
E-BOOK

Nonprofit guide to omnichannel donor engagement





INTRODUCTION

This is a pivotal time for nonprofit organizations. By putting in-person services and events on pause, COVID-19 changed the way nearly every organization engages its donors, constituents, and beneficiaries. The pandemic necessarily accelerated digital transformation efforts for nonprofits large and small alike.

While organizations may have viewed digital communications as a benefit prior to the pandemic, now digital communications are an essential means of communicating with anyone. Digital communications are fundamental to enabling your organization to deliver its mission and stay connected to the people you serve, and to achieve these goals with efficiency and scale. If you're wondering how your organization can adapt to this acceleration in digital technology, this guide is for you.

In this guidebook, we'll share how nonprofits use digital communications in their fundraising programs to build relationships with supporters at scale.

It's time to build. Are you ready?

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Nonprofit fundraising has changed

These days, we're all spending more time connected to digital communications like SMS, email, and over-the-top (OTT) channels like WhatsApp and Facebook Messenger. We use these channels to connect with friends and family, as well as the businesses and organizations we support.

This trend isn't new. Rather, the pandemic accelerated a shift toward digital engagement and forced businesses and organizations alike to adapt at a rapid pace. With in-person activities on hold, nonprofit programs and services of every type have necessarily become digital activities. In fact, 96% of businesses and organizations say that COVID sped up their digital transformation activities.¹

Unfortunately, this transformation has not reached all organizations or their activities equally, meaning that **many fundraising programs have not kept pace with the speed of digital change in 2020**. Nonprofit supporters have noticed. 92% of donors say that nonprofits need to invest in communications in order to stay relevant.² These donors report that regular updates on channels they use, like email, WhatsApp, and social media inspire them to support the organizations and causes they care about.

To underscore this point, we can look to consumer behavior, where **75% of people say they have rewarded businesses and organizations that communicate with them in the way they prefer**.³ People want to communicate on their preferred channels, to engage in 2-way conversations, and to receive personalized communications from the organizations that contact them.

In partnership with Lawless Research, Twilio surveyed 2,500 consumers in the US, UK, Germany, and Australia to learn what aspects of communications with businesses and organizations are most important to them. The chart below shows the results - note that more than half of respondents said that communicating on their preferred channel is important to them!

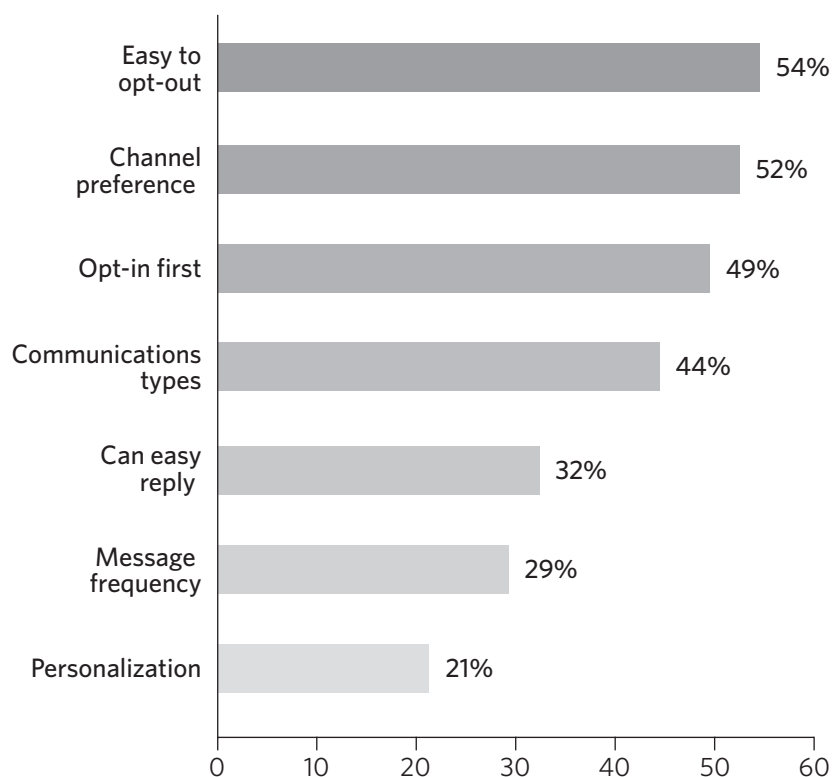
¹ [Twilio COVID-19 Digital Engagement Report](#)

² [2020 Global Trends in Giving Report](#)

³ [Twilio Global Study: Consumer Engagement Best Practices for 2020](#)



Most important aspects of communications to consumers



With such clear communication preferences, you might think that businesses and organizations are doing a good job of communicating with their audiences. Amazingly, the vast majority (94%!) of people say they're annoyed by the communications they receive today. People are tired of getting generic communications on the wrong channel, or getting far too many solicitations, or worse yet, receiving communications without opting in.

So the lesson is simple: when organizations engage people in the way they prefer, they're rewarded, and when organizations fail to do so, people unsubscribe and those organizations lose supporters. Digital engagement is no longer a nice to have, it's an essential part of how nonprofits attract and retain donors, and achieve their missions. And digital engagement provides an opportunity to reach more people, with greater personalization, than is possible at many in-person events and activities.

To understand how you can start building your relationships with donors through digital communications, let's look at the types of communications and channels available.



Types of fundraising communications

Promotional

Promotional communications are those whose primary purpose is to advertise or promote an event, service, or offer. They're the bread and butter of any fundraising campaign, and the types of communications you most likely have in mind when you think of communications from a business or organization. Promotional messages can include:

- Donation solicitations
- Event invitations
- Newsletters
- Program announcements
- Impact updates

Transactional

Transactional communications relate to content that facilitates a transaction or updates your audience about a transaction and engagement with your organization. This could include any of the following:

- Opt-in confirmations
- Donation receipts
- Event reminders
- Follow-up surveys
- Account creations
- Password changes

These communications generally aren't promotional in nature, but are essential to supporting your relationship with your supporters at various stages in your donor journey. That said, it's perfectly normal - and sometimes recommended - to include some content that could be promotional in some of your transactional messages, such as a thank you message in a donation receipt.



Conversational

Conversational communications are those that enable a 2-way engagement between you and your supporters. Whether happening live between two people, asynchronously, or through automation like a bot, conversational communications enable your audience to engage with your organization directly. Conversations could include:

- An inbound or outbound phone call
- Peer text message exchange
- 2-way email thread
- 2-way engagement with an SMS-bot or chatbot.

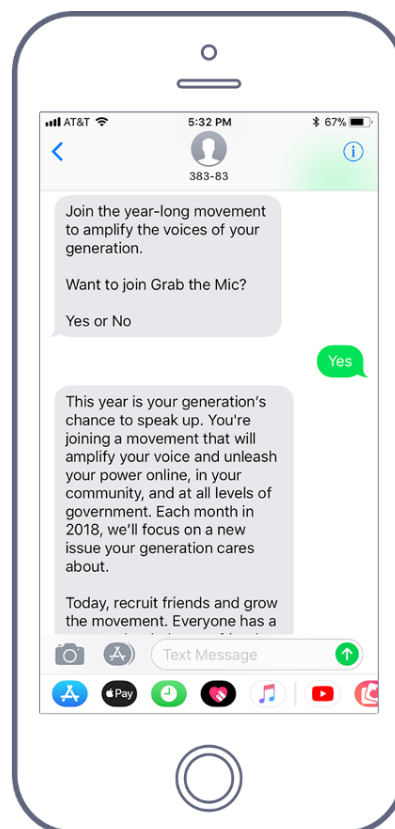


Image: DoSomething.org uses an SMS bot to engage young people in action campaigns.

There are several benefits to utilizing conversational communications as part of your fundraising strategy. Conversations build donor relationships by enabling you or your staff to connect with supporters. In turn, you can be more responsive to donor interests by answering questions about your programs and ways supporters can become involved.

Lastly, conversations are one of the best ways to learn more about your audience. Using modern digital communications, you don't need to respond to every question with a staffer or volunteer. Rather, you can use bots and automation and AI to respond to common queries, save your team time, and reach more people. Then route uncommon questions to your team.



Types of communication channels

Today, there are a multitude of communication channels available, and it seems like every year there's a new channel to learn. Not long ago, digital marketing meant sending email, but now there's SMS (text messaging), over-the-top or OTT channels (Facebook Messenger, WhatsApp, and webchat), and of course voice (telephone calls).

In the table below, we highlight some of the key characteristics to consider about each of these communication channels according to three main categories: engagement, accessibility, and content.

| Channel | Engagement | | | Accessibility | | Content | |
|---------|--|----------------|---------------------------------|---------------|---------------------------------|----------------|------------|
| | Engagement Rates | Time-sensitive | Two-way | Ubiquitous | Connectivity required | Content Length | Rich Media |
| Email | 17% average open rate* 3.3% average click-to-open rate* | Somewhat | Depends on sender configuration | Yes | Internet | Medium/long | Somewhat |
| SMS | 98% average open rate* 4.2% click-to-open rate* | Yes | Depends on number and location | Yes | Internet or carrier network | Short | Yes |
| Voice | 47% answer rate ⁴ | Yes | Yes | Yes | Carrier network, sometimes VoIP | Long | No |
| OTT | >80% open rate | Yes | Yes | Multiple apps | Internet | Short/medium | Yes |

*Data from M&R Benchmarks

⁴State of the Phone call report. Answer rate varies depending on whether the call is coming from a known number. STIR/SHAKEN protocol will enable organizations to build trust back into a channel that has been negatively impacted by robocalls.



Best practices for multichannel donor communications

Now that we've learned what and where we communicate with donors, let's review some best practices that you can employ to engage your supporters in a way that builds trust and stronger relationships, and ultimately more sustained giving.

1. Start with permission

When we asked people what they care about most when communicating with a business or organization, clear opt-in and opt-out preferences were at the top of the list, with 49% and 54% of respondents citing them, respectively. For anyone who's found themselves on a contact list they didn't remember subscribing to (that's all of us), it's easy to understand why opt-in and opt-out are so important - it's annoying to get unwanted communications!

Getting permission serves multiple objectives at once:

- It builds trust with your audience
- It's required by many country, state, and local regulations, as well as carrier industry guidelines
- It helps prevent your communications from getting flagged as spam and negatively impacting your deliverability rate

SMS opt-in: Opt-in methods vary by communication channel. If you're adding SMS to your engagement strategy, there are two common ways to obtain opt-in: SMS-based and non-SMS-based.

For SMS-based opt-in, you provide a phone number for people to text in to. This works well if you're running a campaign, holding an event or telethon, or sharing the option to text in on your website. Keep in mind that opt-ins are campaign- and context-specific, so it's recommended to ask users to text a keyword so that you can associate people with that campaign and ensure that any messages you send in the future are relevant to your audience.



For non-SMS-based opt-in (or opt-in to other communications channels like email), you can use a webform or offer the option to receive updates when someone makes a donation.

It's a good idea to be clear about why you're offering a new channel and set expectations for your audience. What kind of communications will you send? How often will you send messages? Providing this information up front helps to build trust and ensure that the messages you are sending are exactly what people want to receive.

Visit the following resources for more information about compliance and deliverability:

- [Twilio Guide to U.S. SMS Compliance](#)
- [Twilio Global Telco Guidelines](#)
- [Twilio SendGrid Email Deliverability Guide](#)

2. Meet people on the right channel

Using the right channel doesn't necessarily mean using every channel. Instead, focus on learning which channels your audience uses to communicate, which they'd like to use to engage with you, and when they would like to receive communications on those channels.

Keep in mind that channel preferences may change depending on the types of communications you're sending. While email is many people's preferred channel for receiving communications from businesses and organizations, SMS is most preferred when those communications are urgent.

To determine which channels you should use, ask yourself:

- How urgent is the message?
- What type of content am I sending? Does it need to be acted on quickly, or saved for later?
- Do I want my recipient to reply to the message?
- What channels have my supporters opted into?



Then map the answers to these questions to the benefits of each channel:

| Email | SMS | Voice | OTT |
|--|---|---|---|
| Content can be longer | Short (recommended to keep under 160 characters) | Synchronous communication | Global reach |
| May be saved for future reference | Good for urgent communications | Can leave live or recorded message if recipient unavailable | Can be encrypted |
| Can include attachments | Can be delivered without internet connection | May be preferred channel for older donor demographics | Often preferred for conversational communications |
| Often preferred for promotional and transactional communications | Can send multimedia content with MMS | | |
| | Often preferred for conversational communications, and sometimes preferred for promotional and transactional communications | | |

There are some cases in which you may want to send a communication on multiple channels at once, such as a donation receipt. But in general, you should segment your audience according to channel preference and the type of communication you're sending.

3. Personalize your content

Personalization is more than putting someone's first name at the start of an email. Consider the difference between these two statements:

"Your support was critical in helping stop hunger in 2019. Will you renew your support this year?"

vs.

Your \$100 donation in 2019 helped feed a family of 4 for 2 weeks in Montgomery County. Will you renew your commitment to helping end hunger in 2020?"

Great personalization demonstrates an understanding of what your audience cares about, and then speaks directly to this interest in a way that is specific and relevant to the recipient. Though this may sound obvious, 56% of people say that the communications they receive from businesses and organizations are not relevant to them.



You can increase relevance by analyzing the data you already have about your supporters in your system of record, like a CRM. Information like supporters' geographic locations, personal interests, or programs of interest will help you build communications that speak directly to the things your donors care about.

You may already have some of this data readily available based on the campaigns supporters have contributed to in the past, but you may also want to ask questions to learn more. For example you can ask supporters follow up questions when they make a donation or [send a survey via email or chatbot](#). Then store this information in your system of record so that you can use it programmatically to personalize your communications.

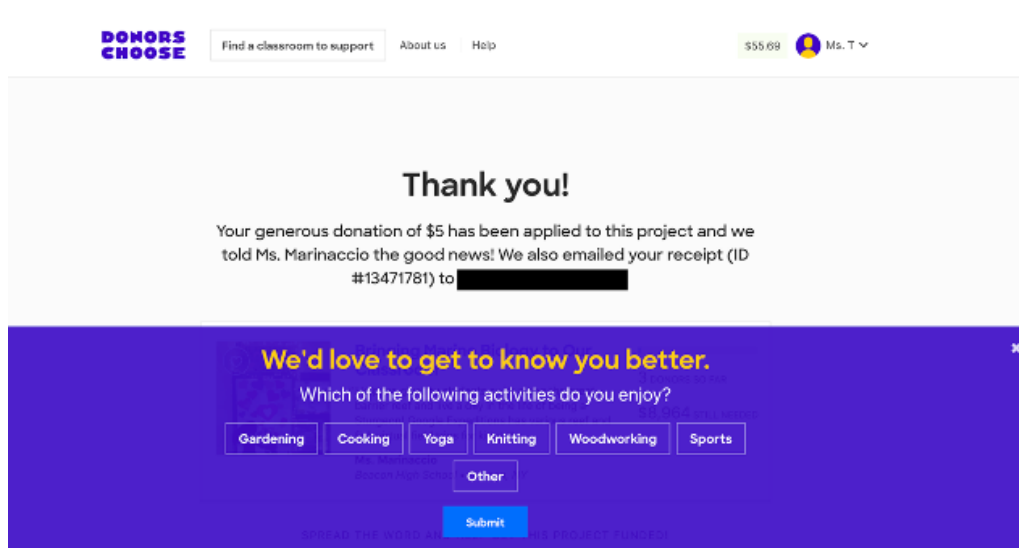


Image: After receiving a donation, DonorsChoose asks short follow up questions to learn more about supporters' interests

Consider how you would answer questions like:

- Which of my programs does this donor care about?
- When did they last give and how much?
- What geographic and demographic information do I know about them?

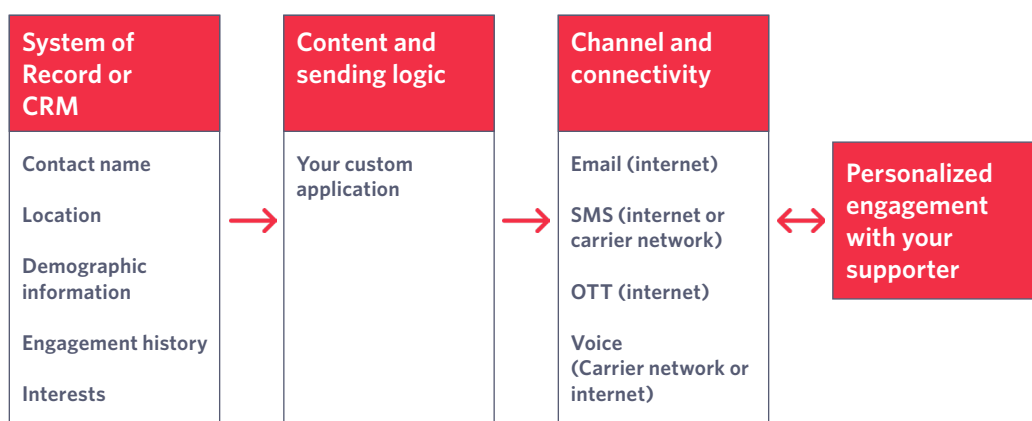
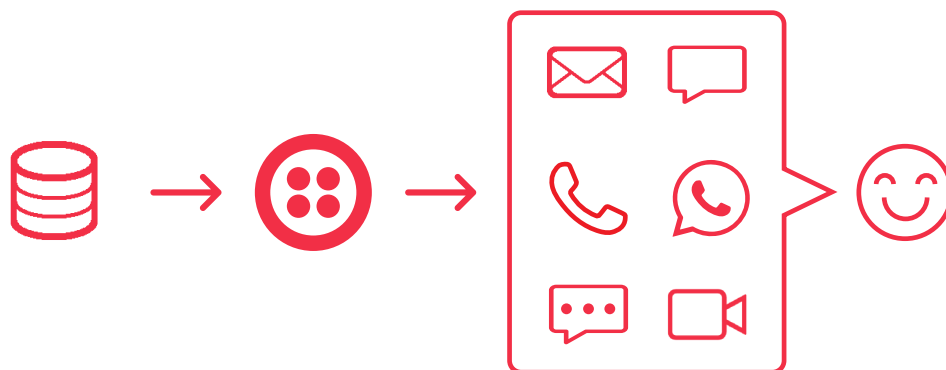
Using the answers to questions like these, you can create customized communications that speak directly to the relationship you have built with a donor.

With communication APIs, you can incorporate personalization like this programmatically, so that each message is unique to the recipient while enabling you to work at scale. A good communications API provider will offer the flexibility



to customize the channel and sending logic so that you can focus on the content that is relevant for your supporters.

Here's an example of what this can look like in practice:



4. Use multimedia

Great fundraising campaigns bring the audience right into the impact your organization is making, and one of the best ways to do this is with multimedia like images, audio, and video. When used correctly, multimedia brings your programs to life and can increase donor conversion rates.

Depending on the communication channel, you will have different options for media you can send (and your audience can receive). Image formats like JPG or PNG, and short videos in GIF format are widely available across communication



channels, and are supported by nearly every mobile device. These are good places to start for enriching your donor communications with multimedia.

Still, the growing popularity of messaging apps like WhatsApp, Facebook Messenger, as well as advancements in text messaging protocols make it possible for more people to exchange a wide array of content over messaging. Below we provide guidance for the types of multimedia you can send across different channels and devices.

Email

Email clients render HTML and CSS differently, in their own ways and for their own reasons. Likewise, email clients have different limitations regarding the types of multimedia they support. As a rule, you can send images in JPG and PNG formats and short videos in GIF format within the body of emails, but many clients simply cannot support rendering video (other than GIFs) in their emails. You can send other types of media like video, audio, and PDF files as attachments.

Text Messaging

MMS: Short for Multimedia Messaging Service, MMS is a standard way to send multimedia such as pictures, videos, and other attachments over cellular networks. With MMS you can send gifs, images, and audio. Though MMS is not supported by every device and carrier, it is widely available across the US, Canada, and many other countries internationally. While their maximum size depends on the carrier and the device receiving the message, 300 KB is often mentioned as the largest size most carriers will reliably handle.

RCS: Rich communication services, or RCS, is an evolution of SMS messaging that offers a universal protocol to enable many features that consumers have enjoyed with other messaging apps like iMessage and WhatsApp. RCS enables transmission of high resolution photos and videos, calendar appointments, real time map integrations, and more. RCS is not yet universally available across carriers and handset manufacturers, notably Apple has not indicated intent to support RCS on its mobile devices. However, according to the GSMA, RCS is used by more than 157 million active users globally, implemented by more than 22 handset manufacturers and support announced on more than 50 carrier networks.



WhatsApp

Because WhatsApp operates over internet protocol (IP), many of the limitations for transmitting multimedia over cellular networks don't apply. With WhatsApp you can send images, audio, video, text, and PDF files up to 16 MB in size to create rich contextual conversations.



Image: Oregon Humane Society uses MMS to enrich their text messaging outreach. Note how this image is designed for the mobile format - it grabs your attention like an image you'd see on social media.

5. Control your frequency

How often you send communications is just as important as what you send. Oftentimes, less is more. Excessive content, appeals, and updates can annoy your supporters and even increase opt-out rates. For example, data shows that SMS opt-out rates tend to increase significantly when businesses begin sending more than 10-15 messages a month.

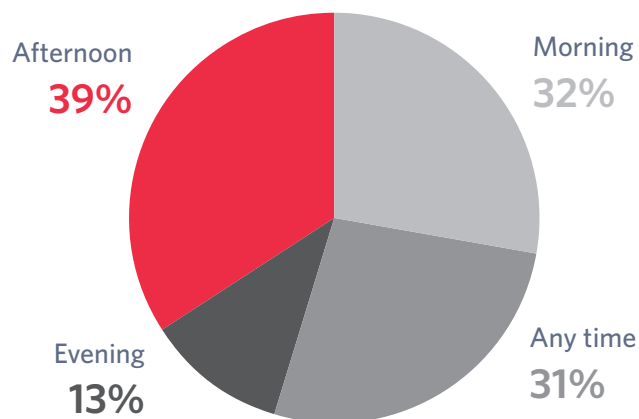


Because you have a limited number of opportunities to contact your donors, it's especially important to make these moments personal, relevant, and wanted. Don't just ask for donations. Balance your asks with other content like program updates, big wins, and thank yous. In a survey, 82% of donors who prefer email for communications said that nonprofits should update supporters at least monthly, with 20% indicating weekly is the right cadence and 17% saying daily.¹

Clearly, the right frequency for communicating will depend on your organization, audience, and channel of communication. Preferences likely vary across your audience as well. Start by sending 1-2 communications a month and track engagement. Adjust based on engagement rates and segment your audience if you see variation across populations.

Try sending at different times of day. While you might find that open rates are highest at a particular time, like 3 PM on Tuesdays, there is likely diversity in preference within your audience. We've found that there can be a surprising range in preferred times to communicate with organizations.

In general, what time of day do you like to receive communications from businesses? Select all that apply.²



Finally, time your messages to align with moments of action. For example, if someone opts into SMS updates about your organization, send a brief message with a program update and a call to support that program. Or if you just wrapped up a campaign, take a moment to send a thank you rather than a promotional message. Simple messages of thanks can go a long way to building your relationship with supporters and it's a great way to start a conversation in a new channel.

¹ [2020 Global Trends in Giving Report](#)

² [Twilio Global Study: Consumer Engagement Best Practices for 2020](#)



Case studies: digital communications in action

The following case studies showcase how three nonprofits use the Twilio engagement platform to drive fundraising results. We hope that these demonstrations of digital communications in action help fuel your creativity for your next fundraising campaign.

DonorsChoose grows teacher philanthropy with personalized emails

DonorsChoose is a nonprofit that helps teachers request the resources they need so their students can receive a great education. These requests are sometimes straightforward supplies like books and pencils or broader initiatives like virtual reality field trips and therapy dog programs. For each of these resources, DonorsChoose is the conduit that matches teachers with donors who can help.

By strategically engaging its donor base, the organization has built one of the most successful email programs in the nonprofit sector. Indeed, their email program accounts for 34% of total revenue coming in from citizen donors, and reached \$25 million annually in 2020.

The nonprofit began using Twilio SendGrid for its transactional email program in 2012. Since then, the team's transactional email program has sustained high delivery and response rates. Seeing the success of its transactional email program, DonorsChoose realized its existing solution for promotional emails wasn't fully meeting its needs. The email team needed more control—largely, the ability to build automation, collect data, and send segmented, personalized emails.

After finding Twilio SendGrid allowed them to build more personalized email experiences, coupled with the continued success of its transactional email solution, DonorsChoose decided Twilio SendGrid's Email API was also the right choice for its promotional email needs.

The flexibility to customize email experiences through Twilio SendGrid's Email API has driven engagement success. Transactional email open rates climbed to 60-70%, with an average click rate of 3-5%. On the promotional side, open rates



reached 30% with click rates around 3%—up from an 18-20% open rate and 2% click rate prior to adopting SendGrid.

To keep up with the ever-evolving schedules of its recipients, DonorsChoose is building a new channel to meet teachers and donors exactly where they are with Twilio's Programmable SMS. DonorsChoose will be able to reach its recipients with the right message at the right time—whether that's reminding teachers about corporate match programs or spreading the word on major campaign fundraising days.

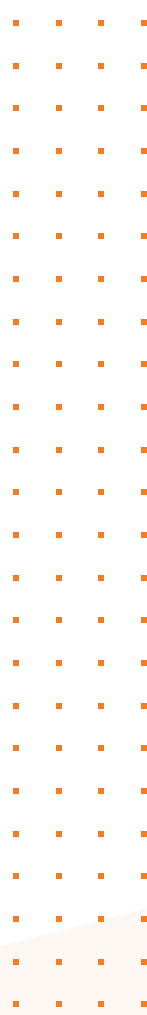
Oregon Humane Society unleashes donations with Twilio for Salesforce

Fundraising is crucial for the Oregon Humane Society, the largest humane society in the Northwest. Accounting for 44% of its annual revenue, fundraising enables OHS to help more than 11,000 homeless, injured, and abused animals find new loving homes each year. The Oregon Humane Society has learned how to take a multi-channel communications strategy approach to meet their supporters where they are — on their mobile devices.

Doggie Dash, a peer-to-peer fundraiser based around a walkathon, is the Oregon Humane Society's largest annual event. In 2018, OHS decided to eliminate the registration fee for Doggie Dash, turning to fundraising to fill the gap. For their new strategy to succeed, OHS needed to increase participant engagement and individual fundraising performance. They turned to Twilio for Salesforce as part of its revamped marketing strategy.

Using email in combination with SMS text messaging, OHS sent participants "flash fundraising challenges" in addition to their traditional event communications. After participants opted in to receive SMS communications, OHS segmented their supporters and sent messages specific to the level of success and engagement of participating "Dashers." Someone who was raising a large amount of money received a different message than someone who was lagging behind.

By focusing on participant engagement, OHS achieved an 84% increase in the number of registered participants, a 24% increase in donations, and a 6.6% increase in the total amount of funds raised. And importantly, Twilio for Salesforce allowed OHS to implement this strategy quickly, using a small team. The organization is now experimenting with effective ways to utilize text messaging in crisis animal rescue situations.





Special Olympics Virginia activates supporters with SMS

What does an organization do when it feels like traditional marketing channels like email and social media are overcrowded? Special Olympics Virginia was able to raise 7% more per person for their largest annual fundraiser when they chose to integrate text messaging.

The Polar Plunge Festival is Special Olympics Virginia's go-to event of the year. Participants take the plunge into icy cold waters in order to raise hundreds of thousands of dollars for sports training, competition, leadership opportunities, and health services to more than 21,000 athletes of all abilities.

The organization has a large email database, however they saw engagement on the channel lagging. Many of the emails were either never opened or deleted.

To drive higher engagement with the event, the Special Olympics Virginia turned to Twilio SMS text and worked with a Twilio partner to create personalized SMS experiences for participants. Messages were segmented for different audiences. For example, team captains, who historically raised the most money, received different messages than their team members. Registrants who signed up some time ago but hadn't raised any funds yet received messages of encouragement to help them get started.

Special Olympics Virginia now plans to build even more conversational experiences based on transactional SMS messages and chatbots. When someone registers for an event, they could receive a text message saying, "So glad you could join us!" If they hit a fundraising goal, they'd get a message saying, "You're close to the next incentive! Can we help you?"



Build lifelong relationships with your supporters using Twilio

We'd love to help you implement the right communications to engage your supporters in 2021 and beyond.

Twilio is the global leader in cloud communications, enabling you to connect with your donors and constituents everywhere they want to interact with you—from text messages to emails, phone calls to video, intelligent chatbots and back—within a single powerful platform. Using Twilio, you can personalize every step of the donor journey with solutions like intelligent chatbots, custom notifications, a completely programmable cloud-based call center, and more.

To help you build your vision for donor engagement, Twilio.org offers nonprofits exclusive benefits through the [Impact Access program](#). More than 6,000 organizations have joined to date, using communications to serve more than 266 million people every year.

By [signing up](#) for the Impact Access program today you'll receive:

- \$500 USD in Twilio kickstart credit + exclusive discounts
- Specialized support from Twilio.org
- Invitation to apply for grants through the Impact Fund



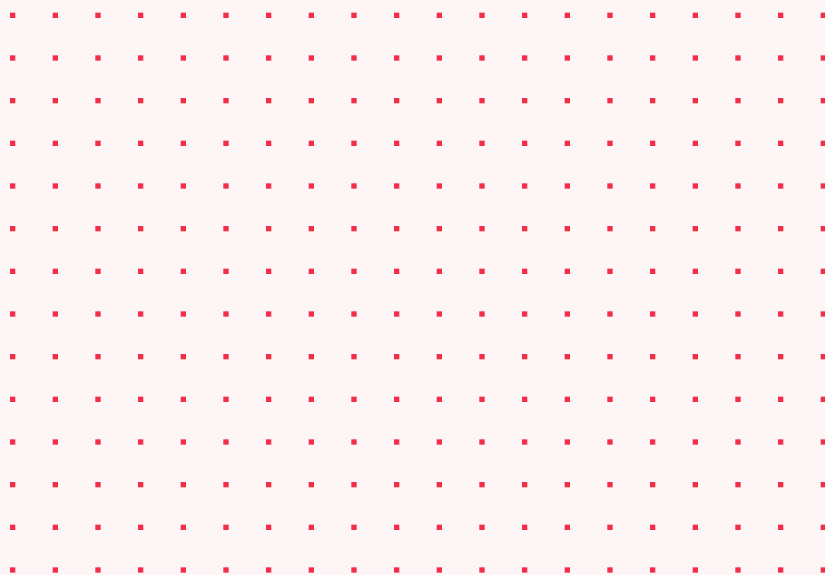
About Twilio

Millions of developers around the world have used Twilio to unlock the magic of communications to improve any human experience. Twilio has democratized communications channels like voice, text, chat, video, and email by virtualizing the world's communications infrastructure through APIs that are simple enough for any developer to use, yet robust enough to power the world's most demanding applications. By making communications a part of every software developer's toolkit, Twilio is enabling innovators across every industry — from emerging leaders to the world's largest organizations — to reinvent how companies engage with their customers.



About Twilio.org

Twilio.org is the social impact arm of Twilio. Moved by our customers, we've seen how nonprofits and social enterprises use communications to tackle some of the world's biggest problems. From the American Red Cross to the Norwegian Refugee Council, Twilio.org empowers more than 6,000 organizations to respond to crises, provide life-changing resources, and inspire action with Twilio technology. Since our establishment in 2013, we have helped our social impact partners reach more than 266 million people and have provided over \$57M in grants, product credits, and discounts to social impact organizations. Through our signature employee impact program, WePledge 1%, we have mobilized over 52% percent of our employees to make a personal impact by donating 1 percent of their time or resources to causes they care about.



Questions?
Contact a Twilio
communications expert.

[Talk to an expert](#)

