

Segment Smart for **Year-End Success**

Personalize your year-end appeal to
engage key donor audiences

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Table of Contents

Introduction	1
Donors are not a monolith	4
Planning ahead for year-end	5
Blueprint for year-end success	5
Tailoring your message for key audiences	7
Which segments matter to you?	8
Recurring donors	10
Personalizing your approach	11
Technology supports strategy	13
Year-end planning cheat sheet.....	14



Plan early: A donor-centric approach to year-end

Year-end is a critical time for nonprofits with significant revenue and engagement opportunities at stake - but you probably already know this. While compelling messaging, matching gift offers, and robust technology all contribute to the success of your end-of-year efforts, your fundraising success will also depend on smart segmentation that presents the right 'ask' to the right person at the right time. With only 24 hours in the day and the constraints of limited capacity and budgets, how can you make that happen?










Our best advice: start planning early. Without sufficient planning time, implementing your ideas and strategies won't be possible.

Our second suggestion? Center your plan around your donors—in all their varied glory. To find the right ask and the right placement for your fundraising appeal, you must first understand the person you're asking.










Donors are not a monolith

Planning elements of just one campaign is hard enough, does segmentation matter to justify the additional resources and efforts?

A fundraiser's life would be a lot simpler if your donors were a monolith.

						
	Joined 2 years ago	Joined 2 years ago	Joined 2 years ago	Joined 2 years ago	Joined 2 years ago	Joined 2 years ago
	2 gifts this year	2 gifts this year	2 gifts this year	2 gifts this year	2 gifts this year	2 gifts this year
	Makes 1x gift of \$115	Makes 1x gift of \$115	Makes 1x gift of \$115	Makes 1x gift of \$115	Makes 1x gift of \$115	Makes 1x gift of \$115

But your list is probably a lot more varied, like this...

						
	Joined 2.5 years ago	Joined 15 years ago	Joined 6 years ago	Took 3rd action 1mo ago	Acquired in buy 3mo ago	Social follower
	Gave last year, not this year	HPC \$5k MRC \$250 this year	Monthly donor for 2 years	Gave 2 years ago	Clicked on eNews	Not yet on list
	Makes 1x Gift of \$138	Make 1x Gift of \$50	Make 1x gift of \$50	Make a monthly gift post action	Make 1x gift of \$25	Opt-in via action, make \$5 gift

Smart planning and segmentation strategies are necessary to maximize this critical fundraising season. In this eBook, you'll find practical tactics and tips that you can begin implementing right away.

Planning ahead for year-end

Without sufficient time, thoughtful strategic questions that could shape your approach and testing to improve future campaigns may be sidelined in the rush to execute. Can you still pull off a campaign on a compressed timeline? Absolutely—and sometimes it is necessary. But by starting with the end goal in mind, including your key segments, you can avoid missed opportunities and prevent team burnout.

Blueprint for your year-end success

Let's get started! Here are some milestones to begin preparing for the year-end giving season with your segments in mind...

Timeframe	Main Campaign	Segments
Summer	<ul style="list-style-type: none">• Start setting campaign goals.• Take stock of what worked in the past, and what questions you're trying to answer.• Beyond revenue objectives, how will you measure success?	Do a data check to identify the metrics that will matter for your segments. For example, do you have a lot of entry level donors? Focus on conversion rates. A lot of major donors? Focus on their average gift.
September	<ul style="list-style-type: none">• Work to secure a matching gift that will inspire year-end donors.• Start identifying narrative themes that will drive your campaign.• Finalize a campaign plan and timeline for all deliverables.	Do a tech check on your segmenting capabilities: <ul style="list-style-type: none">• Are you able to use message personalization?• Do your tools have A/B and tracking capabilities in place?• Do you have 'clean' and accessible data to inform segmentation?

Continued on next page...

Timeframe	Main Campaign	Segments
October	<ul style="list-style-type: none"> • Draft copy for all appeals, ads, and supporting materials. • Develop design, video, photography, and other creative assets for campaign. 	<ul style="list-style-type: none"> • Version creative for key segments. • Set personalized ask strings or other segment-specific tactics • Build out contingency plans for anticipated news moments (cough, elections, cough!)
November	Build out all campaign assets in preparation for launch.	Build out segment creative, and ensure sourcing and a/b test tracking are working properly
December	Launch your beautiful campaign!	Monitor testing and segment performance in case you need to boost, adjust or abandon tactics.
January	Evaluate and measure your campaign and document for the future what worked, what didn't, and capture ideas to test in the year ahead.	Examine segment performance specifically to see which tactics moved the needle for key segments and how to apply that learning moving forward.

Tip: Target key donor groups

Avoid over- or under-segmenting your campaign by focusing your planning on 4-6 core segments. The goal is to group supporters based on common levels of engagement, entry points, and target next steps, so you can tailor your tactics to their specific needs. Maximize your personalization efforts by concentrating on segments that are the most distinct from one another. Instead of creating one segment for donors and three for prospects based on different origin campaigns, try using segments like mid-major donors, inactive prospects, activists, entry-level donors, and lapsed donors.

Real-world application: Monitoring performance and ready to pivot

Challenge

In October 2021, Kids in Need of Defense had just finished a huge CRM and systems migration. The end of year effort was going to be their first full-scale campaign. As if that wasn't enough of a challenge, the organization's list and data had been housed in many systems prior to migration and there was no clear indication what response rates could be expected from core segments. We went into year-end knowing that the plan might need to quickly shift based on initial performance

Solution

By setting up audience segments in Engaging Networks and closely following response rates during the Giving Tuesday portion of our campaign, we could see that our audiences were giving, but that they likely needed a higher cadence of appeals to hit fundraising goals. Based on that, we quickly added a flash match and additional appeals to the calendar, a mixture of resends and new messages. Flexibility and quick thinking helped the organization hit its goal by January 1!

Takeaway

Knowing the audience size and historical response rates of your segments can help you right-size goals or push for growth with new tactics and cadence.

Tailoring your message and approach for key audiences

Once you start early with a solid plan, you can dive into the nuts and bolts of smart segmentation and personalization to supercharge your campaign's performance. Different constituent groups have different motivations, giving histories, and engagement levels. In a world where we are accustomed to brands understanding and even anticipating our needs, supporters hold nonprofit causes to similar expectations. It is important to show your supporters that you are paying attention and understand who they are. By carefully considering what resonates with your audiences, you can tailor your messaging to strategic segments, increasing the likelihood of securing donations and deepening relationships.

So, how can you make the most of your limited time to optimize each segment? We'd suggest you focus on three areas:

- **Identifying and understanding** your key segments
- **Personalizing** your campaign for impact
- **Leveraging the technology** you have

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Tip: Focus on high-impact changes

While there are endless ways to optimize your campaign for each segment, it's important to be purposeful. If the only difference between versions is a single sentence in the third paragraph of an appeal, you should ask yourself: Will this change be impactful? Focus on smart, visible tweaks that stand out, such as adjusting gift strings, personalization in subject lines or the email lead, or using unique formatting.

How do you decide which segments matter?

Classic segments are guided by recency, frequency, and monetary value. Other segments that can be helpful are defined by the supporters' behavior or acquisition source. While segmentation interests will vary depending on your mission and how you've grown your audience, the following are a few of the segments we have found most useful for you to consider in your planning:

Last Year's Donors. These donors who gave last year are prime prospects for giving again, especially if they have not yet made a gift this year. If they contributed to your end of year campaign last year, focus on referencing their previous gift, its impact, and the opportunity they have to make a difference this year. Remind them that they have already engaged with your organization and consider their interactions and engagement in planning strategy

Recently Acquired Subscribers.

They've raised their hand to express interest, but have not yet contributed. Year-end is an opportune time to convert them to give. It is helpful to reference the issue that initially brought them in and tailor communications to their interests as you begin to introduce them to the ongoing work of your organization in other areas.

Mid Level or Major Donors.

This audience has indicated their interest and ability to support you at a higher level.



Real-world application: Following instincts to engage and retain

Challenge

With a small but incredibly high-performing email list, Peninsula Open Space Trust (POST) wanted to be especially careful to minimize any spikes in unsubscribes with their prospect audience during the increased cadence of year end efforts.

Solution

Knowing the content that highlighted the human side of nature resonated with its audience, the organization tested the inclusion of a call-out of cultivation content just before the footer. While this increased length and additional links pushed against known best practices, this approach was taken to a test.

Takeaway

Cultivation call-outs brought unsubscribes down by 33%, while the giving response rates were level (and even slightly higher!) for the test segment.

It is important to both express appreciation and approach these donors with the right level of ask to avoid lowballing them. To ensure that they feel valued, look for ways to include them in the inner workings of your organization, share additional insight, and plan ways to recognize them.

Disengaged. End of year can be an optimal time for re-engagement. Try to understand who they are and why they are disengaged. Were they once committed supporters who shifted their priorities? Or was their affinity for your cause tenuous? Try reengaging them with just a few compelling efforts, such as a match offer. But tread lightly to ensure that reengagement of this inactive audience does not impact your deliverability.

Advocates. Don't sleep on this segment! They are engaged 'doers' and tend to also make excellent prospects for giving. This audience can be further subdivided based on their engagement level. Tailor your ask to connect their advocacy actions with the impact through giving, connecting the dots can be a very effective strategy.

Brand New Audiences. It's important to treat new audiences with care, but that does not mean suppressing them from fundraising communications. End of year is when you likely have your post compelling asks during a time when there is a greater propensity for supporting charitable causes. This audience's recency is an excellent predictor of engagement so strike while the iron is hot.

And what about Recurring Donors?

Your recurring donor program deserves special attention and care. Even if they are not a large segment (yet), recurring donors are the backbone of your supporter base, providing a steady and reliable source of income throughout the year. Although you may be wary of exhausting them with excessive fundraising asks, that does not mean that they should be excluded from appeals entirely.

Year-end campaigns are an opportune time to ask them for extra contribution, but it is important to take a measured approach and strike a delicate balance acknowledging their ongoing support. When communicating with monthly donors, express deep and genuine gratitude for their consistent giving. Thread in thank you and impact messages with appeals, showing appreciation for their ongoing support.

A great way to kick off the year-end season is with a heartfelt thank you, especially leading up to Thanksgiving to rally support and remind donors of the impact they are a part of already. This approach not only reinforces the value of their contributions but also builds goodwill, setting a positive tone for any future appeals.

When introducing them to additional giving opportunities, look for ways to align messaging with their commitment and interests. Highlighting the impact of their regular donations and inviting them to make an additional one-time gift can be effective, but without overemphasizing how much they are already giving which can sometimes discourage additional giving and even may trigger them to reconsider how much they are giving. Instead, focus on their unique role and the difference they are making, reinforcing the value of their continued and ongoing support without making them feel pressured.

Tip: Leveraging your data

Once you develop a deep understanding of who your segments are, make sure you know how you'll target them using your data and technology. A few key steps:

- Determine what data, and which platform will be used to create your segments.
- Identify the steps to ensure that your data is consistently up-to-date during your year-end campaign, especially at a time of stretched capacity. Engaging Networks provides a regular sync between your Engaging Networks instance, and your external CRM to ensure data cleanliness.

Personalize those segments for impact

Once you understand your key segments and develop ideas for how to best engage them. Here are some practical steps and insights to put segmentation planning into action for best results.

Right Amount. You never want to ask your major donor for \$25 or a prospect who has never given for \$5,000. The most direct way to boost your segment's performance is to present them with an appropriate ask string. There are a few ways to define your gift string amounts based on their highest previous gift or most recent gift amount. We've seen some promising results with amounts based on the donors second highest gift, so don't be afraid to test and experiment.

Right Message. Tweak the creative and copy to reference supporters' connection and engagement with your mission or, especially if your organization covers a breadth of issues, the subject that you know will resonate with them best. For example, when engaging monthly donors, lead with a thank you for their ongoing support and gently invite them to make a one-time additional gift when it will be matched. For recently acquired supporters, reference the campaign that brought them in and reinforce the importance of financial support to keep that work going.

Right Ask. The fundraising offer itself can be a powerful way to tailor your campaign to what will resonate with a supporter. For non-donors, offer a special match for anyone who makes their first gift through the campaign and motivates them with a goal. For mid or major donor segments, engage them in the strategy of your campaign, asking a pool of these donors to contribute smaller gifts toward a matching fund, knowing that their gift will engage and inspire other new donors to give.

Right Timing. Consider the cadence and timing that might make the most sense for your segments. Some audiences might need a lighter touch while others are ready to contribute. For monthly donors, while it is not advisable to exclude them from your entire campaign, consider the best timing for sending them a third or less of your planned appeals. Similarly, don't exclude your brand new audiences from the campaign. Many nonprofits worry (understandably!) about cultivating their new names properly. But many times, a person's first few weeks on a list are the prime moment when they're most inspired. Test including new list joins in at least some of the year-end appeals.

Real-world application: Right amount, right ask

During the 2023 year-end season, American Technion Society (ATS) wanted to use the “next suggested gift” functionality within Engaging Networks to boost average gift and total revenue from email appeals, particularly among new donors. Two challenges were identified. Many donors have contributed offline or through a previous system and the organization made a strategic decision not to import giving data from other platforms. ATS also wanted all gift strings to include amounts with variants of \$18. This functionality was not natively built into suggested gifts functionality and required a work-around.

To work around these considerations while still leveraging the next suggested gift tool, ATS synced each donor’s highest previous contribution from an external database into a constituent data field and created several donor profiles based on giving ranges for non-donors, donors giving \$1-\$99, \$100-\$250, and so forth. Using these profiles, ATS developed conditional content for their donation page with customized gift strings at appropriate levels that also included amounts with variants of \$18. These gift strings were incorporated into campaign links across all their emails.

These painstaking efforts paid off. ATS saw a 9% year-over-year increase in revenue and a 63% increase in the number of gifts. But the real win was in converting new donors with a 62% revenue increase and a **220% increase in the number of gifts.**

Get personal with your appeals

For each of these key segments and more, remember you have multiple places where you can increase relevance, eliminate friction in the giving process, and ask for the right amount. Don't overlook additional places where you can optimize segments' performance:

Broadcast email sends have a wide range of functionality to assist in all of your testing & optimization goals, including...

- Content versioning with conditional content
- Next suggested gift inserts
- A/B testing
- Send time optimization
- Send prioritization
- Audience filters – automation suppressions & inclusions, seed lists, and segments!

Just like broadcast sends, Engaging Networks' donation pages are full of ways to test and optimize your way into peak year-end giving, like...

- Next suggested gift
- Conditional content
- A/B testing
- Upsell pop-up lightboxes
- Fee cover

Leverage the technology you have at your disposal to maximize results.

Robust technology supports strategy

While a more tailored approach to your campaign strategy can be very advantageous, putting those plans into action can present challenges. Make sure you leverage the technology you have and don't miss out on ways it can support your strategy!

We encourage you to brush up on your technology's core functionalities. Engaging Networks offers a variety of ways to pull data about your audience's recent behavior from your CRM, build status audiences based on past giving and engagement history, and personalize emails, donation pages and suppression lists for each segment.

Fundraising enablement providers regularly develop and release new functionalities to optimize offerings. Year-end is a great time to explore those tools and leverage what you already have access to at your fingertips. For example, Engaging Networks' Segments feature makes it easier to target segments. Users have access to an expanded list of data categories to include any audience, including sub-filters, resulting in a more powerful tool than previously available.

The Segments tool has an incredibly user-friendly interface, with both visual drag-and-drop as well as a more standard display option available from launch.

You've got this!

Planning a major campaign with a lot at stake for your organization may feel daunting, but getting started early will allow you time and space to think about the big picture, align with stakeholders across the organization, be strategic about how you approach your key audience segments, get your technology and data ready, and prepare contingency plans so that you are not caught off guard.

Our advice to all you brave nonprofit professionals is to look back for lessons of what worked in the past, assess where you are today, and use your year-end campaign as a testing ground to innovate and put new ideas to the test.

At some point you may feel overwhelmed or discouraged. In those moments, focus on your organization's mission and how your efforts are advancing an important cause and improving someone's well-being. This is the why behind the work we do for social good and it will help you get through this vital time.

Cheat-sheet for your **year-end planning**

You are busy and we want to support you in your year-end planning efforts to help advance social good and the mission of your organization. Here your quick take-aways:

**Start early:**

Give yourself plenty of time to plan your year-end campaign. Getting a head start means less stress (more sleep!) and more opportunities to fine-tune your strategy.

**Think big picture:**

Consider how your year-end campaign fits into your overall fundraising strategy and cultivates your relationship with core audiences. During this time of year you can gain important insights to inform your future efforts and fuel growth.

**Know your audiences:**

Tailor your messaging and approach to different donor and constituent segments. Look for ways to connect and understand what's important to them so that you can inspire continued generosity and growth.

**Leverage technology & data:**

Ensure your tools and data are configured and ready to support your strategy. The right tech setup can make a big difference in how effectively you reach and engage your supporters.

**Thank and appreciate:**

Express genuine gratitude to your supporters, they fuel your mission. This is especially true for your monthly donors who are among the most loyal and committed to the cause. A heartfelt thank you can go a long way in strengthening relationships.

**Prepare for the unexpected:**

Have contingency plans in place to manage unexpected events or tech hiccups. Preparation will help you stay on track and respond quickly when needed.

Meet the minds



Rachel Allison (she/her)
Principal & Co-Founder - Fresh Eyes Digital

For over 20 years, Rachel has helped nonprofits like the ACLU, 350.org, Fountain House, The Marfan Foundation, and many more build innovative and successful digital programs. Bringing together decades of fundraising experience, a deep knowledge of data-driven strategy, and experience as a brand strategist, Rachel helps organizations leverage cutting-edge digital technology and strategy in order to raise more money and build more powerful supporter relationships.



Ilana Schreiber (they/them)
Data and Analytics Consultant - Fresh Eyes Digital

Ilana has spent the past six years working with nonprofits on digital fundraising and marketing with a focus on data and analytics and a passion for systems integrations and migrations. Prior to joining Fresh Eyes Digital, Ilana worked in-house at organizations specializing in reproductive justice and fighting sexual violence, where they first discovered their love for the combination of technology and fundraising.



Ashley Hansen (she/her)
Business Development Director - Engaging Networks

Ashley Hansen is a former nonprofit employee, turned nonprofit advocate, donor, board member and volunteer. She has spent her entire career working for and with nonprofit organizations. As Director of Business Development, Ashley introduces nonprofits the value of using Engaging Networks and an integrated digital fundraising platform.

About us

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**CREATIVE MARKETING AND
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Fresh Eyes Digital is an online fundraising and digital marketing firm serving the nonprofit sector.

Nonprofits come to us for two big reasons: to acquire and inspire digital audiences, and to convert those audiences into loyal and lifelong donors. Led by industry veterans Jenn Lejano and

Rachel Allison, Fresh Eyes Digital delivers ongoing strategic guidance, creative campaign development, email marketing, fundraising and social media content development, advertising and lead generation, and reporting and analysis. Our latest offerings also include production and implementation, design and visual support, solution selection and assessment, as well as migration and systems optimization.

We work collaboratively with our clients, becoming a valued part of the team helping to meet and exceed each client's digital marketing and fundraising goals.

Fresh Eyes Digital has been an Engaging Networks partner since 2021, and as of September 2024 are a full-service partner accredited in Account Services, Design & Development, Implementation Strategy, and Technology Development.

[Click here to learn more.](#)

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Engaging Networks helps nonprofits maximize their impact through a suite of world-class online fundraising and advocacy tools. Nonprofits of every size and cause—from human rights to disaster relief—use our platform to raise money,

engage their communities, and advance their missions. For over 20 years, we've powered tens of millions of donations from over 190 countries and raised over \$2 billion for social good. Engaging Networks is a flexible, completely customizable and innovative software platform for nonprofits. Request a demo to learn more about how we can help your organization. [Click here to learn more.](#)