



How Nonprofits Can Win With Account Engagement



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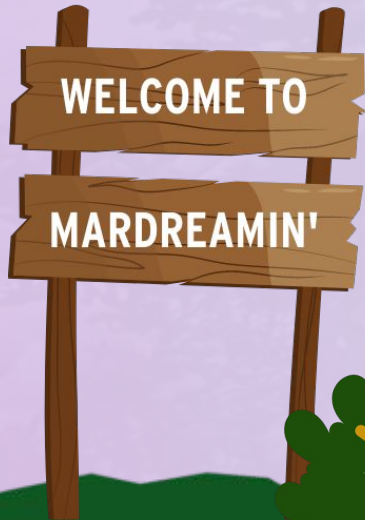
GRIDMATE

THE SPOT
by SERCANTE

FIONTA

Agenda

- Intros and Overview
- Welcome Series - New Donor
- Membership Renewals
- Event Management
- Personalization 201
- Takeaways



Welcome Series



Welcome Series

- Online donation form or manual
- Based on first gift date
- Engagement Studio
 - Email Series
 - Track link clicks to gather interest groups



Welcome Series

- Online donation or manual entry

← Donor Information

One-time donation
\$50.00 USD

First Name *

Last Name *

Email *

It's okay to contact me in the future.

Phone Number

New Donation

* Opportunity Name

Maria Kelley Donation 10/9/2023

* Close Date

10/9/2023

* Stage

Posted

Amount

50

Primary Campaign Source

Search Campaigns...

Cancel

Save

Welcome Series

▼ Donation Information

First Gift Date	↔	Last Gift Amount	↔
10/9/2023	🗑️	\$50.00	
Last Gift Date	↔	Largest Gift	↔
10/9/2023	🗑️	\$50.00	
Average Gift		Smallest Gift	↔
\$0.00		\$50.00	
Best Gift Year		Best Gift Year Total	

- Build a dynamic list to show everyone who has a first gift date of today (for one welcome email)
- Or, start on a specific date (for a series of emails)

First Gift Date = today 📄 BUILDING 🔍 TESTING 🖋️ Basic Info ⚙️

Dynamic List Rules

Match type ^{*} Match all Match any

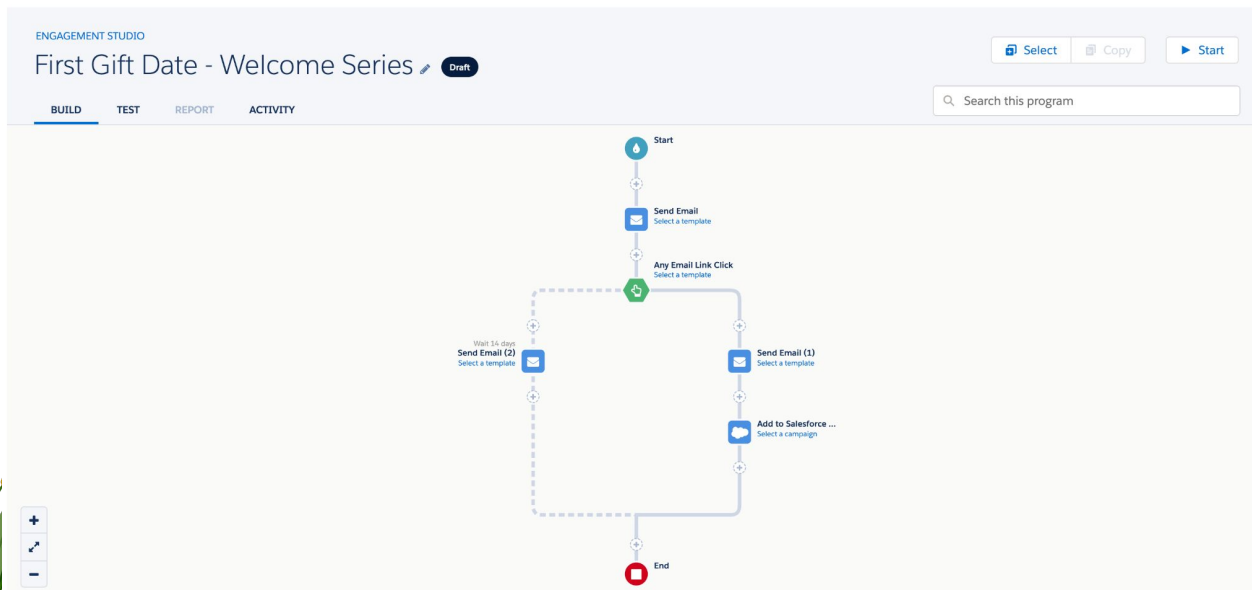
+ 🗑️ Prospect custom field ▼ First Gift Date ▼ days in future greater than or ▼ 0

+ Add new rule + Add new rule group

Preview Run Rules Cancel

Welcome Series

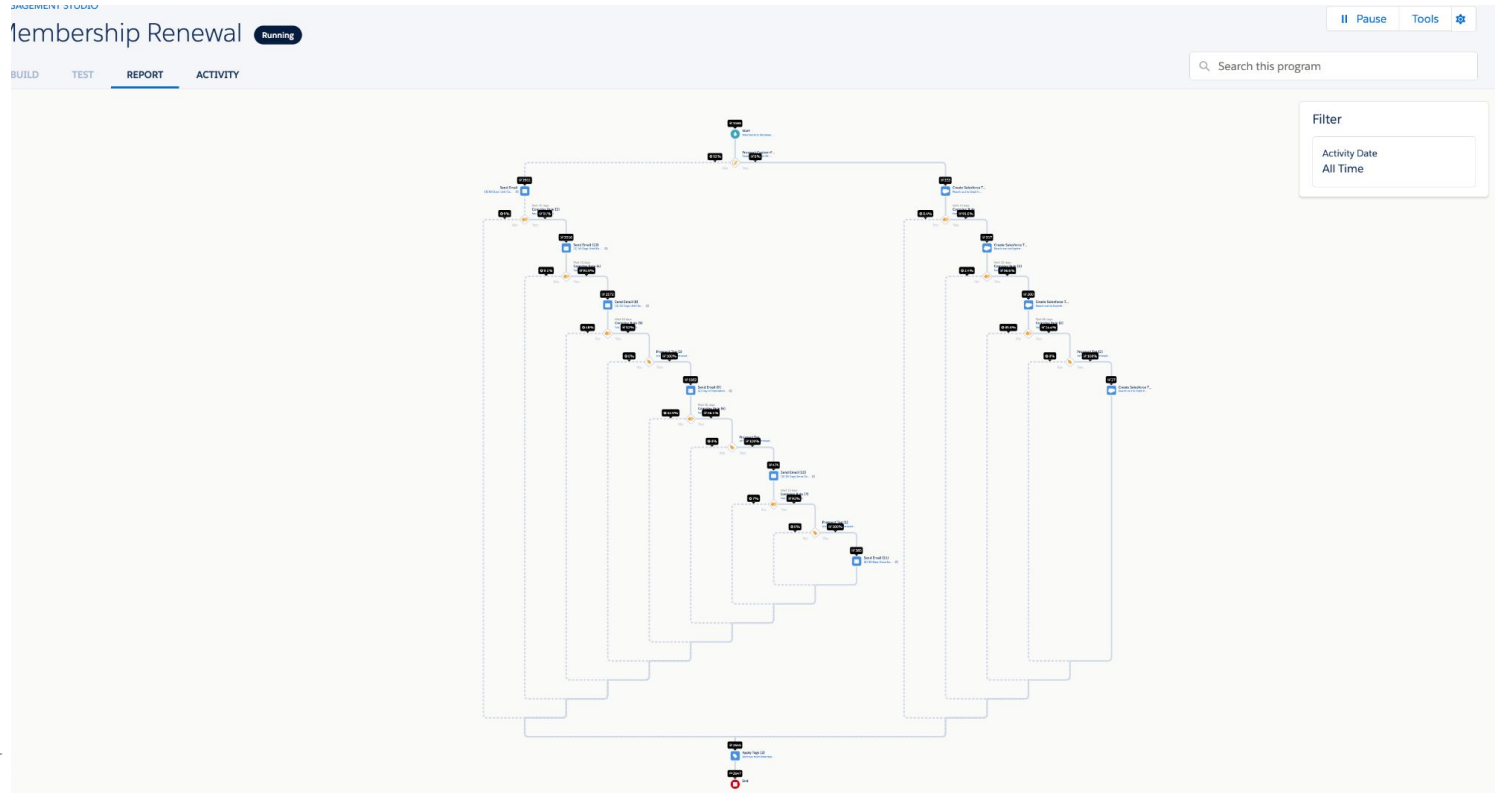
- Create an Engagement Studio Campaign to send one email or a series of emails about your organization



Renewal Reminders



Simple, or More Involved





Gremlin Alert!



What Happens Next Year?

When someone is removed from an Engagement Studio program and rejoins later, **they start back up where they left off.**



Renewal Tips & Tricks

- **Static List + Automation Rules, not Dynamic List!**
- **Repeat ES; Allow Emails to be sent more than once**
- **Everyone completes the journey**
- **Tags are useful**
- **Consider personalized touches**

Event Management



Event Management

First Name

Company

How did you hear about this event?

Phone

Title/Department

Register



Completion Actions

Action	Campaign	Campaign Member Status
Add to campaign	2023 Annual Dinner	Registered
Action	User	
Assign to user	George Riechmann	
Action	List	
Add to list	2023 Annual Dinner List	
+ Add Action + Add Conditional Group		


- Create a form in Account Engagement
 - Link in email invitation
 - Link on social media
- Completion Actions








Event Management


- Track Campaign Members in Salesforce Campaign
- Use Campaign Member Status to track attendance

 Campaign **2023 Annual Dinner** 

Campaign Record Type	Type	Status	Start Date	End Date
Event Campaign	Annual Dinner	In Progress	11/3/2023	

Related List Quick Links 

-  [Campaign Hierarchy \(0\)](#)
-  [Sponsors \(10+\)](#)
-  [Campaign Member Statuses \(3\)](#)
-  [Campaign Members \(10+\)](#)
-  [Landing Pages \(0\)](#)
-  [Marketing Links \(0\)](#)
-  [List Emails \(5\)](#)

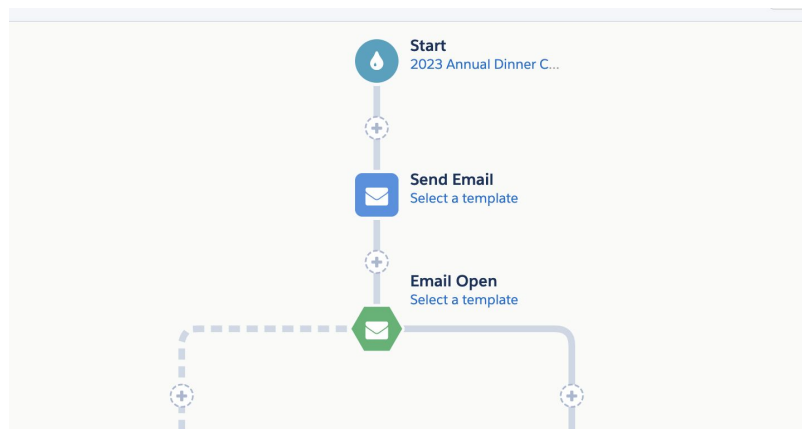
 Campaigns > 2023 Annual Dinner
Campaign Member Statuses

3 items • Sorted by Member Status • Updated a few seconds ago

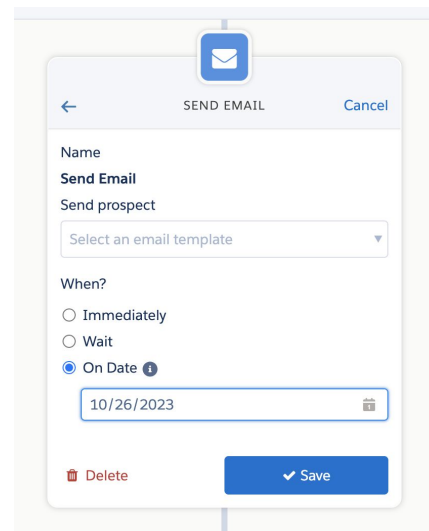
	<input type="checkbox"/> Member Status ↑	<input type="checkbox"/> Is Default	<input type="checkbox"/> Responded
1	<input type="checkbox"/> Declined	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2	<input type="checkbox"/> Registered	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3	<input type="checkbox"/> Sent	<input checked="" type="checkbox"/>	<input type="checkbox"/>



Event Management



- Use Engagement Studio to send confirmation emails, reminders



The screenshot shows the 'SEND EMAIL' configuration interface. At the top, there is a back arrow, the title 'SEND EMAIL', and a 'Cancel' button. Below this, the 'Name' field is set to 'Send Email'. The 'Send prospect' dropdown menu is set to 'Select an email template'. Under the 'When?' section, the 'On Date' option is selected, and the date '10/26/2023' is entered in the date picker. At the bottom, there are 'Delete' and 'Save' buttons.

Event Management

50+ items • Sorted by Email • Updated a few seconds ago

	<input type="checkbox"/>	Type	▼	Status
1	<input type="checkbox"/>	Contact		Registered
2	<input type="checkbox"/>	Contact		Registered
3	<input type="checkbox"/>	Contact		Registered
4	<input type="checkbox"/>	Contact		Declined
5	<input type="checkbox"/>	Contact		Registered
6	<input type="checkbox"/>	Contact		Attendee
7	<input type="checkbox"/>	Contact		Registered
8	<input type="checkbox"/>	Contact		Attendee
9	<input type="checkbox"/>	Contact		Registered
10	<input type="checkbox"/>	Contact		Registered
11	<input type="checkbox"/>	Contact		Registered
12	<input type="checkbox"/>	Contact		Registered
13	<input type="checkbox"/>	Contact		Registered
14	<input type="checkbox"/>	Contact		Registered
15	<input type="checkbox"/>	Contact		Registered
16	<input type="checkbox"/>	Contact		Registered

- Track final attendance in Salesforce Campaign
 - Can use another form for check-in
 - Use completion action to update status to 'Attendee'



Personalization 201

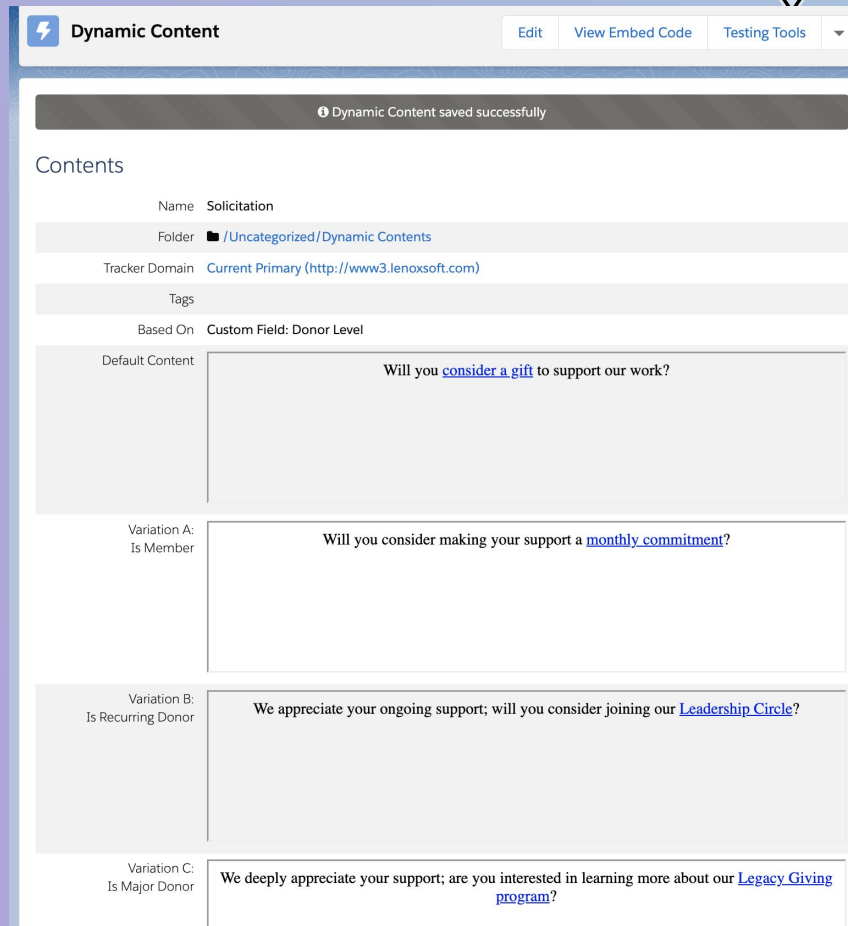


Preference Center

- **Requires some oversight**
- **Allows constituents to unsubscribe from specific topics**
- **Can ALSO be used to gather information about interests...**
 - *...if you aren't using an "everyone gets everything" approach*
- **Consider an 'opt in' approach**

Dynamic Content

- Create variations of a message based on field values
- Reusable - just one merge field!
- Emails or website (!)



The screenshot shows the 'Dynamic Content' editor interface. At the top, there's a header with a lightning bolt icon, the text 'Dynamic Content', and buttons for 'Edit', 'View Embed Code', and 'Testing Tools'. Below the header is a dark grey notification bar that says 'Dynamic Content saved successfully'. The main area is titled 'Contents' and displays a list of dynamic content items. Each item has a 'Name' field, a 'Folder' path, a 'Tracker Domain' URL, and 'Tags'. The 'Based On' field is set to 'Custom Field: Donor Level'. The 'Default Content' field contains the text 'Will you [consider a gift](#) to support our work?'. Below this are three variations: 'Variation A: Is Member' with the text 'Will you consider making your support a [monthly commitment](#)?', 'Variation B: Is Recurring Donor' with the text 'We appreciate your ongoing support; will you consider joining our [Leadership Circle](#)?', and 'Variation C: Is Major Donor' with the text 'We deeply appreciate your support; are you interested in learning more about our [Legacy Giving program](#)?'. The variations are shown in a light grey box with a white border.

Example + Details

- **Not officially supported in LEX builder, but works**
- **Included in some editions, or as an add-on**
- **Other good nonprofit use cases:**
 - Link to upcoming local events
 - Highlight different news based on interests

Hi {{{Recipient.FirstName}}},

Happy Giving Tuesday!

{{{dynamic_content_2468}}}

[Manage Preferences](#)

Hi test,

Happy Giving Tuesday!

Will you [consider a gift](#) to support our work?

[Manage Preferences](#)

Hi Brenda,

Happy Giving Tuesday!

Will you consider making your support a [monthly commitment](#)?

[Manage Preferences](#)

Hi Stephen,

Happy Giving Tuesday!

We appreciate your ongoing support; will you consider joining our [Leadership Circle](#)?


[Manage Preferences](#)

Hi Rose,

Happy Giving Tuesday!

We deeply appreciate your support; are you interested in learning more about our [Legacy Giving program](#)?

[Manage Preferences](#)



Summary & Takeaways

- Take advantage of Engagement Studio
- AE is capable of more than just email (events!)
- Think about personalization as it relates to constituent interests, and go beyond {{{FirstName}}}

Thank You!

Connect!

Maria:

<https://www.linkedin.com/in/maria-kelley-0b638435/>
<https://prolocity.com/>



Duncan:

<https://www.linkedin.com/in/duncan-mcgovern/>
<https://www.pedallucid.com/>

