

DONOR ENGAGEMENT

Tailoring Your Email Audience for Higher Engagement



Introduction & Learning Objective

Meet your Trainer...

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Donor Engagement

EveryAction



Agenda

Agenda

1. Using Create A List for Searching
2. Best Practices for Optimizing your List for Email Deliverability
3. Using A/B Testing in Targeted Email
4. Q&A

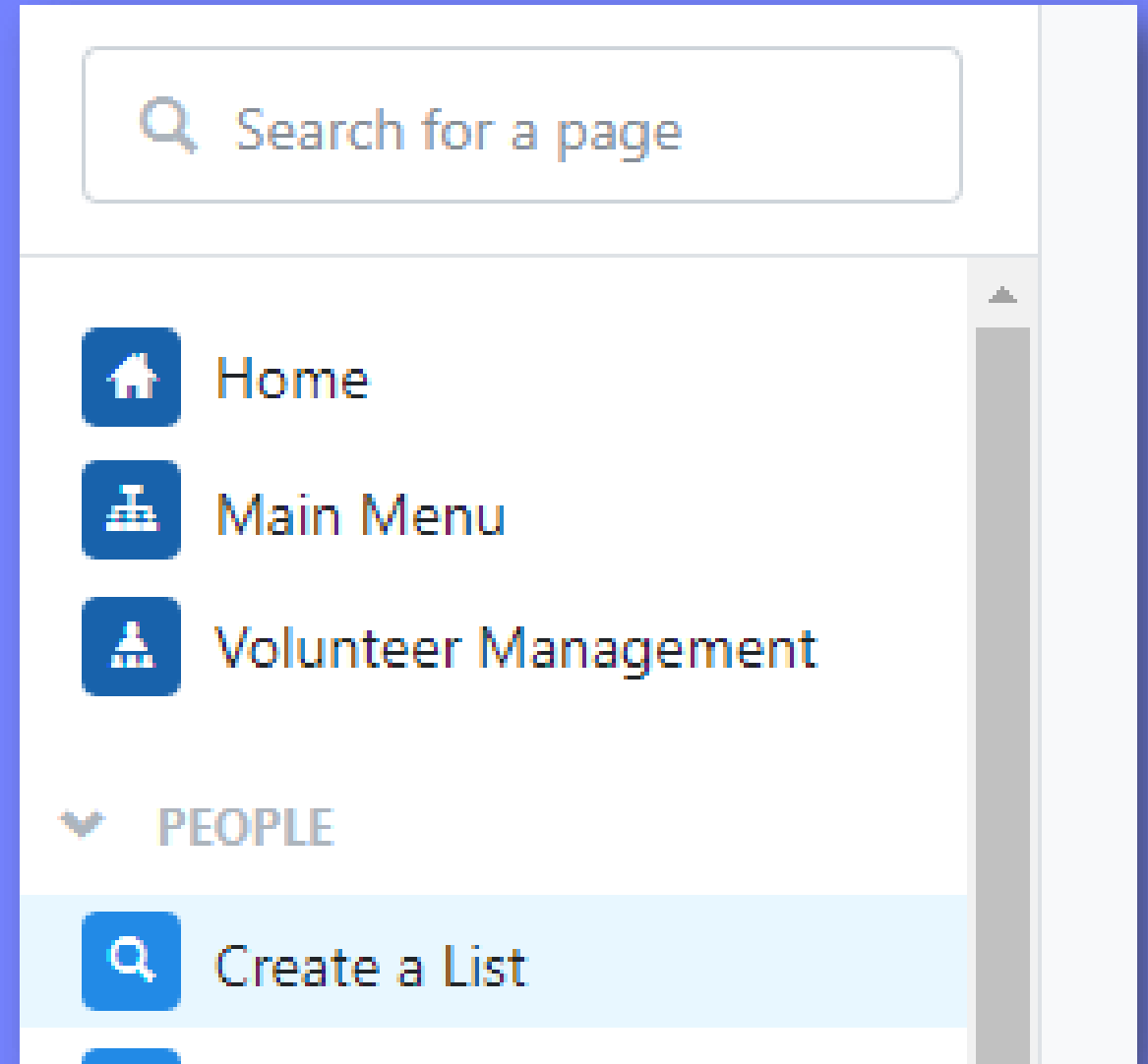
Using CAL for Searching

Using Create a List for Searching

Create a List is a powerful search tool that can help you build lists for segmentation, create searches that can be used dynamically to **create audiences for Targeted Email** and help you track the results you get from your outreach efforts!

Getting Started:

- To begin, select **Create A List** from the **Sidebar** or from the **Main Menu**



Create a List: Basics

Once CAL is opened, you will see that the search criteria options are broken down into page sections which are organized alphabetically.

Each section can be expanded using the drawer to select or enter specific criteria for searching.

CONTACTS

Create A New Search

New Search Open Save

Step 1: (Start with anyone who meets the selected criteria)

FAVORITES
Click the stars below to move search criteria to the top.

OTHER SEARCH CRITERIA

- Activist Codes
- Addresses
- Attached Files
- Canvass Status

Suppressions
exclude Deceased
and include Bad Address
and exclude Do Not Walk
and exclude Do Not Call
and include Do Not Email
and exclude Do Not Mail
..less

Preview My Results

+ -- People

+ Add Step Run Search

Running this search will clear your current list of 0 people.

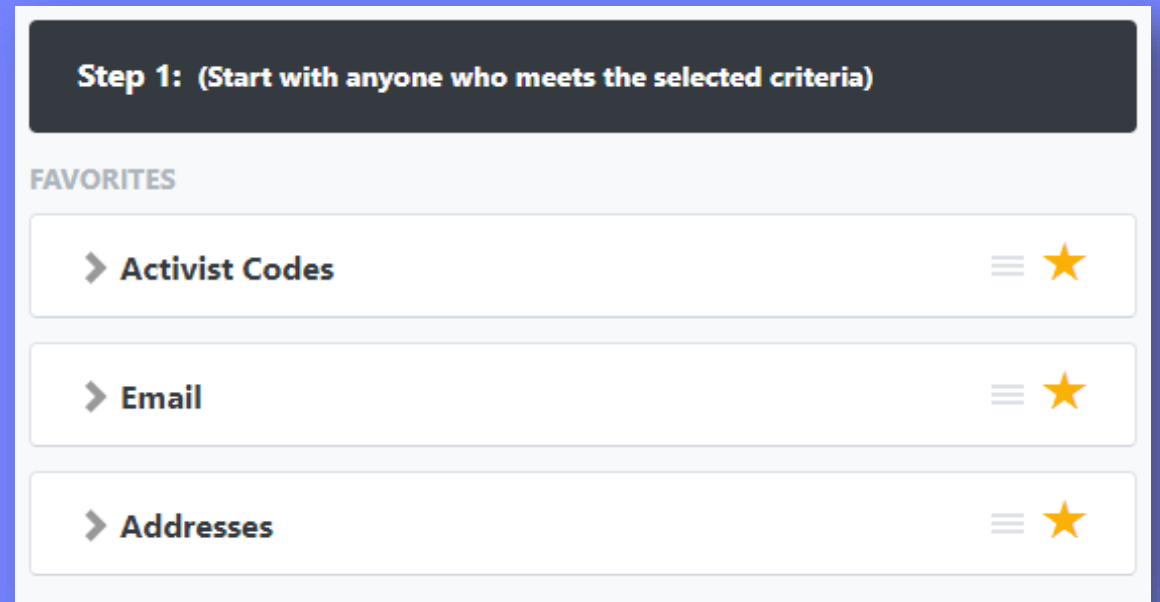
▼ Activist Codes

Activist Code

Create a List: Favorites

You can use the star icon to the right of a section to mark it as one of your **Favorites**, and that section will appear at the top of your Create a List page.

Within your **Favorites**, you can drag and drop the sections to create a preferred arrangement and Create a List will default to this arrangement for future searches.



Create a List: Preview My Results and Run Search

As you make changes to your search, you can use **Preview My Results** to get a sense of how many people will be included without actually executing the search. This allows you to adjust your parameters without having to go back and forth between pages.

You can also expand the count at the bottom to expose numbers for phones, doors, and mailboxes with the plus sign.

When you're satisfied, select **Run Search**.

The screenshot shows a search configuration interface. At the top, a dark header bar contains a back arrow and the text "Step 1: New Search". Below this, the search criteria are listed under two sections: "Districts" and "Suppressions".

- Districts:** County = Berkshire and State = Massachusetts
- Suppressions:** exclude Deceased and include Bad Address and exclude Do Not Walk and exclude Do Not Call and include Do Not Email and exclude Do Not Mail

A blue button with a magnifying glass icon and the text "Preview My Results" is positioned below the filters. Below the button, the search results are summarized as "1 People", with a sub-count of "1 Phones", "1 Doors", and "1 Mailboxes". To the left of this summary is a square button with a minus sign. At the bottom, there are two buttons: a white button with a plus sign and the text "Add Step", and a green button with a play icon and the text "Run Search".

Create a List: Adding a Step

You can create a more complex search by using Add Step in the right column to add, remove, narrow, and household results based on additional criteria.

You can delete steps by clicking the trash can icon or edit the step by clicking the pencil icon next to the step name.

The screenshot displays a search interface titled "Step 1: New Search". It includes the following search criteria:

- Districts**
 - County = Berkshire
 - and State = Massachusetts
- Suppressions**
 - exclude Deceased
 - and include Bad Address
 - and exclude Do Not Walk
 - and exclude Do Not Call
 - and include Do Not Email
 - and exclude Do Not Mail

Below the criteria is a blue button with a magnifying glass icon and the text "Preview My Results".

The search results section shows "1 People" with a minus icon in a box to the left. Below this, it lists "1 Phones", "1 Doors", and "1 Mailboxes".

At the bottom, there is a green "Run Search" button and a dropdown menu. The dropdown menu contains the following options:

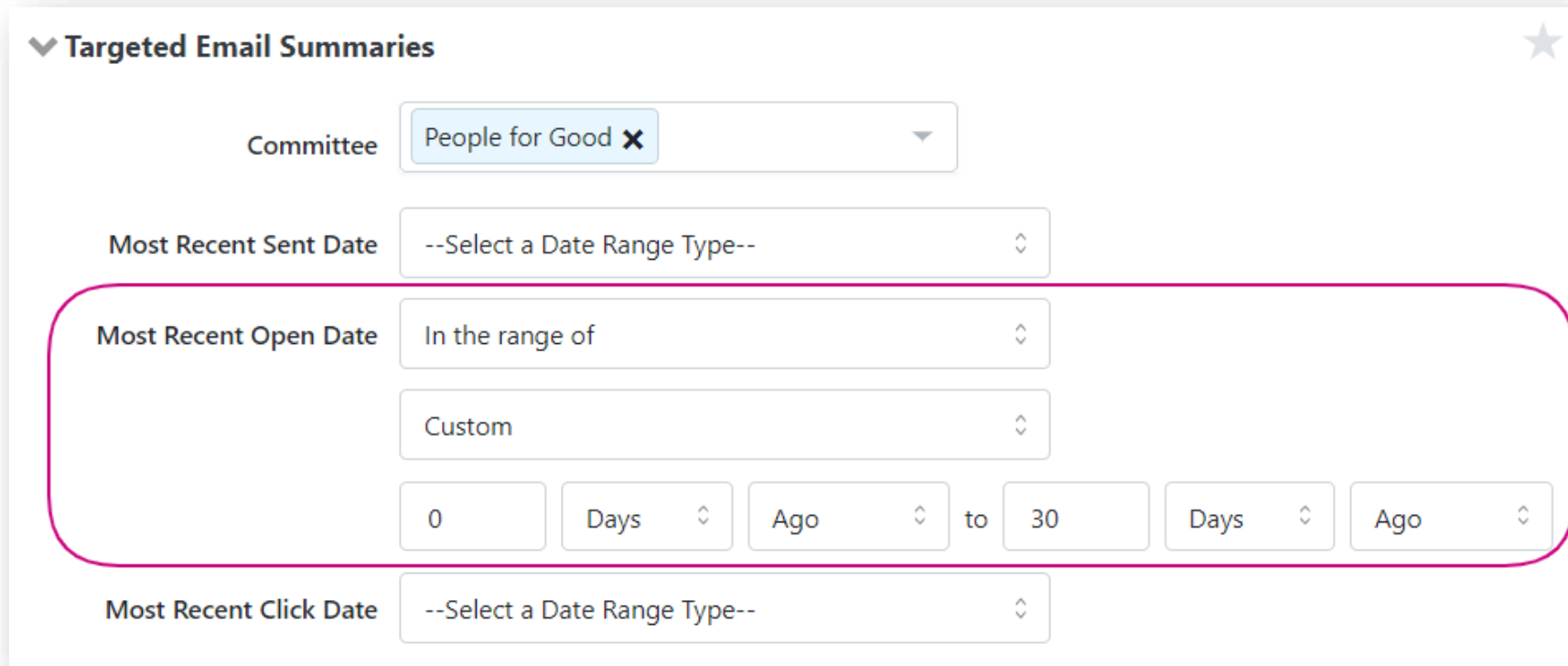
- + Add Step
- + Add People
- Remove People
- ▼ Narrow People
- 🔍 Narrow by Sample
- 🏠 Householding

A light blue box below the dropdown menu contains the text "our current list of 0 people."

Targeted Email Summaries

If you've been **sending Targeted Email for at least the last three months**, you can identify your recently active contacts and sort them into different groups depending on how long it's been since they opened your messages.

For more information about using CAL, please visit the linked help documents at the end of this webinar.



The screenshot shows a filter interface for 'Targeted Email Summaries'. It includes a dropdown for 'Committee' set to 'People for Good', and four date range filters: 'Most Recent Sent Date', 'Most Recent Open Date', and 'Most Recent Click Date'. The 'Most Recent Open Date' filter is highlighted with a red rounded rectangle and is set to 'In the range of' with a 'Custom' range of '0 Days Ago' to '30 Days Ago'.

▼ Targeted Email Summaries ★

Committee

Most Recent Sent Date

Most Recent Open Date

to

Most Recent Click Date

Optimizing Your List

Improving Email Deliverability

The two basic rules for mastering deliverability are:

- **Only send emails people want.** Sending messages to contacts who have not opted in as subscribers will result in negative engagement, like unopened email and emails marked as spam. If this happens often enough, your emails may land in the spam folders of most of your recipients.
- **Create a positive feedback loop.** Target your most engaged supporters, get positive engagement, and increase inbox placement throughout your list. The more interested supporters see your emails, the more likely they are to engage.



Choosing an Opt-In Method

All marketing emails, including political and non-profit fundraising emails, must be able to **show how and why a recipient opted-in to your mailing list.**

There are three types of opt-ins, ordered from most to least secure:

Confirmed (Double) Opt-in: Supporters fill out a form sent to their email address, affirming that by clicking the link they agree to receive marketing emails.

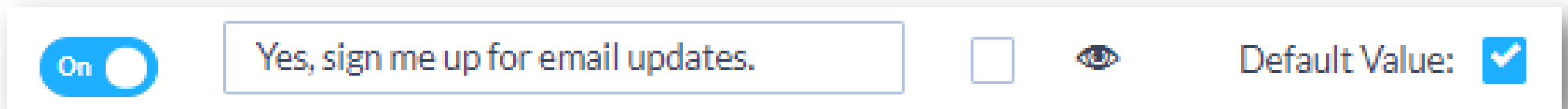
Explicit (Single) Opt-in: Supporters check a box agreeing to receive marketing emails at a certain address. This process does not, however, verify that the address owner is the same person filling out the form.

Tacit (Automatic) Opt-in: Supporters are subscribed to your marketing emails when they take an action, like donating or signing a petition. You must indicate that their engagement will result in being subscribed to your list. Like the Explicit Opt-in, this process does not verify that the address owner is the same person filling out the form.

Opting-In through Online Actions Forms

Review the Online Actions forms you're sharing with your audience. Clarify that by submitting a form they will be added to your email list. State this explicitly in with text at the top and provide the option to opt-out.

In the Build step for your form, **enable Yes, sign me up for email updates** and make it visible (the eye icon is NOT crossed out). You can choose to have **this option checked by default**. **Your audience can uncheck it before submitting the form.**



The image shows a configuration bar for a form option. On the left is a blue toggle switch labeled 'On' which is turned on. Next to it is a text input field containing the text 'Yes, sign me up for email updates.'. To the right of the text field is an unchecked checkbox. Further right is an eye icon, which is not crossed out, indicating the option is visible. On the far right is a 'Default Value:' dropdown menu, which is currently set to a checked checkbox.

Diminishing your Email Reputation

Renting or trading your list with another organization can damage your sender reputation irreparably. It also runs counter to your goals of sending emails only to recipients who want them and maintaining a positive feedback loop.

Our Terms of Service prohibit renting and trading lists. Addresses sent from Targeted Email must be known contacts who have opted into your email program. Review the Terms of Service before you complete the Review and Deliver Message step of any draft email.

Confirm and Deliver

By sending or scheduling an email, you agree to our [Terms of Service](#) If you have any questions please [email support](#).

I have reviewed my message for errors or issues, and agree to the Terms of Service.

Understanding Spam Traps



Types of spam traps:

Pristine spam traps are email addresses created to ensnare spammers. Not used for any other purpose, they can only be added to your list through list trades or unethical sign-ups and indicate to providers that you're not following best practices.

Recycled spam traps are email addresses that were valid at one point. After a period of inactivity, during which they hard bounce, these email addresses are turned back on and used to trap spammers.

Typo spam traps are email addresses with misspelled domain names, like [gmil.com](#) rather than [gmail.com](#). Your list may include addresses like this because of innocent error, however, when providers see these addresses it signals poor list management.

Monitoring your Success

To see how well your efforts are working, run an **Email Performance Report**.

Group the report by Email Domain and sort by the recipient column **to see how your email program fares across the major providers**, Oath (Yahoo/AOL), Microsoft, and Google.

If a particular domain has a lower than average open rate, some element of your email program is sending a red flag to that provider.

Report Summary

Sent Date	Recipients	Unique Op...	Unique Clic...	Conversions	Co
4/17/20	617	20.00 % 124	15.00% Total: 93	68	

✕ Email Domain ✕

	Email Domain	Sent Date	↓ ¹ Recipients	Unique Open Rate	Unique Click Rate
➤	gmail.com	4/17/20	359	50.00 %	27.00%
➤	aol.com	4/17/20	18	0.00 %	0.00 %
➤	icloud.com	4/18/20	23	69.0%	19.00%
➤	yahoo.com	4/17/20	217	43.00%	5.00%

Using A/B Testing

What is A/B Testing?



Different 'variants' of an email message are created (in Targeted Email a single test can have 2-10 variants)



Each is sent to a different, random subset of a target audience



Most successful variant is determined and send to remaining audience

Create and Send A/B Testing Emails

Targeted Email allows you to test a variety of different parts of your email, including sender name, sender email, subject line, and the content of your email.

A/B Test Tips

- Test one element at a time so that you know what generates increased engagement.
- Select a segment with enough subscribers to run a test. Testing with too few subscribers can return inaccurate results.

For a step-by-step tutorial for setting up your A/B testing, please visit the linked help documents at the end of this webinar.



Q&A

Q & A



Additional Resources

Support

- Contact your System Administrator
- Email help@EveryAction.com
- Call (202) 370-8050
- Submit a Support Request Ticket from the Main Menu of the EveryAction CRM



Help Center Resources

- [Using Create A List for Email Segmentation](#)
- [Best Practices for email deliverability: Optimizing your list](#)
- [How to: Send A/B Testing Emails](#)
- [Feature Webinar: A/B Testing in Targeted Email](#)



Additional Training

- Bonterra Academy:
<https://help.everyaction.com/s/article/Bonterra-Academy-Self-Signup>
- Foundational Webinar Series
- Upcoming initiatives
- Videos in Bonterra Academy



Thank You for Attending!

