

# Beginners Guide to Email Marketing with Marketing Cloud Engagement for Nonprofits



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# Introduction

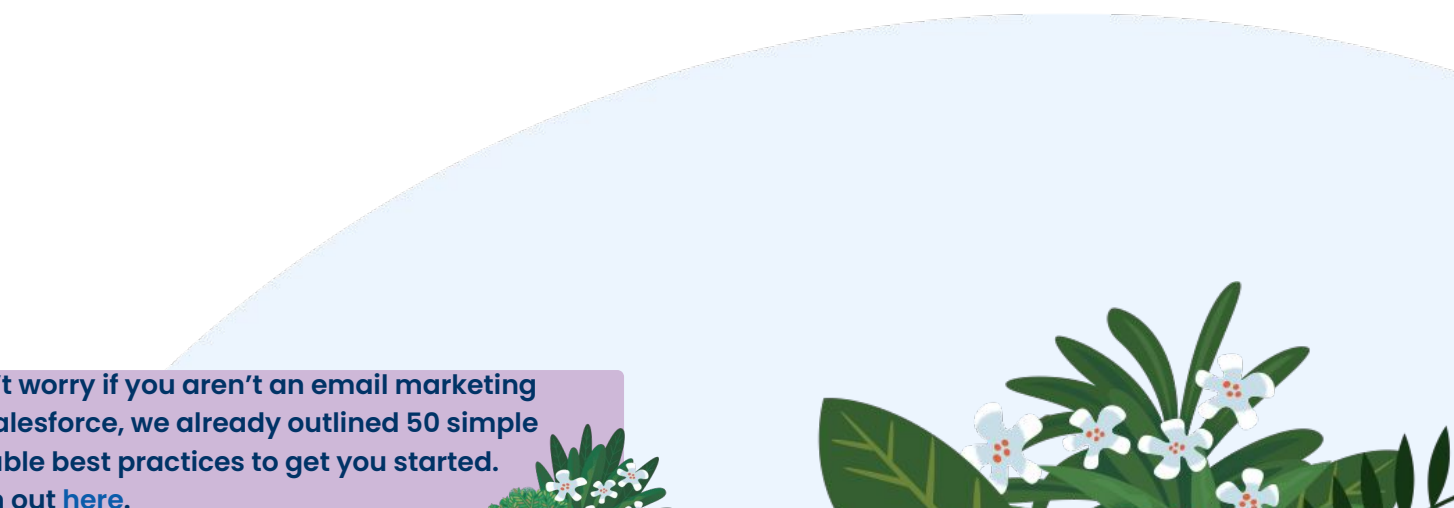
## You've got Marketing Cloud Engagement for Nonprofits. Now what?

Implementing a new Salesforce product can be equally exciting, and even overwhelming. The positive thing is, we've got your back each step of the way.


The purpose of this guide is to equip you with the tools necessary to build familiarity and confidence with Marketing Cloud Engagement for Nonprofits, specifically email marketing. Technology continues to evolve and we continue to consume information on the go, which means the way in which your organization communicates with its stakeholders is extremely important. But, you already knew because you're here!

This guidebook provides step-by-step guidance to get you ready to not only send your first email but to make sure it's successful. Make sure you also take advantage of the included planning templates and additional resources to support you through your Marketing Cloud journey.

Told ya, we've got your back all the way through. Together, let's turn down the nerves and amplify the excitement. Let's dive in!



**Pro tip:** Don't worry if you aren't an email marketing expert. At Salesforce, we already outlined 50 simple and applicable best practices to get you started. Check them out [here](#).



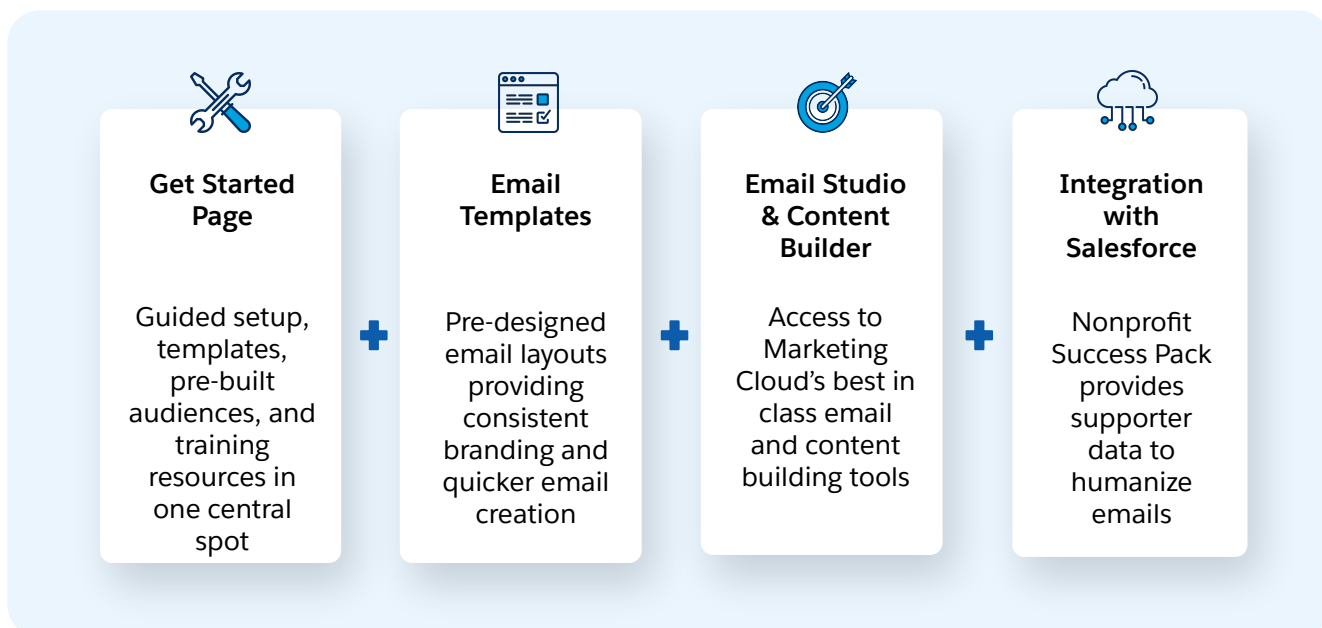
# Marketing Cloud Engagement for Nonprofits Overview

Marketing Cloud is the platform for delivering relevant, personalized content experiences across channels and devices – enabling marketers to deliver the right message at the right time throughout all phases of the relationship. **Marketing Cloud Engagement for Nonprofits** is a purpose-built marketing solution designed to help mid-sized nonprofits quickly and efficiently engage supporters, and create more deeply personalized stakeholder experiences. It offers easy to use tools and templates to help you create and scale personalized engagement out-of-the-box.

Email is by far the most popular and effective way to engage supporters. But at scale, emails can lose the things that make them personal, human, and authentic. Marketing automation tools help you automate the manual processes of creating emails, personalizing them, and sending them out to thousands of contacts.

With Marketing Cloud Engagement for Nonprofits, you can communicate with staff, donors, community members, and other stakeholders in a fast, personal, and effective way.

## What's Included with Marketing Cloud Engagement for Nonprofits?



# Marketing Cloud Engagement for Nonprofits

## Common Definitions

### Why this is important:

Adopting new products comes with lots of new things to learn. Let's begin your learning journey by identifying the critical Marketing Cloud concepts and definitions you need to understand.

*Note:* this is not an exhaustive list; for more information, go to the official [Marketing Cloud Glossary](#).

| Term                        | Definition  | Benefit  |
|-----------------------------|---|--|
| <b>A/B testing</b>          | A method of email testing in which you send two versions of your communication to two test audiences.                   | Tracks which version receives either the highest unique open rate or highest click-through rate. |
| <b>All Subscribers List</b> | A collection of all of your email subscribers who either received an email from you or were added to a subscriber list. | Serves as your “source of truth” for email subscribers.  |
| <b>Contact</b>              | Individuals added to any contact database within your Marketing Cloud instance.   | You can track contacts whom you've never sent email, but you might contact in the future.        |
| <b>Content Builder</b>      | A tool that leads you through the process of creating content for template-based emails.                                | Give you an easy-to-use, drag and drop interface to create professional looking email messages.  |
| <b>Data Extension</b>       | A table with fields of information about your subscribers.  | You can use the data to send personalized emails to a subset of subscribers.                     |
| <b>Email marketing</b>      | The strategy of sending email communication to a group of stakeholders or prospects.                                    | Improve engagement with supporters, increase donations, or share your organization's mission.    |
| <b>Email Studio</b>         | An application for marketers to create, target, deliver, track, and manage email marketing programs.                    | Build emails, segment and target your audience, and send with confidence without any coding.     |
| <b>Email templates</b>      | Pre-designed email layouts providing consistent branding and quicker email creation.                                    | Deliver campaigns faster with the included pre-built nonprofit email templates.                  |

# Marketing Cloud Engagement for Nonprofits Common Definitions (continued)

| Term  | Definition  | Benefit  |
|---|---|--|
| <b>Insert attributes</b>                                | Feature in Content Builder that lets you insert any of the attributes in your account (such as subscriber name) into your emails.     | Personalized emails make an email more likely to be opened.  |
| <b>Marketing Cloud</b>                                  | A marketing platform that empowers you to know, personalize, and engage across digital touchpoints (email, web, mobile, social, etc). | You don't have to use the entire suite of products—use only the products that meet your needs!               |
| <b>Marketing Cloud Engagement for Nonprofits</b>        | Marketing Cloud Engagement plus purpose-built tools for nonprofits for faster time to value and increased success.                    | Includes a guided setup, wizards, email templates and embedded training.                                     |
| <b>Response Trend Analysis for an Email Send Report</b> | Pre-built email message framework that allows you to customize and send personalized emails.  | Email templates allow you to get started quickly, without having to build from scratch.                      |
| <b>Segment</b>  | Filtering or grouping of data to build a specific email target audience.  | Helps you personalize your communications so that supporters are receiving relevant email messages.          |
| <b>Subscriber</b>                                       | A person who has opted to receive communications from your organization.  | Allows you to send to people opted in to receive messages via a specific channel, such as email, SMS or MMS. |
| <b>WYSIWYG editor</b>                                   | The “What You See Is What You Get” email editing/creating tool in Content Builder.  | Using a WYSIWYG editor is faster than using HTML coding to build email messages. No code needed!             |

# Your Email Creation Process



## Step 1

Understand Your Tools



## Step 2

Determine Your Goal(s)



## Step 3

Identify Your Call-to-Action



## Step 4

Define Your Segments



## Step 5

Build and Personalize Your Email



## Step 6

Test and Refine



## Step 7

Send and Evaluate



## Step 1

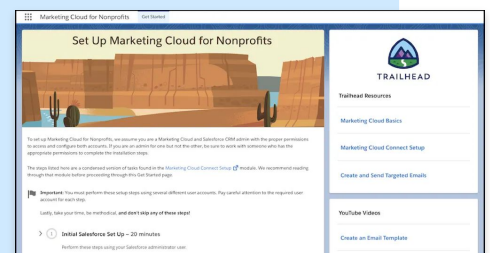
# Understand Your Tools

It can be tempting to skip to the “good part” and just start sending emails using your shiny new Marketing Cloud Engagements for Nonprofits tool, but please resist! Your first step is to make sure you understand the instruments you have at your fingertips, and while you’re doing that right now with this workbook, there is always more to learn.

## Three steps you can take to begin your learning journey.

### 1 Use the Get Started Page

You probably used, or will use, the Get Started page in your Salesforce org for step-by-step instructions on configuring Marketing Cloud and connecting it with Sales Cloud and Nonprofit Success Pack (NPSP). But the Get Started page also gives you links to learning resources you need, like videos, product documentation, and Trailhead. One location for everything you need.



### 2 Join the Trailblazer Community

You are not on this learning journey alone because you have the [Trailblazer Community](#). When you engage with this online community, you get answers, build your skills, and your network. There’s even a group just for [Marketing Cloud Engagement for Nonprofits](#) users.



### 3 Extend Learning with Marketing Cloud Success Center

The perfect place to extend your Marketing Cloud knowledge is through the Salesforce Success Center. Success Center provides expert guidance to help you set up and learn about Salesforce products. No matter where you are on your Salesforce journey or what products you’ve purchased, you can find resources that fit what you need.







## Step 2

# Determine Your Goals

Before you spend time writing and building an email, you will need to determine your goals and metrics. How do you do that? Start by answering a simple question: In an ideal situation, what do you want to happen once your email is sent? Remember, your goals can be big and conceptual, or small and concrete.

### Examples of Small Goals

- Get stakeholders to register for an event
- Teach stakeholders how to complete a standard process (ex: sign up to volunteer)
- Show off a new initiative

### Examples of Big Goals

- Attract more volunteers
- Increase number of donors
- Grow your presence

Once you know what you want to happen, how do you determine if it's actually happening? The next step after determining your goal is to come up with metrics that will help you evaluate whether you've reached success. Let's go through each of those goals, both large and small, and see what "Goal Achieved!" might look like.

### Small Goal Metrics

- 100 people register for your event
- 75% of your stakeholders complete the process correctly in a month
- 30% increase in traffic to your initiative webpage

### Big Goal Metrics

- 40% increase in volunteer orientation sign ups within a week
- 25% increase in donations within a month
- 30% increase in shares and likes on social media in a week

*Hint: Set a timeframe alongside each metric for more effective tracking*

Your goal is your overarching "why" – why are you sending this email? And why should your audience care? The metrics that you set for each goal are the "how" – how will you measure success? How will you know if your email has hit its mark? Once you have both of those pieces in place, you can start planning your email with these outcomes in mind.





## Step 3

# Identify Your Call-to-Action

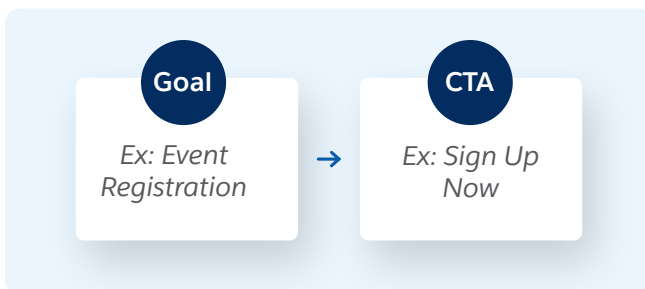
While determining your goals, you decided what you wanted your email to accomplish. Now let's take it one step further and answer another question: What does your audience need to do in order for the email to be successful? You know your goal so let your audience in on it too by sharing a clear call-to-action.

## What is a Call-to-Action?

A call-to-action, or a CTA, is a prompt designed to encourage a desired action. Think of it this way, if the recipient gives your email only a cursory glance, this is the part that you want them to see. While there's no one standard way that a CTA has to look, there are a few common identifying features. Typically CTAs are:

- Distinguished clearly with visual cues, such as buttons or bright colors.
- Hyperlinked to another page with more information and next steps, such as a registration or donation form.
- Creates a sense of urgency.
- Use strong action words.
- Featured prominently within the body of the email.

## Design Your Call-to-Action





# Define Your Segments

We've all gotten emails with recommendations of products to buy, events to attend, or resources that might appeal to us. This is because most organizations spend some time segmenting their audience. When you segment, you're organizing your stakeholders into groups with similar characteristics. For example, you may segment by demographic information, employment history, philanthropic engagements or donations.

## Why Segment?

Segmentation is important because it is the precursor to personalization. An effective segmentation strategy means that you can tailor your communications to that specific group, or segment, which in turn means that your messages will be more effective. Think about it, would you be more likely to open an email that applies specifically to you, or one that is clearly sent to a mass audience?

## How to Segment

Segments will fall into one of these four categories:



### Geographic

- City
- State
- Country



### Demographic

- Industry
- Company Size
- Education



### Psychographic

- Philanthropic Engagement
- Volunteering
- Past Involvement



### Behavioral

- Email Clicks
- Event Attendance

Start with larger segments, then continue to refine based on ongoing interactions. For example, you may start with a specific industry—healthcare—and then split up your healthcare stakeholders into donors and non-donors, and eventually build out segments for various donation levels. Note that you will have crossover amongst your segments, and that's perfectly normal.

**Pro tip:** Marketing Cloud Engagement helps you with your segmentation with the pre-built data extensions based on common nonprofit segmentation criteria.



# Segmentation Criteria Worksheet

| Criteria   | Use Case   |
|--|--|
| <i>Ex: Constituent Type<br/>(Donor, Non-Donor)</i> | <i>For Donors: Share impact report<br/>For Non-Donors: Promote Giving Day, send fundraising event information etc.</i> |
|  |  |
|  |  |
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## Step 5

# Build and Personalize Your Emails

Writing and sending one email to the masses may save you time on the front end, but being intentional about building and personalizing your emails will help you save time in the long run. With Marketing Cloud Engagement, you can seamlessly build emails detailing all the important information you want to share while speaking directly to the receiver.

One more thing! Engagement helps you build emails by providing you with templates based around common nonprofit use cases. Told you we've got you covered!

### Data is the Gift that Keeps Giving

All data you have about your customers can be used to segment and target subscribers with highly relevant messaging. With dynamic content and scripting capabilities, you can send a single email that renders uniquely for millions of subscribers. This [workbook](#) can help you visualize and build constituent journeys.

### Let's Paint A Picture

The Donations Specialist at the nonprofit All Together wants send all donors who share a birthday an email with birthday wishes and thanks for their prior contributions. Additionally, the email will include details about how to access the giving portal. Although this email will be sent to multiple people, each message will be personalized with each donor's name to eliminate the feeling of a generic email.

This is an example of a 1:Few email. The data that is collected in your CRM corresponds to the information on your form pages, allows you to use the data to scale your email communications and send to the necessary people. Marketing Cloud Engagement allows personalization with emails, even if a template is used, so that a personal connection is built with the receiver.

With Content Builder, you can create templates to make your content messaging uniformed.

### Extend Learning with Marketing Cloud Success Center

Our drag-and-drop interface, WYSIWYG editor, and content blocks make it easy to build beautiful emails. Basic, advanced, interactive, and custom blocks are available, as are full HTML capabilities for technical users. Content can be organized using folders and tags and reused across campaigns. It may be useful to learn more about [Marketing Cloud Content Creation](#) to maximize your usage of the tool.





## Step 6

# Test and Refine

So now that you've built out and personalized your email, it is important that as you continue to send emails, you pay attention to the trends and engagement of the receiver. Success, or lack thereof, from one email does not always determine the success, or lack thereof, of future emails. Thinking like a marketing expert can help you improve the overall email experience for both you and your stakeholders.

### Testing, Testing!

A/B and multivariate testing help you determine the most effective messaging and automatically deliver the winning campaign. Built-in AI can select content at open time, optimizing your emails as subscribers engage with the message. Marketing Cloud tracks real-time message performance and subscriber engagement for all sends, so you always know what's working and where you can improve.

### What Should I be Testing?

#### Subject Line

Subject lines grab attention. Try new ones with a little personality!

#### Call to Action

Instead of "click here" as your CTA, use "donate now" or other variations to get the response you need.

#### Time of Day

9am emails never really excite anyone. Noon maybe? 2pm?

#### Content

What's in the body of your email? Switch up the style. Include some cool images.

At Books for Us All, the email marketer Kelsey noticed there had been a dip in responsiveness and engagement from previous donors after they reached their million dollar goal for a previous campaign. For the last few months, email recipients weren't opening their email, and if they were, they weren't engaging with the content. The emails lacked personalization, had no engaging subject line, and would be sent on Friday evenings at 8pm.

Kelsey decided to email previous donors by personalizing the email, which would greet each donor by name in the text. Kelsey also used a new subject line that would catch the reader's attention "Thanks a Million!" Lastly, Kelsey sent the email on Tuesday at 1pm. More email recipients opened their message and engaged with the content which led to Books for Us All receiving a few more donations!





## Step 7

# Send and Evaluate

You've done it! You created outstanding email content to meet your organizational goals and now the final step is to send it off to your stakeholders and evaluate its effectiveness. There are two key Marketing Cloud terms to understand in this final phase, **email deliverability** and **email tracking**.

**Email Deliverability** is the process of ensuring that your email content gets to your subscriber's inbox and not into their Spam or Junk mail boxes. You can't meet your goals if your email messages are not received. Email deliverability metrics are shown in the Email Studio [tracking workspace](#),



Trailhead Module:  
[Email Deliverability Essentials](#)

Your first step towards deliverability success is to head over to [Trailhead](#) and learn the basics of improving and managing your email deliverability.



**Email Tracking** is the collection of data that allows you to view critical elements such as email opens, clicks, undeliverable messages, and other metrics. You can also capture how many emails are forwarded and how many new subscribers each forward generates. This is how you will know if your emails sends are meeting your goals.



Trailhead Unit:  
[Run Reports and Track Results](#)

Email Studio provides a **tracking workspace** where you can view real-time performance of your email sends. Complete the Trailhead unit, "[Run Reports and Track Results](#)", for tips on how to make the most of tracking your email data. You can also watch the "[How to use Email Reports in Marketing Cloud](#)" video training for a deeper dive into reporting options.



**Pro tip:** make email tracking simpler by sorting sends into folders by type, such as test sends, triggered sends, or A/B Testing sends.





# Put it into Action

## Let's build an email together

The Kids are the Future nonprofit organization has accepted 50 new volunteers to their tutoring program. Each new tutor needs to be made aware that they have been accepted and what their next steps are regarding onboarding, how to track hours, and the necessary forms to get started. A separate email needs to be sent to returning volunteers reminding them to complete their checklist items, how to track their hours, and when the first session of the season is.

### Step 1: Understand Your Tools

What tools do you have at your disposal?

*Ex: Marketing Cloud Engagement templates*

### Step 2: Determine Your Goal(s)

What will sending this email achieve?

*Ex: Volunteers will be made aware of their onboarding requirements*

### Step 3: Identify Your Call to Action

What do you want your audience to do?

*Begin Your Onboarding!*

### Step 4: Identify Your Segments

What categories do your recipients fall into?

*Psychographic - new and returning volunteers*

# Put it into Action Cont'd

## Step 5: Build and Personalize Your Emails

What information is going to be shared in this email and with who?

*Next steps regarding onboarding, how to track hours, and the necessary forms to get started.  
Reminder to complete checklist items.*

## Step 6: Test and Refine

Which components of your email are effective?  
Which are not?

*The email wasn't personalized to each recipient*

## Step 7: Send and Evaluate

Send and monitor your results!

# Conclusion

Well look at who we've got here... an email marketer! You have learned about Marketing Cloud Engagement for Nonprofits, the benefits of the platform, and ways that you can use them at your organization.

Engaging your stakeholders takes practice, but now you're equipped with what you need to get started in an effective way! Take one step at a time to build the most intentional emails and follow the trends of your stakeholders. Don't hesitate to modify your approach as you strive for your desired outcomes.

The activities in this guide are designed to provide you with space to practice as many times as you would like in order to craft the best emails. All resources linked in this guide are on the Additional Resources page at the end.



# Resource Summary

[Email Marketing Best Practices](#)

[Marketing Cloud Glossary](#)

[Trailblazer Community](#)

[Marketing Cloud Engagement for Nonprofits](#)

[Segmentation Criteria](#)

[Creating Constituent Journeys Workbook](#)

[Marketing Cloud Content Creation](#)

[Tracking Workspace](#)

[Trailhead Module: Email Deliverability Essentials](#)

[Trailhead Unit: Run Reports and Track Results](#)

[Video: How to use Email Reports in Marketing Cloud](#)