

Creating an Email Welcome Series

After a constituent signs up to receive emails from your organization, it's standard practice to send them an auto-responder email that acknowledges their registration and thanks them for their interest. But what comes next? Does this new constituent simply join the rest of your supporters — some of whom have been with your organization for years — and start to receive your regular stream of online communications? Consider funneling new constituents through an email welcome series to bring them into a closer relationship with you right after sign up.

This strategy can serve as a thoughtful and purposeful welcome that promotes ongoing engagement with your organization.

Benefits

- Educate constituents about the organization and its programs
- More control over the timing of the first ask
- Promote a longer, deeper relationship with the organization

It's All About the Timing

Using an email welcome series gives you additional control over your constituent communications. Below are a few items related to timing that you will need to keep in mind when planning your email welcome series.

- **Exclude them from other messages.** If an individual signs up to receive communications from your organization on a Monday, the last thing you want to do is include them in a fundraising email campaign that is scheduled to launch later that day. Remove new constituents from the regular flow of email communications, and send them several introductory messages in a staggered, or “drip,” fashion. This approach will enable you to control the timing of your messages, as well as your first ask.
- **Play around with the timing.** You can control the number of days (or weeks) that elapse between messages, but figuring out the optimal timing can be tricky. Some organizations find that an email welcome series of one message every two weeks for two months is effective, whereas other organizations prefer to use weekly messages over a period of a month. Look at the resulting metrics of your email welcome series to determine the best timing for your organization and your audience and make changes accordingly.
- **Set it and forget it.** Online solutions like Convio allow you to create the initial welcome series and automate the rest of the process. This feature saves administrative time and effort. Of course, you can tweak the email message content and images (e.g., if you want to refer to a current event), or add new messages as needed.

After the constituent has received all of the emails in the welcome series, they can be added to your larger list and receive the regular communications sent by your organization.

Don't Waste a Unique Opportunity

You have one chance to make a first impression in your email communications to a new constituent. Take advantage of this opportunity by including information that covers a few topics:

- **Details about your organization's programs.** Your emails should highlight specific programs that will give the constituent a better understanding of your work. Include information that you wouldn't normally add to email newsletters. This can be a great way to make sure that new constituents learn about the organization before they are placed into the ongoing message stream. Show them the value in being a supporter, and remember, immediately after registration is when they're most likely to take a second action — like donating.

- **Information about upcoming events.** Mentioning upcoming events will give new constituents a chance to interact with your organization offline. By encouraging both offline and online interactions early in the relationship, you will likely increase new constituents' overall level of interest and involvement.
- **Other ways to engage with your organization.** Tell the newcomer about the numerous ways he or she can become involved with your organization. Place the emphasis on education, rather than asks.

Real Results

With assistance from Firefly Partners, Millennium Promise, a nonprofit organization that aims to help achieve the Millennium Development Goals in Africa by 2015, created a three-part email welcome series in October 2008. The series of visually appealing emails was staggered, with emails distributed weekly over a three week period.

The first email in the series thanked the constituent for joining Millennium Promise and detailed some of the organization's broad goals in the fight against extreme poverty. The second email message provided more details about specific organizational programs in sub-Saharan Africa to demonstrate to the reader that the scope of the organization's initiatives had an impact worldwide. The third and final email in the series focused on various partners of Millennium Promise, including both private and educational partners. The idea was to show how individuals within the private community are helping Millennium Promise, and hope that they would inspire the new constituent to join the effort.

Open rates of the combined messages sent during the final quarter of 2008 were 24%. Of the people who were added to the email welcome series, 27% opened all three messages. The soft ask at the bottom of each email (a small donation button, not an outright ask) yielded a 2% donation rate.

Millennium Promise will continue to use the email welcome series to ensure that constituents feel a part of the organization from the early stages of their relationship, and to keep the organization's name and mission top of mind in the new constituent's inbox.

Get Started Now

Firefly Partners can help you create an email welcome series for your organization by mixing their years of experience with a healthy dose of fun and innovation. They offer top notch services at an affordable price to small and mid-sized nonprofits.

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About Convio

Convio is the leading provider of on-demand constituent relationship management (CRM) software and services that give nonprofit organizations a better way to inspire and mobilize people to support their organization. The company's online marketing suite offers integrated software for fundraising, advocacy, events, email marketing and web content management, and its Common Ground™ CRM system helps organizations efficiently track and manage all interactions with supporters. All Convio products are delivered through the Software-as-a-Service (SaaS) model and are backed by a portfolio of best-in-class consulting and support services and a network of partners who provide value-added services and applications focused on the unique needs of nonprofit organizations.

About Firefly Partners

Firefly Partners is a small but mighty consulting company. They mix their years of experience with a healthy dose of fun and innovation to help small to mid-sized nonprofits experience online success. The Firefly team strives to provide top notch services to your agency at an affordable price. They're up on the latest trends in social networking and technology tools, and they can help you bring them to your supporters without breaking the bank. Let them bring their expertise to the table and help you find the right combination of projects and services to help you reach your goals.



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