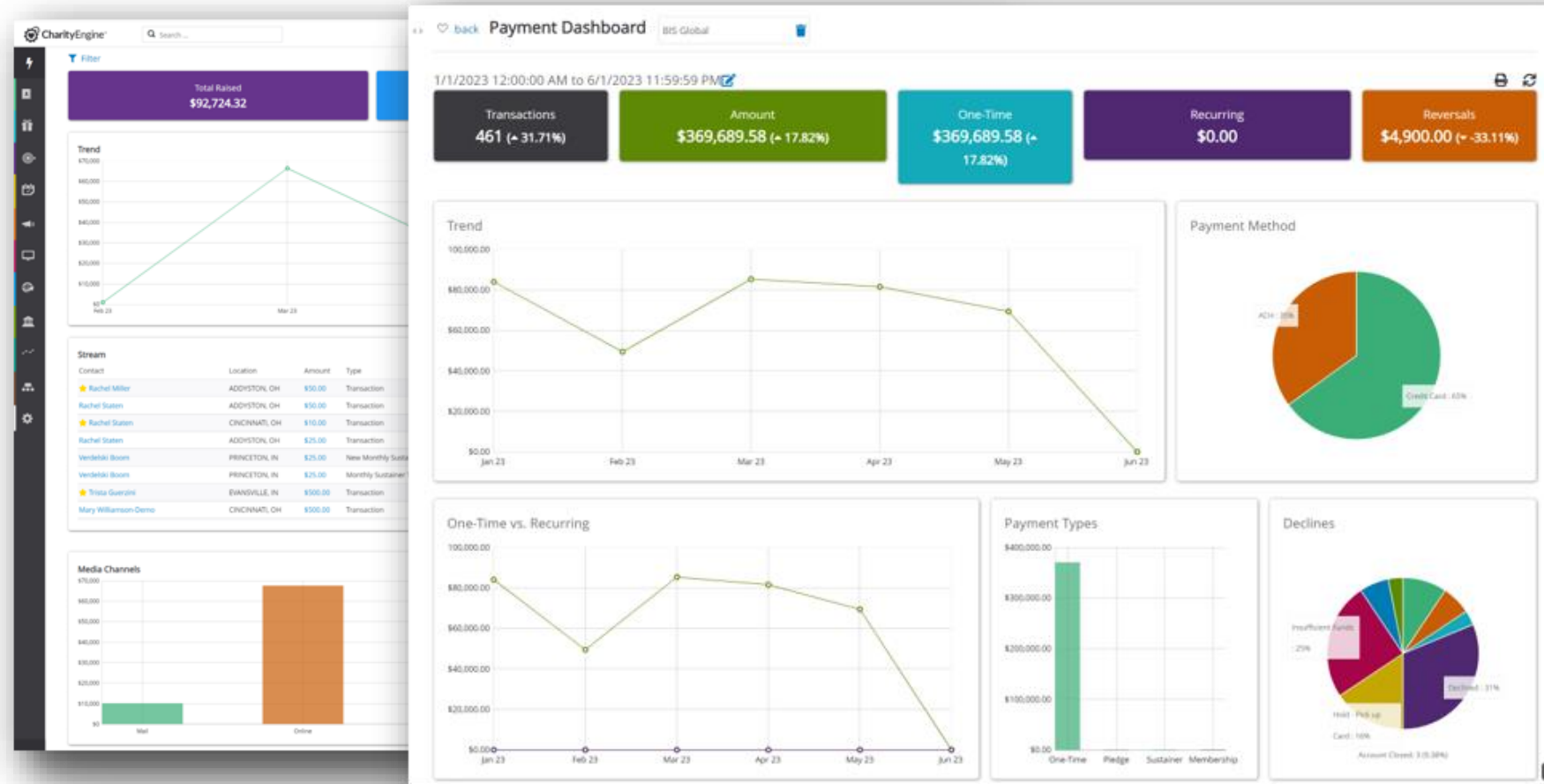2. AI exists in CRMs like CharityEngine

3. Need to experiment!

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Step 6:
Develop modern analytics

"If you're not measuring, you're not marketing."
- Anonymous

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Make the right decisions

Make the right decisions

Reporting best practices

- Identify Key Performance Indicators (KPIs)

- Measure and monitor frequently

- Can't hide from the numbers (accountability)

- Unified data makes reporting more robust

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Key Takeaways

1. Marketing effectively requires hyper-vigilance

2. Willingness to be held accountable

3. Develop dashboards that work for your organization

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Wrapping it all up

- ✓ Technology is the foundation
- ✓ The importance of unified data
- ✓ Understand donor intent
- ✓ Leverage marketing automation
- ✓ Flex your AI superpowers
- ✓ Develop modern analytics

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Questions?

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