

DONOR ENGAGEMENT

Refining Communications via Email Marketing Tools



Introduction & Learning Objective

Meet your Trainer...

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Donor Engagement

EveryAction



Agenda

Agenda

1. Overview of Targeted Email
2. Overview of Triggered Email
3. Creating and Sending Emails
4. Q&A

Targeted Email Overview

Targeted Email Overview



Segment your audience for better deliverability



Create dynamic content using merge fields



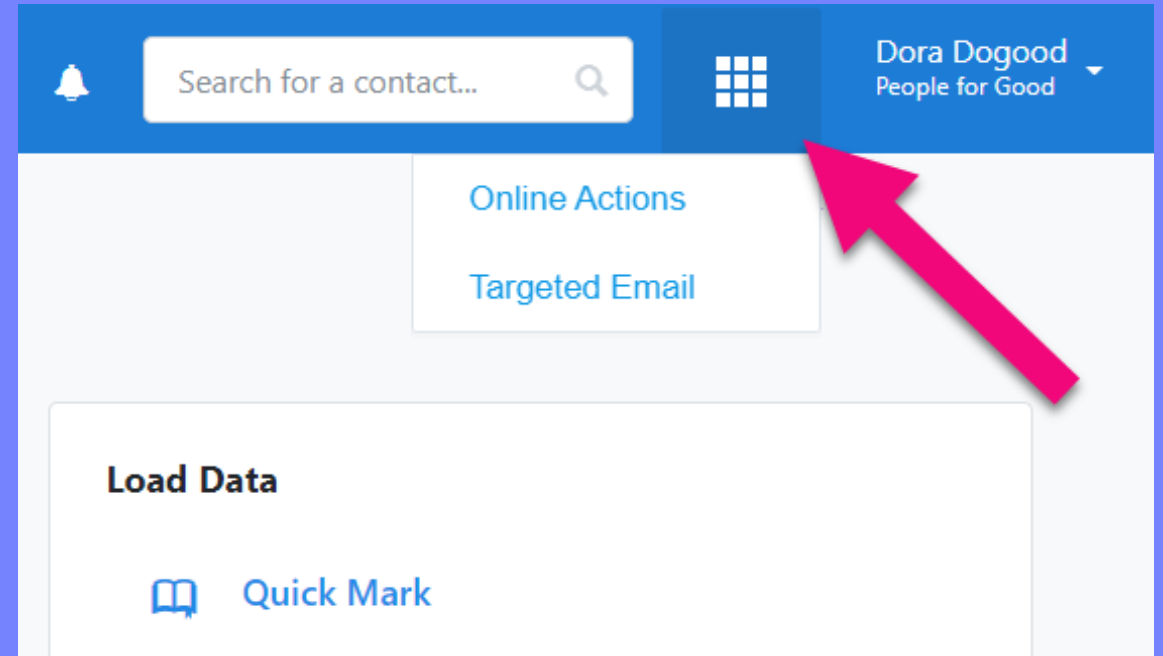
Maintain a consistent look and feel with Drag & Drop templates or using the Classic editor's themes and reusables



And make contributions or action items as easy as one-click using SmartLinks

Getting Started with Targeted Email

You can open **Targeted Email** from the Sidebar, from the Main Menu under Digital Engagement, Targeted Email, or from the waffle icon next to your name at the top right corner.



Understanding the Dashboard

Once you open Targeted Email, you'll see a dashboard that will give you a snapshot of your email program including:



Your Email Performance from the last 30 days, including Opens, Clicks, Amount Raised, Bounces, and Unsubscribes:

Beneath each number or percentage, you will see your previous month's numbers, making it easy to see whether your email program is improving each month.



Your most recent Draft, Sent, and Pending emails:

Emails from your A/B tests will appear in the pending section of the dashboard.



The option to create a new email, duplicate an earlier email, or create a series using automation

Navigating the Dashboard

The tabs at the top of the page will let you see your:

- **Emails:** listing of all your Sent emails as well as any pending emails, and drafts
- **Triggered Email:** add, edit, or deactivate automated email responses such as subscription confirmations or recurring commitment payment failures
- **Content Library:** add, edit, or deactivate your templates, themes, and reusables

More Tips for using the Targeted Email dashboard:

- View a sent email by clicking on the email name
- Hover over the stat percentages to display the raw number
- Click on the dropdown to the right to see a page with more detailed stats
- You will only see the Amount Raised if the email you sent links to a **Contribution** or **Ticketed Event** form

The screenshot shows the Targeted Email dashboard. At the top, there are navigation tabs: Dashboard, Emails, Triggered Emails, Content Library, and Settings. The user is logged in as Dora Dogood, People for Good. The main section is titled 'Email Performance' and shows five key metrics for the last 30 days: Opens (32.75% ↑, Prev 27.34%), Clicks (14.55% ↑, Prev 12.15%), Amount Raised (\$2785 ↑, Prev \$1570), Bounces (0.7% ↑, Prev 0.65%), and Unsubscribes (1.4% ↑, Prev 1.2%). Below this is a 'Create New Email' button. The dashboard is divided into two main sections: 'Drafts' and 'Sent'. The 'Drafts' section lists three items: 'CA: Action Blast' (Updated by Sam Lyons, Nov 9, 2021 5:10 PM), 'A/B Test' (Updated by Dora Dogood, Nov 4, 2021 6:45 PM), and 'Year-End' (Updated by Brian Rivera, Nov 2, 2021 10:22 AM). The 'Sent' section shows a table of sent emails with columns for Name, Recipients, Opens, Clicks, Conv. Rate, Amt. Raised, Bounce, and Unsub. Two emails are listed: 'Weekly Newsletter' (Sent by Dora Dogood, Dec 29, 2021 5:37 PM) and 'PFG Main Fall Email' (Sent by Javier Gonzalez, September 27, 2021 1:22 PM).

Name	Recipients	Opens	Clicks	Conv. Rate	Amt. Raised	Bounce	Unsub.
Weekly Newsletter	1798	43.0%	12.3%	8.5%	\$1257.00	0.55%	1.2%
PFG Main Fall Email	6,456	34.6%	12.34%	7.5%	\$12,894	6.5%	4.50%

Creating Targeted Emails

With the **Drag and Drop Editor** you can:

- Add video content links and social media links
- Create mobile-responsive layouts and quickly swap out graphic elements as needed
- Create templates to speed-up content creation and ensure consistency across committees or affiliates.

With the **Classic Editor** you can:

- Access HTML source code directly
- Apply customized HTML and CSS styling
- Employ Themes to quickly standardize the look for your emails
- Create and use Reusables.

With **both editors** you can:

- Use Merge Fields to create conditional content
- Create links from your email using query strings that will pre-fill forms or track other information about who is responding to your emails
- Add Smart Links to make it easier for your recipients to donate or act by inserting a link to your online form that will automatically pre-fill using the supporter's personal information from their Fast Action profile.

Email Groups and Email Series



In addition to one-off email messages, you can also create a series of scheduled emails that your supporters can receive (such as a Welcome series). **Email Series are created and tracked using the Automation feature**, which gives you access to branching workflows that help you personalize messages based on recipient responses. Automation includes the same email creation tools available in Targeted Email.



If you have multiple versions of the same message that you want to send to specific segments, you can also create an email group. Email groups help you manage which version of an email your supporter gets and keep you from sending multiple versions to the same person.

Tracking Your Success

1

Email Comparison Report - View and compare email performance results. (If you are looking for Subject Line and From Name columns, try running the Email Test Case Comparison Report.)

2

Email Performance Report - For each email sent in the last 13 months, view all recipients and whether they opened, clicked, converted, bounced, or unsubscribed.

3

Email Test Case Comparison Report - Compare email performance for all variants of an email sent as part of an A/B split test. You can also add columns for From Email, From Name, and Subject Line to this report.

4

Email Links Comparison Report - View and compare click counts for links in your emails and across different emails and variants (A/B tests).

5

Email Address Status Report - View subscription status and confirmation status for emails.

Triggered Email Overview

Triggered Email Overview



Triggered Emails, also known as autoresponders or transactional emails, are emails sent automatically in response to an action taken by the recipient, such as confirming an email subscription or notifying them if their payment to you fails for some reason. You can customize your Triggered Emails with personalized messages based on what you know about the recipient. They are very simple to set up and manage.



This tool is included as part of the **Targeted Email feature.**

Triggered Email Recipients

While Targeted Emails are only sent to supporters who have opted-in to your messages, a **Triggered Email can be sent to anyone, regardless of subscription status**. Because the recipient initiated some sort of action that triggers the autoresponder to send, these messages have a special status under CAN-SPAM and other email laws and can be sent to both subscribed and unsubscribed recipients. They typically have higher open and clickthrough rates than promotional emails.

To avoid violating this special exception rule, Triggered Emails should contain, at most, **limited promotional content**, and it should be clear this isn't the focus of the email.



Automation versus Triggered Emails



Triggered Emails are used to send a single, specific message in response to an event.



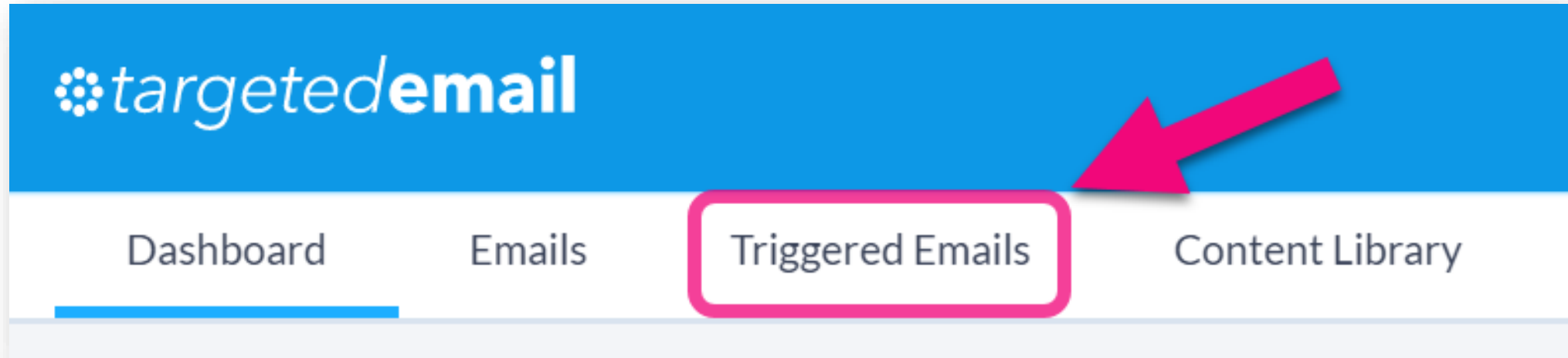
Automations are typically used for things like Welcome Series, re-engagement campaigns, or other outreach efforts where you want to customize your responses based on what you know about your contacts.



You can, however, use both tools together by using Triggered Emails as entry criteria for Automations like the Lapsed Sustainer workflow.


Triggered Email Navigation

You can **open Triggered Emails from the tab** at the top of the **Targeted Email** feature.



Triggered Email Navigation

Triggered Emails



Respond quickly with Triggered Emails

React automatically to supporters with one-time messages based on system events or the actions they take by sending triggered emails, also known as transactional emails or autoresponders. Set up these emails once to:

- Save time by reducing manual sends
- Build strong supporter relationships by sending relevant information that they expect
- Reach your unsubscribed audience while still complying with anti-spam laws

Want to guide supporters through a customized journey? Use Automation to stay on top of your communication by creating personalized paths for supporters.

All	1	Emails				
Published	0	Name	Recipients	Opens	Clicks	Last Sent
Draft	1	Recurring Commitment Failure				
Deactivated	0	<ul style="list-style-type: none">Updated by Dora DogoodSep 11, 2020 5:07 PMType: Recurring Commitment Failure	37	65.00%	43.25%	August 28, 2020

Monitoring Triggered Emails

The Summary section of the Triggered Emails dashboard gives you a quick overview of how many messages have been sent and opened when using any of your triggered emails.

Name	Recipients	Opens	Clicks	Last Sent	
Recurring Commitment Failure ● Updated by Dora Dogood Sep 11, 2020 5:07 PM Type: Recurring Commitment Failure	37	65.00%	47.25%	August 28, 2020	▼

You can also track any of your Triggered Emails in much the same manner as any Targeted Email, including:

- Searching for recipients from the Targeted Emails section of **Create a List**
- Using the Email Performance report to see who is opening and clicking on the message
- Viewing which triggered emails a particular contact received using the Targeted Email section on the contact's details page

Creating and Sending Emails

Getting Started with Targeted Email

When you are ready to begin creating a new email message to your subscribers, you can open **Targeted Email** from the Sidebar.

You can then select:

- **Create New** to begin a new email
- **Create from Existing** to select a previous email to copy. You can then decide whether you want to include the same audience and then add or edit information as you would when you Create New.
- **Create Series with Automation** to create a series of scheduled emails you can send to supporters
- **Create an Email Group** to send multiple versions of an email without sending duplicates to supporters



Basic Features

Once a Targeted Email selection has been made, you will be prompted to:

- Add organizational sender information
- Select between using the Drag and Drop Editor and the Classic Editor
- Select your recipients to build your intended audience
- Calculate your recipients in order to verify that the counts are as expected

Recipient Summary

Last updated Mar 17, 2023 9:35 AM

16,767
Subscribed Emails In Your Audience

Opted Out	842
Duplicates	4
Excludes	0
Bounced	797

Included

Volunteer Group B

Excluded

Contacts In Email Series

Create An Email

New From Existing

Email Name *

Internal use only. Your recipients will not see this name.

Organization Address

Organization Name *	Organization Address 1 *
Organization Address 2	Organization Address 3
Organization City *	State/Province * Select State
Organization Postal Code *	Organization Country United States

Disclaimer

Disclaimer (optional)

Cancel Create

Composing Your Unique Message

Embedded in the composition steps of **Targeted Email**, you will be prompted to:

- Add email deliverability best practices
- Be guided through the step-by-step features to compose the body of your email message
- Add merge fields that pull in information from a contact record and place it in your emails or forms
- Add more personalization with conditional content
- Increase engagement with **Smart Links**
- And track your results using **Query Strings**.

For a detailed tutorial of these steps, please visit the help documentation linked 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

- [Overview: Targeted Email](#)
- [Overview: Triggered Email](#)
- [How to: Create and send Targeted Email](#)
- [How to: Add Smart Links in the Targeted Email Classic Editor](#)



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!

