

Deepening Relationships at Scale



Goal: Regular Communications to Foster Donor Relationships

Foster deeper relationships and increase engagement with major donors (\$3000+ annually) by emailing them about topics of interest throughout the year, outside of fundraising asks.

Challenges with Existing Options for Scaled Personalization

Option 1:

Officers write personalized emails to their own donors

Challenge: emails without a fundraising ask will always take lower priority. Many donor officers may skip the task altogether, others may write at lower quality. Some officers may spend time on emails at the expense of important tasks.

Option 2:

One email is sent to all donors through mail merge

Challenge: while a lower lift on the full team, sending the same template to all donors risks seeming impersonal – or worse, personal but incorrect.

Plan: Finding the Balance

Central emails written by one member of the development team, with critical areas personalized to ensure the email appears to come directly from the officer.

Finding The Balance

Individual Emails *(sent by donor officers)*

Pros

- Highest level of control and personalization

Cons

- Officer time is valuable, and this could be an extra burden
- Emails may be skipped in favor of higher priority projects
- Some officers may be stronger at writing certain kinds of messaging than others

Hybrid Approach



Alignment: messaging connects to organizational goals thanks to centralized collaboration with development and marketing teams



Efficiency: lower lift for donor officers while still allowing them to create a personalized experience for their donors



Quality: lower chance of error by having efficient double-checks on templates and lists; leverages the skills of one strong writer

Mass Email *(sent in one mail merge)*

Pros

- Standardizes messaging from organization
- Lowers amount of time spent

Cons

- Higher risk for errors – which when working with personalized emails can lead to larger consequences
- Donors may be able to sense that the emails are impersonal
- Officers are less involved in the process to provide insight

The Personalization Process



Each email template is adjusted by fundraiser for their own portfolio, focusing just on greeting, phrasing, and tone of voice.

Original Template

Variations

Dear [InSal],

Thank you for your support of the Dallas Symphony! Because of you, we were able to continue making music for audiences at the Meyerson and around North Texas. Now, we are thrilled to share the upcoming full season of music with you and all of the community.

Our 2021/22 season has just been announced, and it will deliver incredible performances - with something for everyone! While the health and safety of our patrons remains of utmost importance, we look forward to returning to the stage with a full complement of musicians.

You can view the upcoming season on our website, [here](#). (Scroll to the bottom of the page to view a digital copy of the 2021/22 season brochure.)

The subscription renewal process begins this week. You should have received an email with instructions on how to renew online, and a season brochure with an invoice has been mailed to you in case you prefer to renew via mail. If you have any questions or would like to renew your subscription over the phone, please let me know and I would be happy to assist you. I can be reached via cell phone, at XXX.XXX.XXXX.

With great appreciation for your support, we are looking forward to sharing another wonderful season of music with you!

All my best,
[Fundraiser]

Thank you for your loyal support of the Dallas Symphony!
With your support, we were able to continue making music for audiences at the Meyerson and around North Texas.

And so the subscription renewal process has also begun.

With great appreciation for your support,
[Fundraiser]

A Team Effort

The Process



Individual Giving Coordinator

Writes email template on topics decided upon with VP of Development

1 hour

Confirms that email aligns with marketing messaging

30 mins

Sends emails centrally through WordFly, which appear to come from each donor officer

30 mins

Total time

2 hours 45 mins



Donor Officers

Make changes to the general template for their own greetings, phrasing, and tone

15 mins

Review recipient list for each email to ensure relevance for all donors

30 mins

Manage replies to their own emails

Ongoing

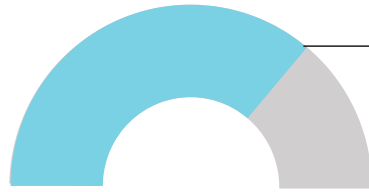
Content: A Peek Behind The Curtain

The goal at DSO was to send emails with information that donors wouldn't otherwise have, but would be enriching. Content included:

- Informing donors about an upcoming Donor Appreciation Month Campaign
- Invitation to a Zoom chat with Music Director, Fabio Luisi
- Invitation to a Zoom chat with Principal Pops Conductor, Jeff Tyzik
- Offer to help patrons renew their subscription, **segmented into two versions**: those who had already renewed their Annual Fund gift and those who had not

Worth The Work

Results



60-70%
average open rate

Donors responded positively to the emails and recognized the personal nature – even if they were unable to register, they expressed gratitude to their officers for thinking of them:

Tanner,

This sounds wonderful, but unfortunately XXXXX is tied up on that day and time. Please let us know of any other times and dates that may work. Thank you for thinking of us!

Thank you, Toni---

We have been in South Carolina, but returned home to Dallas last night. I did register for the Fabio Luisi chat for tomorrow at 5:30pm. Thank you for the invitation. I am looking forward to the opportunity to hear from him! I hope that we can visit soon, as well.

Sincerely,

Benefits



Broader communication: with this system, officers never reach the end of a giving cycle without having had a touchpoint with each of their donors outside of an ask.



Regular reviews: once every 2-4 weeks, officers must review their portfolio through the lens of the next email, which has caused the team to think differently about opportunities for engagement.



Higher engagement: the team found that some donors who typically never interact with the development team and only attend performances started replying to these emails, giving new avenues for building up these relationships.