nonprofit TECH SHOP

Nonprofit Guide
to Nurturing Donors
In Hubspot

The ultimate guide to keeping up with your community using HubSpot's high-powered personalization tools and automations

Fostering Relationships:
The Heart of Nonprofit Marketing

Your donor community is the backbone of your cause. Their contributions enable you to do the good that your organization is built around. Sure, they give, but they're not your ATM. Your donors are people first – compassionate, motivated, generous individuals who are inspired by your cause.

Speaking to the humanity of your audience is the key to achieving sustainable donation flow and creating a community around the good that you do. With HubSpot's customizable data and targeting tools, you can show your donors that you see them as valuable individual supporters, thank them for their unique contributions, and establish bonds that last a lifetime.

Build 1-to-1 Bonds without the 1-to-1 Time Commitment

We know the truth about nonprofits. Doing good is a nitty-gritty, unglamorous process; it's not all shaking hands, kissing babies, and saving puppies. Many organizations are lean, scrappy, and bare-bones. Everyone wears a tall stack of hats, and there is not always funding to add headcount to your development team.

> Creating high-touch, personalized campaigns is a must for organizations trying to secure sustainable growth with finite staff time.

Donors generally take a bit of convincing, rarely giving on the first day they discover your cause. But getting in front of potential donors takes time and assets, and creating content consistently and getting it in front of the right people at the right time to inspire a donation.

Sound familiar?

HubSpot hears you and answers with highly personalized automation that makes nurturing relationships push-button simple without sacrificing the humanity in your outreach. We're talking about more than just putting a donor's first name in the email body. With HubSpot automated nurtures, you can:

≫ Tailor messaging to a donor's last gift amount or when they last contributed

≫ Connect donors to updates relevant to their specific interests within your organization

≫ Speak directly to what motivates your donors with highly effective calls to action

Ready to rethink your donor relationships? Read on to understand how HubSpot helps you deepen connections with less effort

One Hub - *Tons of Tools*

Unlike other aspects of nonprofit success that require layers of tech tools, nurturing your donor relationships can be accomplished in a single tool - HubSpot Marketing Hub. Naturally, having all of your operations integrated with HubSpot is a huge help when it comes to keeping your donor data straight. HubSpot's Operations Hub, Sales Hub can certainly help with that. But if you're looking for a single solution for donor nurturing and don't want to dive into other Hubs, **Marketing Hub Pro is the way to go**.

And this is one situation where a lesser level of Marketing Hub probably won't cut it for your cause.

	Recommended **Marketing Hub Pro** 40% Off for Nonprofits	**Marketing Hub Starter** 40% Off for Nonprofits	**HubSpot Free** Always Free for All
Omni-Channel Marketing Automation	✅	❌	❌
SEO Recommendations & Optimization	✅	❌	❌
Social Media Integrations	✅	❌	❌
Campaign Reporting	✅	❌	❌
Dynamic Personalization	✅	❌	❌
Calculated Properties	✅	❌	❌
Record Customization	✅	❌	❌

You Could Go Lower, But...

Optimizing for Marketing Hub Starter has its perks, but HubSpot's automation capabilities are the secret to freeing up your team and taking donor relationships to the next level. If you'd rather manually manage every email you send or manually assess who should receive which messaging, the Starter Hub is a safe bet. But if you want to build repeatable-yet-personalized communication plans that launch based on donor behaviors, there's no question: go Pro.

But I Can Already Automate in a Separate System...

Sure, other systems like MailChimp and Constant Contact offer cursory automations that give you a bit of flexibility. HubSpot, however, is a CRM built for marketing automation. The unparalleled segmentation and multi-layer, omni-channel automations take your team into uncharted realms of automated donor nurturing. It's not only easier to condition contacts in HubSpot than other platforms, but it's far more powerful.

> When you're ready to segment more, further personalize the donor journey, do less manual work, expand your marketing insights and act on them instantly - all in one platform, it's time to get Marketing Hub Pro.

Lists

| | | Import | Create list |

Contact lists library (492)   Company lists library (5)   Unused Contact lists (276)

All lists | Folders | Search lists | Filter by: All creators ▾ All types ▾

	NAME	SIZE	TYPE	LAST UPDATED (GMT+1)	CREATOR	FOLDER	USED IN
☐	Member	7	Static	Jul 10, 2019 4:51 PM	Deactivated User	Demo	116
☐	Disengaged Donors	23,314	Active	Apr 29, 2016 2:27 AM	Alnoor Pirani		92
☐	Engaged Donors	1,588	Static	Apr 25, 2019 4:25 PM	Deactivated User		82
☐	Ticket Purchasers	316	Static	Apr 25, 2019 4:28 PM	Deactivated User		37
☐	Web Forms	4	Active	Feb 3, 2016 6:49 PM	Dhanashree Shah		27
☐	Subscribers	136	Active	Jul 10, 2019 4:51 PM		X-Rite Master List	26

What are *Custom Properties?*

HubSpot comes with plenty of pre-built properties for you to populate with donor data like names, addresses, etc. Where your personalization power really kicks in, though, is with custom properties. They allow you to build out your own information architecture exactly as you want it: create fields to keep track of any detail you can imagine, and then use those custom fields for just about everything.

Types of Custom Properties

You can easily set up the type of properties you need to not only keep track of donor data, but condition your workflows. Pick from different formats, including:

≫ Single-line text	≫ Dropdown
≫ Multi-line text	≫ Date picker
≫ Single checkbox	≫ File select
≫ Multi checkbox	≫ Calculated properties
≫ Radio select	≫ Scoring properties

How to Use Custom Properties

Custom properties give you the freedom to catalog any information you want. They also open you up to a world of automated possibilities. For just a sampling of how custom properties can be used, try these ideas:

≫ Establish your data framework for reporting, forecasting, and campaign planning.

≫ Based on the value of one property, you can set the value of another.

≫ Use custom properties as the trigger for a workflow.

≫ Inputting one custom properties can initiate an update for a separate property.

≫ Create properties that are solely used for segmentation.

⟫ Allow custom properties to influence which branch of an if-then sequence donors experience.

⟫ Input additional donor information like their birthday or t-shirt size to customize outreach.

⟫ Take donor behavior on your site - like visiting a certain information page multiple times - and automatically check a box on their profile to indicate their interests.

⟫ Assign a score to your contacts based on how many times they donate each year or how much they donate annually.

How They Look in HubSpot

Create a new property   ✕

Label

Donor High Interest Campaign

Internal name   ⓘ

donor_high_interest_campaign

Description   Optional

The campaign this donor is most interested in

Group

Company Information   ▼

Field type

Single-line text   ▼

Search   🔍

Number
Radio select

20 Nurture Campaign Concepts *Powered by HubSpot*

The more we feel taken care of, the more we want to take care of others. So, how do you use your marketing to make donors feel taken care of? The answer is deep segmentation and campaigns built around behavior. You can use your messaging to show donors that you remember what they like, when and why they give, and how helpful they've been to achieving your goals as an organization.

Here are some automated campaign ideas you can immediately implement with custom properties:

Custom Property: Date of Last Donation

1.   **Based on Who Just Donated –** Exclude people who recently contributed from your regularly scheduled appeals. Someone who donated yesterday may not want to receive another request for cash today.

2.   **Based on Who Recently Donated –** Send messages to people who have contributed since a checkpoint. You can show them what their contributions have helped you do in the meantime.

3.   **Based on Who Hasn't Donated in a While –** Target people who haven't donated in a specific time frame. Reel them back in with goals, what's happened since their last contribution, and other appeals.

4.   **Based on Who Has Never Donated –** Focus on people who are following your cause but haven't contributed yet. This is a great strategy for volunteer appeals and advertising other ways to get involved.

5.   **Based on Specific-Date Donations –** Does a donor have a history of making contributions on a consistent basis or on the same date every year? Use that to your advantage with prompts to continue the tradition.

Search 🔍

☐ LYBUNT

☑ SYBUNT

☑ Net New
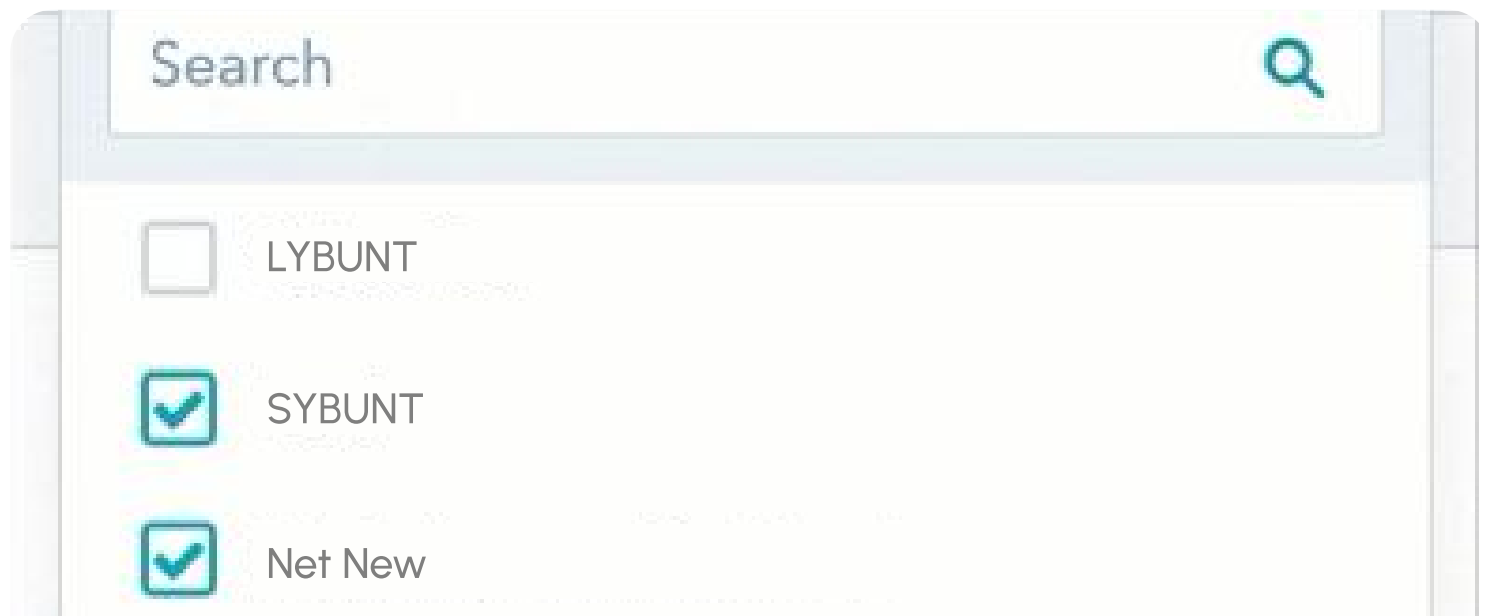
Custom Property: Amount of Last Donation

1. **Send Postal.io Gifts -** When contributors hit certain milestones, automatically send them a thank-you gift using integrations like Postal.io, which offers an array of exciting and affordable gifts.

2. **Acknowledge Big Gifts -** Send an entirely different message to big contributors about what their money is doing for the cause. What $25 might do is vastly different than what a $25,000 donation does.

3. **Push to Targets -** Use year-to-date donation amounts to let your patrons know how much more they need to give to hit a huge milestone. Seeing how close they are to a target can inspire giving.

4. **Show Individual Impact -** Create campaigns targeted to donors in different tiers. Demonstrate what their contribution amount allowed you to do for your cause.

5. **Promote Corporate Match -** Double your impact by sending out a message that donors can forward to their bosses encouraging them to match a recent contribution, or reach out to company heads directly when possible. Include the amount an employee donated and an easy CTA to give.

Custom Property: High-Value Donors

1. **Congratulate Big Givers -** Use scoring and donation data to compile a list of your top-tier donors. Acknowledge their generosity, target them with goal-oriented campaigns, and pay special attention to keeping them happy.

2. **Reward Regular Givers -** Even in small amounts, every donation counts. Celebrate the folks who give monthly, quarterly, or annually as sustainers that keep your cause moving.

3. **Acknowledge Loyalty -** Donors who have been with you for a long time are an asset to your cause. Segment them into a list that gets "Remember When" and "How Far We've Come" communications that use nostalgia and founding-donor pride to elicit donations.

4. **Give Groups Props -** Corporate match programs or group donors are a great way to get a big boost in your donations. Keep track of businesses or other groups that donate together, tailor messaging to elicit their support again, and encourage them to exceed previous contribution goals.

5. **Shoutout Your Advocates -** Are you keeping track of who referred a new donor? If you are, you can segment the people who inspire the most giving and send them a media pack to make sharing your cause even easier.

Bringing It *All Together*

Are you electrified by the potential of the Marketing Hub tools yet? There are an abundance of options for how to apply custom properties to your organization's marketing approach. To make it even more real for you, let us ground this discussion in some real-world examples:

Putting Custom Properties *Into Context*

Your specific use case for custom properties may vary from other organizations, but seeing success stories can show you what's possible. So let's take one of our client's, Save the Chimps, as an example.

Save the Chimps has web pages set up for each of the chimpanzees at their rescue. These pages invite viewers to get to know each animal and symbolically adopt them. In HubSpot, we use custom multi checkbox properties to indicate when a patron is specifically interested in certain chimps over the others. If that patron visits the same chimp's page more than once, a checkbox of that chimp's name will be checked in their contact profile. Then, based on which boxes are checked, the patron will be added to segmented lists that disseminate content about their chimp of choice. The result? More compelling donation appeals tailored to what their donors are interested in.

Here's a Segmentation Idea You Can *Create On Your Own*

For your end of year push, create a calculated property that automatically evaluates how much people have given during the year and then calculates what 10% of that would be. Then, add that field to your annual end-of-year outreach, asking people to give 10% of what they've already contributed this year. It will create a final year-end incentive proportional to a donor's previous contributions. To make it even more personal, you can have the messaging include where that puts their total donations for the year. Here's what it might look like in an email:

> "If you can give just $19 more, you will reach a grand total of $509 for the year - putting you in our Elite tier of donors and unlocking exclusive access to our events and programming!"

Find Us Where *Automation and Human Connections Intersect*

Automation often gets a bad rap for taking the human touch out of marketing. But your outreach doesn't have to be as robotic as the competition! Thanks to HubSpot, you don't have to choose between efficiency and empathy. With Marketing Hub Pro you can get the best of both worlds.

We've helped dozens of nonprofits get into a donor-nurturing rhythm with Marketing Hub Pro and we can do the same for you with:

» custom-designed webhooks

» personalized HubSpot build outs

» workflow mapping and optimization

» custom property creation and coordination

» unique, automated campaign design

» conversational content creation

» donor donation and behavior analysis

» custom reporting and forecasting

Ready to nurture your donors with unprecedented automation? Let's talk!

Constituent Engagement

Online & Offline Marketing

Systems Integration

CMS Web Design

Constituent Relationship Management

Process Optimization