



The Pros & Cons of Email Marketing



Date: Oct 27, 2016
Time: 1:00 – 2:30 Eastern Time
Presenter: Andrew Palmer
Director of Marketing Services
PG Calc



AGENDA

1. Why we use email
2. Debunking myths
3. E-newsletters
4. Quality
5. Subject lines
6. Delivery
7. Pros and cons of planned giving email



Why we use email





Why we use email

1. It's personal

Build a relationship electronically





Why we use email

2. It's targeted

Like-minded donors will respond to relevant benefit orientated messaging





Why we use email

3. It's trust-building

Carry over the trust established by your charity

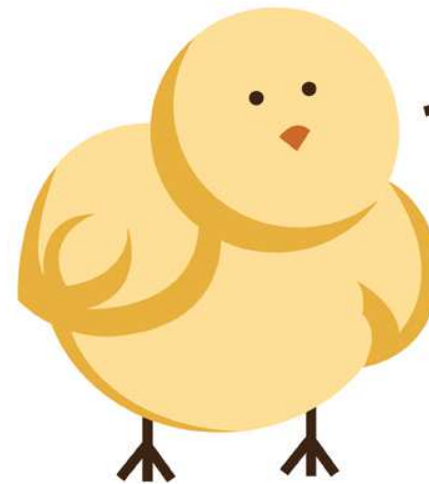




Why we use email

4. It's cost-effective

But is it effective? Cost savings are not enough



CHEAP
CHEAP
CHEAP



Why we use email

5. It's measurable

Learn the online behavior of your donors





Debunking myths

Don't believe everything you read on the Internet, my friend.



someecards
user card

The Legacy Connection Summer 2016

About Us How You Can Give What You Can Give Contact Us

Estes Valley Legacy Announces the Fall River Society

"I have remembered one or more of the member nonprofits of Estes Valley Legacy in plans for my estate." That is all it takes to become a member of the Fall River Society, a growing group of people committed to improving quality of life in the Estes Valley through legacy giving.

In recent years, charitable bequests have accounted for transformative gifts for local organizations like Crossroads Ministry, Salud, Estes Valley Library and others. In some cases, these gifts have given the organizations the confidence needed to build a building or add programs and services they had only dreamed of.

Estes Valley Legacy's Fall River Society honors and recognizes donors who commit to remembering local nonprofits in this way. At a special ceremony each year, new members of the society receive a membership certificate and a special paperweight-size stone from the Fall River, hand painted by children from Estes Park Elementary School.

[Read More >](#)

Our Partner nonprofits:

- Boys & Girls Clubs of Larimer County
- Crossroads Ministry of Estes Park
- Crossroads Ministry of Estes Park Endowment Foundation
- Estes Park Medical Center Foundation
- Estes Park Nonprofit Resource Center
- Estes Valley Community Fund, CFNC
- Estes Valley Crisis Advocates
- Estes Valley Investment in Childhood Success
- Estes Valley Land Trust
- Estes Valley Library Friends and Foundation
- Harmony Foundation
- Rocky Mountain Conservancy
- The Estes Park Learning Place
- YMCA of the Rockies, Estes Park Center

[Visit Our interactive website plannedgiving.epononprofit.org](#)

Beneficiary Designations: A Legacy Made Simple

Life Insurance, at Your Service (and Ours!)



Debunking myths

1. Tuesday is the best day

Some of your best donors are retired and they can read email anytime





Debunking myths

2. You can only send an email once

Remove the openers, send it again with a new subject, and double your open rate





Debunking myths

3. Use short copy only

Don't fall victim to an arbitrary word count, or design

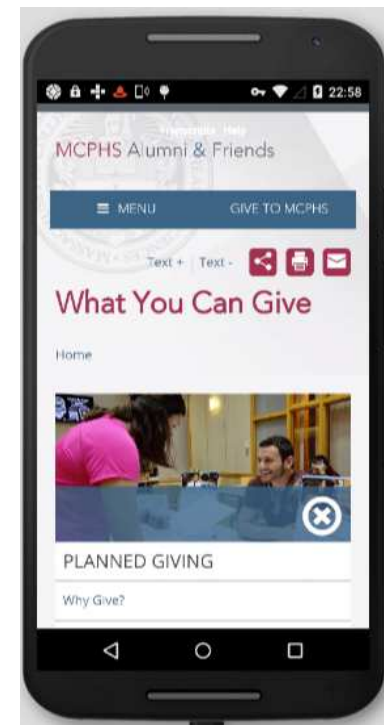




Debunking myths

4. Subject lines must be brief for mobile

Tailoring your creativity to the smallest screen won't get opens





Debunking myths

5. All unsubs are bad

Delivery rates and mailing reputation go up, while the cost for sending email goes down





Debunking myths

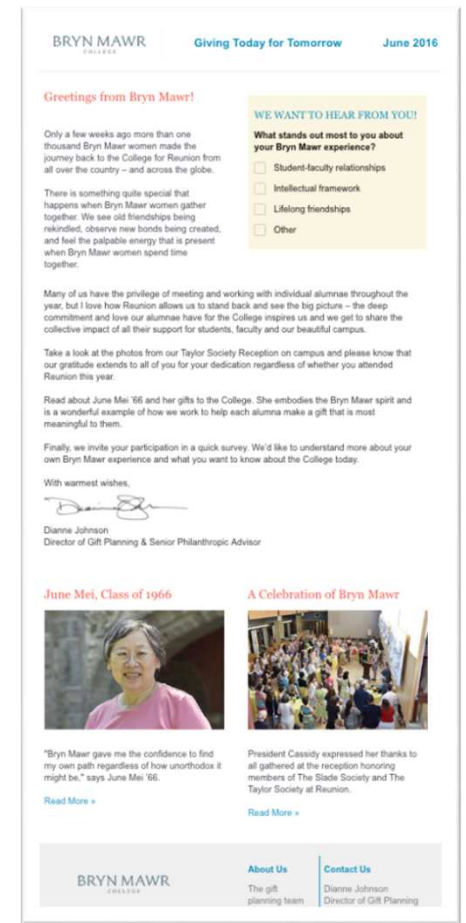
6. Emails should always have an image

Inserting an image for the sake of inserting an image will not help you





E-newsletters

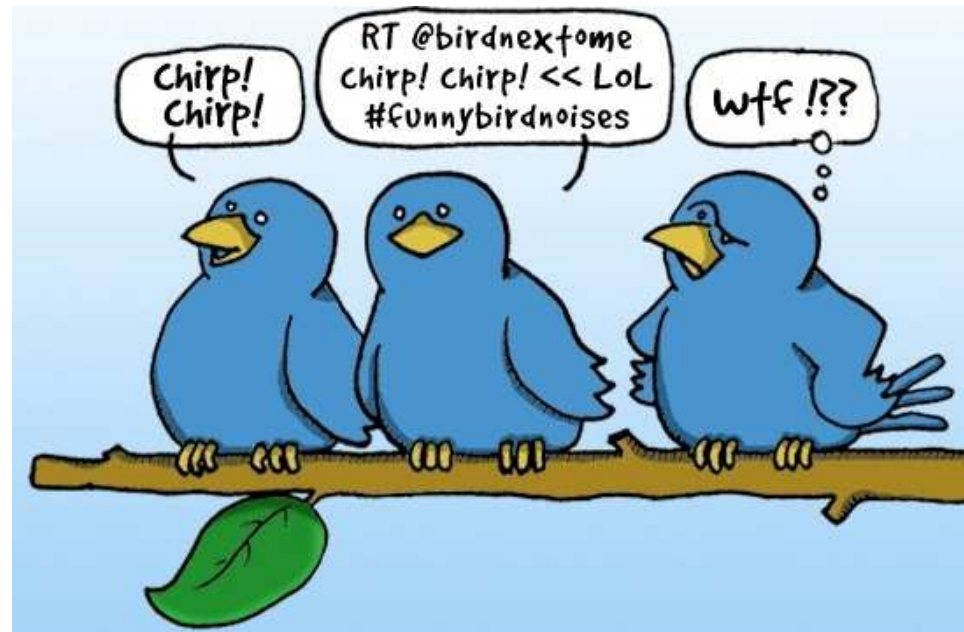




E-newsletters

Did Social Media Kill the Newsletter?

No one wants to be identified as the “death guy”





E-newsletters

1. Focus your message

The worst thing you can do is be cluttered and unfocused





E-newsletters

2. Don't ask

This medium is for educational, relevant, and timely information

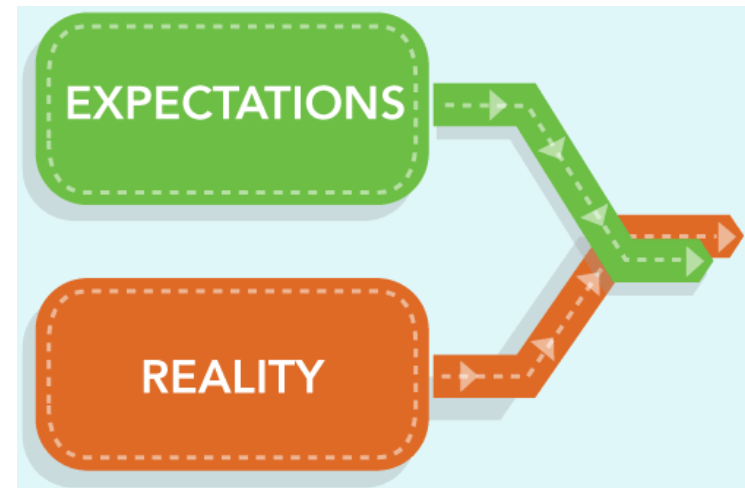




E-newsletters

3. Set expectations when subscribing

The more your donors know what to expect, the more likely they are to absorb the material





E-newsletters

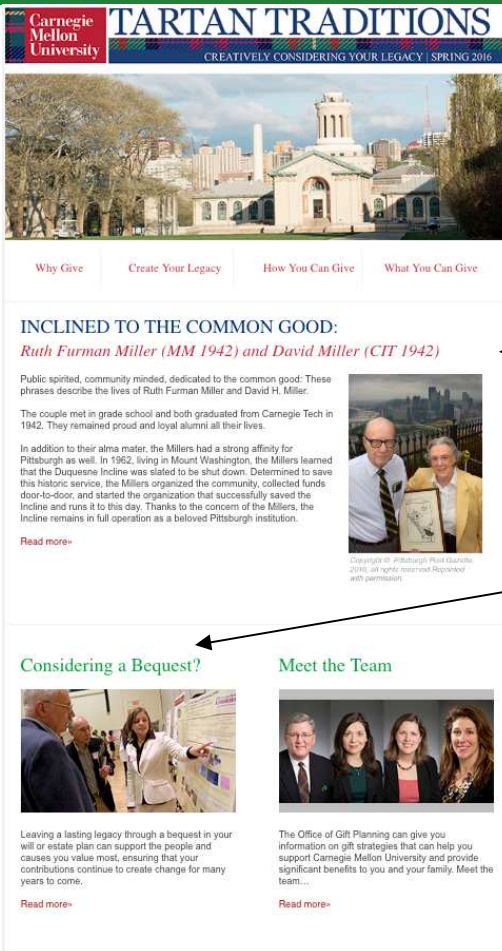
4. Be minimal

For better comprehension and less confusion when reading

W H I T E S P A C E



E-newsletters



Elements of a Newsletter

Donor Story

Related PG article

Personality



E-newsletters

5. Subject Lines

You MUST convince your donors to open

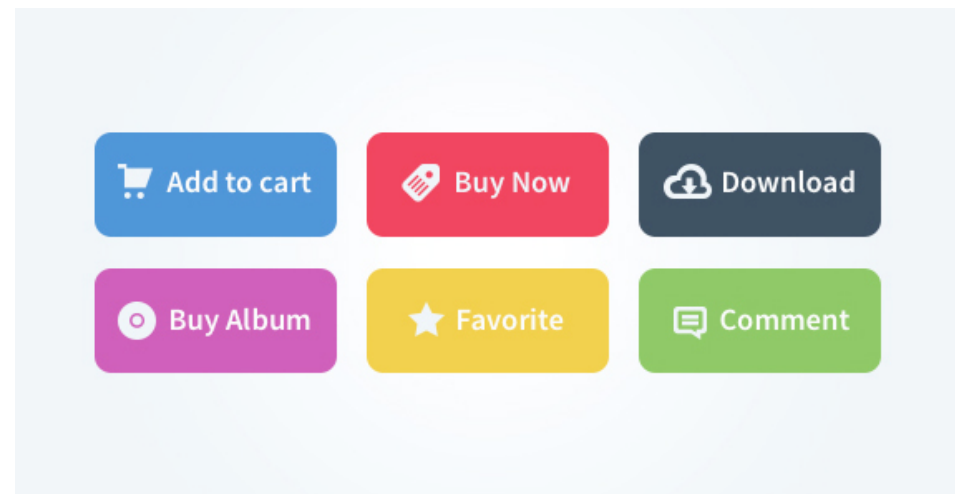




E-newsletters

6. Test the call to action

The look and feel, as well as the wording can make a huge difference





E-newsletters

Testing the addition of a security icon

A

Enter Your E-Mail Address Below
you@company.com
We Value Your Privacy!

B

Enter Your E-Mail Address Below
you@company.com

TESTED 01-OCT
We Value Your Privacy!

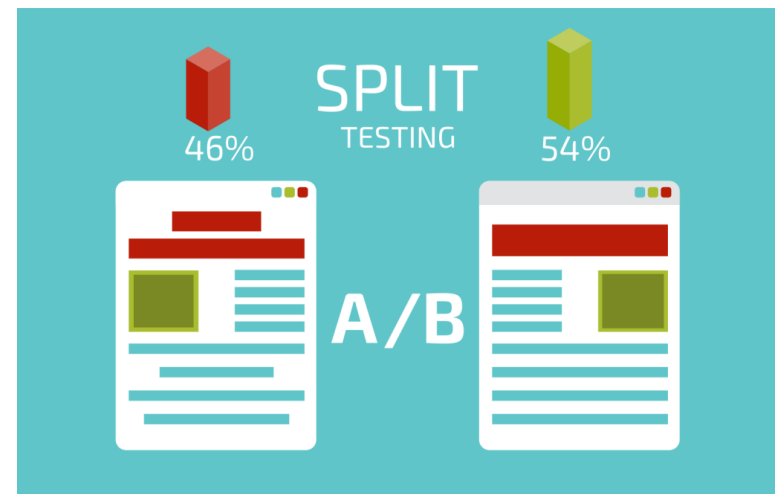
23% more conversions adding the security icon



E-newsletters

7. Test as much as you can

No matter how well your email is performing, it can always do better



OPEN RATE

Test different subject lines and text formatting to achieve the highest possible open rate.

TIP

You can also use [KISSmetrics](#) to track which layouts, calls-to-action and link text perform the best for all your email campaigns.

DESTINATIONS

Landing page destinations should reflect the same sales message conveyed in your email messages. Test different on-page elements to improve conversions.



EMAIL COPY

The sales copy you use in your email will determine how many recipients click through to your website, and how many of those visitors become customers. Experiment with different copy variations and test the effectiveness of each one. Test to see which one works best for you.

RICH VS. PLAIN TEXT

Experiment with both graphically-enhanced "Rich Text" and text-only "Plain Text" message. See which format your subscribers respond to the most.



Quality

Is your email worth reading?



someecards
user card



Charitable Remainder Unitrust:

Give to Caltech and Receive Income For Life

Do you have highly appreciated securities or real estate that you would like to donate to Caltech? Do you also need the income that these assets provide? Would you like to receive greater income from these investments without paying a big capital gains tax?

If you answered "yes," a charitable remainder unitrust may be your ideal way to give. This gift vehicle allows you to make a significant contribution to Caltech and receive important benefits in return.

More flexible than other life-income plans, a unitrust provides protection against inflation. If your unitrust grows, the payments you receive will grow, too.

Benefits include:

- Retirement plans, such as an IRA, your 401(k), 403(b), etc.
- Bank and brokerage accounts, or
- Life insurance policy

To start a conversation about charitable remainder unitrusts complete this form, call 626-395-2927, or email giftplanning@caltech.edu.

Learn more at plannedgiving.caltech.edu/crut

Photography: Ditch Day 2016: Lance Herashida

This postcard is intended for educational purposes only and is not offered and should not be taken as legal, tax, or other professional advice. Always consult an attorney, accountant, or other professional advisor before making any material decisions based on any data presented herein. To ensure compliance with certain IRS requirements, we disclose to you that information contained in this postcard is not intended or written to be used, and may not be used, for the purpose of avoiding tax-related penalties. July 2016.

Caltech



Contact Us

Office of Gift Planning
Gift Planning Coordinator
626-395-2927
giftplanning@caltech.edu

© 2016 California Institute of Technology. All Rights Reserved



Quality

Is it a good read?

Is it a benefit to your donors and relevant to their expectations





Quality

Am I being a pest?

Over-mailing is the number one reason donors don't open





Subject lines

Why do we keep sending email if no one opens it?



someecards
user card

ST. SEBASTIAN'S SCHOOL
Planned Giving eNewsletter

Planning Ahead How You Can Give What You Can Give For Advisors

Giving Back to St. Sebastian's

For 75 years the St. Sebastian's family has taken on the fundamental role of molding young gentlemen "to become all that they can be in body, mind and spirit." Alumni and Parents from every one of its eight decades glowingly reflect on the powerful impact a St. Sebastian's education has on the maturation process of young Arrows and their ability to move gracefully into college and beyond. Members of our School community share a desire to insure that the St. Sebastian's legacy continues and is strengthened by giving back to the school.

I have listed below a few thoughts from the St. Sebastian's family that we have recently received:

"I have included St. Sebastian's in my estate plan so that someone else can have the same experience I had."
— Hanford T. "Bing" Crosby '55

"It's about giving back to a place that made a significant contribution to my education."
— Mark O'Neil '79

"The virtues of honor and respect that Father Reipe bestowed upon all of us are still a benchmark by which I live my life today."
— Mark Dillon '86

"St. Sebastian's is exceptional-and we want it to remain exceptional."
— Ray and Marilyn Ruddy PP '87 & GP '20 & '24

"My son Ryan just finished his freshman year, he absolutely loves the school. I have seen a true transformation in him. Mr. Burke is right when he promises that our sons will be known and loved."
— Kurt Sienkraus '91

"In gratitude to our teachers, friends and family members who gave us incredible opportunities as students, we should embrace our chance as alumni to get involved, support our school, and continue the tradition so that more young men can benefit from all that a St. Sebastian's education offers. The world is a better place with more Arrows."
— Mike Buckley '04

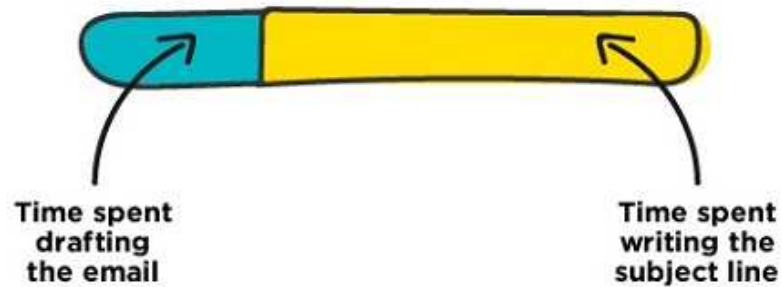


Subject lines

“Licking your phone never tasted so good”

OpenTable

Writing a difficult email





Subject lines

- **Create urgency:** Only 30 days left to give tax-free in 2016
- **Create uniqueness:** Can I pay you for life?
- **Write benefit-oriented copy:** Tax-wise giving opportunities
- **Be ultra-specific:** Get \$1,450 every year for life
- **Keep it clear and concise:** Why you need a will
- **Use humor:** The perfect going-away gift
- **Use numbers:** 5 gifts that pay you back



Subject lines

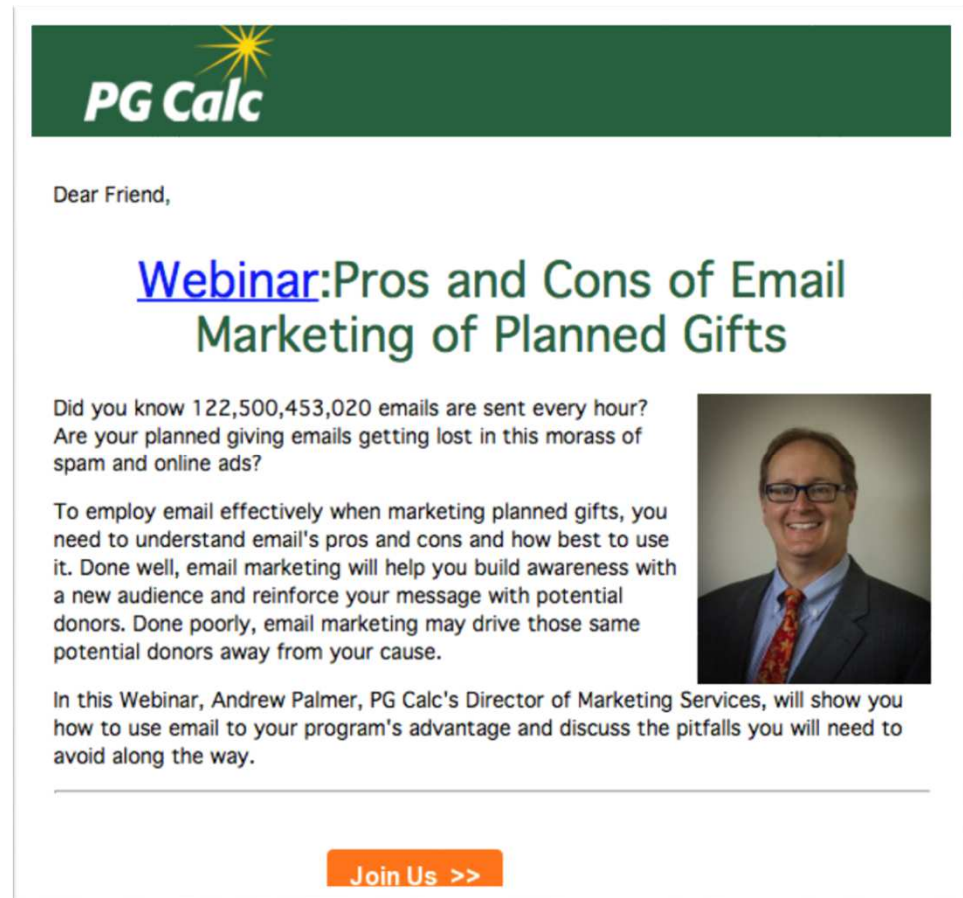
A single word: RSVP

- **30.4% open rate**

VS.

“Webinar on 10/27: Pros and Cons of Email Marketing”

- **15.8% open rate**



The screenshot shows an email from PG Calc. At the top is the PG Calc logo with a yellow starburst. Below the logo is the text "Dear Friend," followed by the subject line "Webinar: Pros and Cons of Email Marketing of Planned Gifts" in blue. The main body of the email contains a paragraph about the volume of emails sent every hour and the challenge of getting through spam. To the right of this paragraph is a portrait of Andrew Palmer, PG Calc's Director of Marketing Services. Below the portrait is another paragraph explaining that the webinar will discuss how to use email effectively and avoid pitfalls. At the bottom right of the email is an orange button that says "Join Us >>".



Subject lines

- **Ask a question:** Can I really get paid for giving?
- **Create a list of three:** Stocks, Bonds, and Mutual Funds
- **Use pop culture:** Always Look On The Bright Side Of Life
- **Alliteration:** How to happily help the homeless
- **Keep it conversational:** What will your legacy be?
- **Be a thief:** Find the legacy within you
(From the Red Cross “Find the volunteer inside of you”)
- **Remember: Keep it under 50 characters**



Subject lines – open rate test

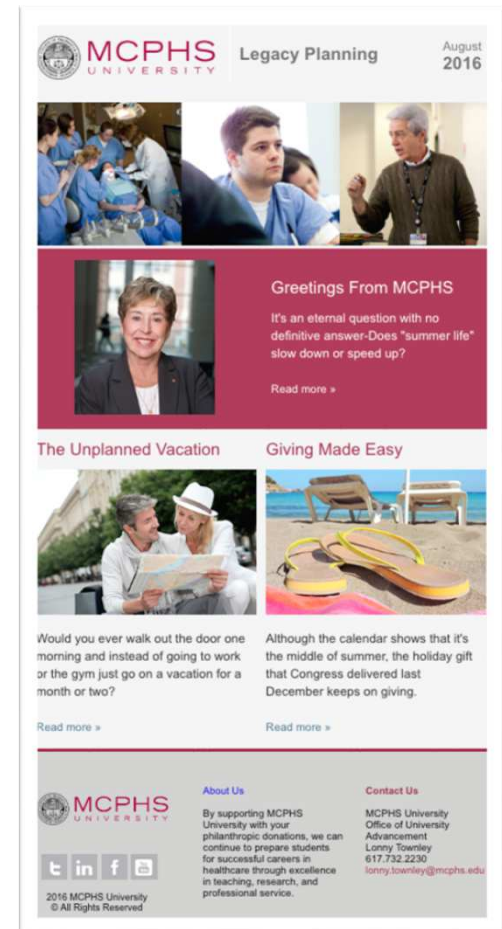
A: **“Planning for the unplanned”** - a variation on the estate planning article.

Open rate of 37.5%.

B: **“Giving made easy”** - the title of an article about the IRA Charitable Rollover.

Open rate of 31.4%

Reaffirming the hypotheses that “giving,” although specific to the mailing, may not give the highest open rates.





Delivery

How can I help ensure my emails are being delivered?



someecards
user card

Carnegie Mellon University

A Legacy Made Simple

It only takes a minute to make a lasting impact

A simple way you can show your support is to name **Carnegie Mellon University** the beneficiary of your:

- Retirement plans, such as an IRA, your 401(k), 403(b), etc.
- Bank and brokerage accounts, or
- Life insurance policy

Beneficiary designations let you specify both the individuals and charities you want to support and the percentage of the assets you want each beneficiary to receive. These gifts are excellent ways to utilize income tax savings to enhance your CMU philanthropy. And it's literally as easy as filling out a form.

You can obtain a Change of Beneficiary form by contacting the retirement plan administrator, bank or insurance provider. The form takes just a few minutes to complete, yet your legacy at CMU will be realized for generations to come.

For more information [click here](#).

Carnegie Mellon University

If you have any questions, please contact:

Joseph D. Butt, JD
Executive Director of Gift Planning
Carnegie Mellon University
412-268-6346
askjdbutt@andrew.cmu.edu



Delivery

1. Email bounces

Bounces can have a negative impact on your delivery rate

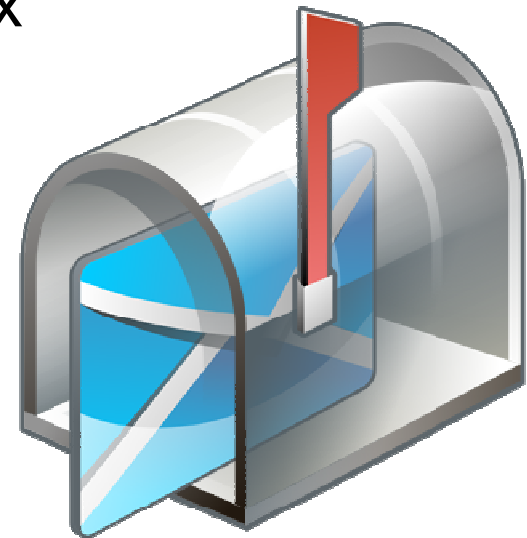




Delivery

2. Content Filtering

Content, low opens, high bounce rate, etc., can put you in the spam box





Delivery

3. Build a clean email list

Don't buy or rent email lists





Delivery

4. Remove role accounts

Remove non-human responding emails such as abuse@; support@; info@, etc.





Delivery

5. Send relevant and engaging email

Don't send email just to send email

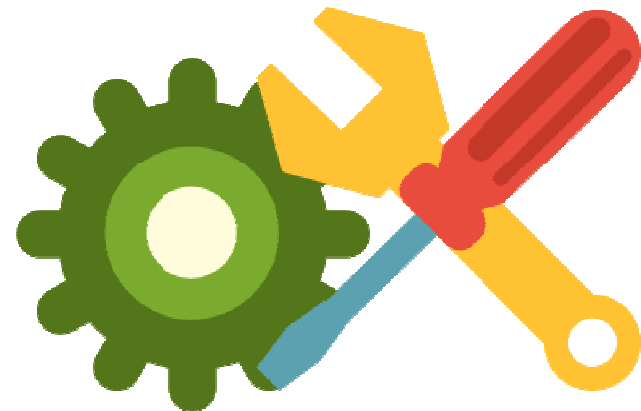




Delivery

6. Customize your From name & Use a real reply-to address

Use a “From” name that ensures donors know exactly who your email is coming from





Pros & Cons

To email, or not to email... that is the question!



someecards
user card

June 2016

National Lutheran Communities & Services

Choices


Why Give | How You Can Give | What You Can Give | For Advisors

Using good fortune in positive ways

Pat Preston gives to benefit others.


Once a week she plays piano for a sing-along at Orchard Woods Health Center at the Village at Orchard Ridge; and, for a much younger set, grades 2-4, leads musical sessions for TEAM Grace, an after school enrichment program, sponsored by Grace Evangelical Lutheran Church, Winchester.

Shortly after moving to Orchard Ridge she helped found a knitting group, now called the Flying Fingers, whose mission is to serve others with warmth of hand-made hats, scarves, and lap robes. In the course of three years this group has made and distributed over 821 items to benefit others.



Read more


An IRA charitable rollover can be a terrific gift



Are your required minimum IRA withdrawals greater than you need, or care to receive? Would you like to reduce the taxable income from your IRA?

Read more

Why give retirement assets to charity?



Why use retirement assets for charitable giving? You designate your children as beneficiaries of your IRA or qualified retirement plan, while in your will or living trust you designate NLCS to receive a gift of appreciated stock.

Read more

National Lutheran Communities & Services

About Us | Contact Us

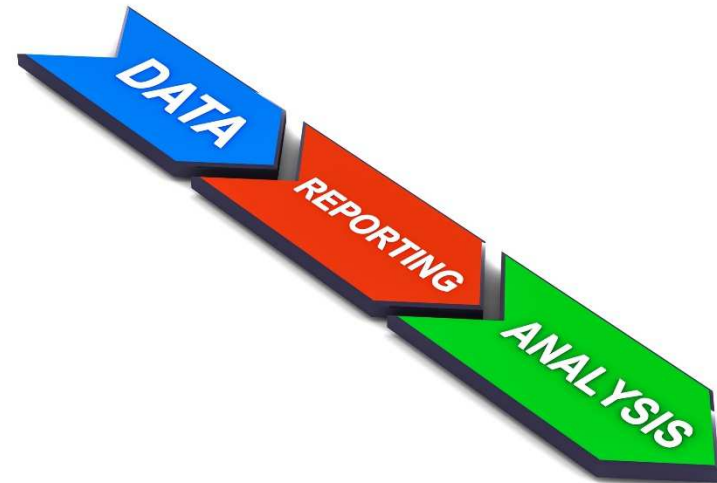
By supporting NLCS with National Lutheran



Reasons for email

1. Tracking and reporting

Learn the behavior of your donors and make changes accordingly





Reasons for email

2. Drive traffic

Don't be a resource center that no one ever sees

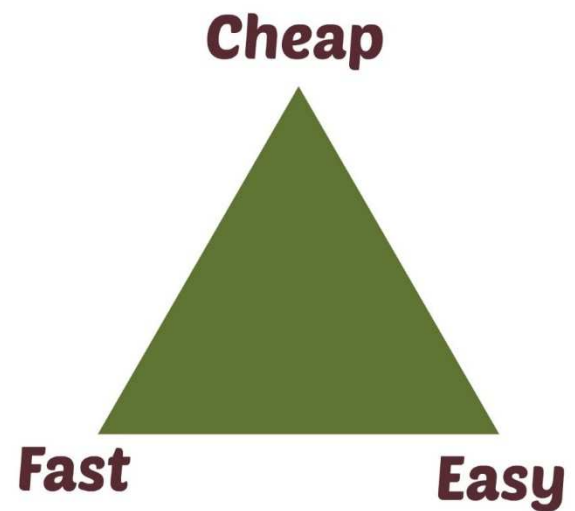




Reasons for email

3. Quick & inexpensive

The time from idea to donor is incredibly short





Reasons for email

4. Relationship building

It's always easier to reach out to a friend regarding a complicated subject than to a stranger





Reasons for email

5. Custom & targeted

Targeted list pulls will give you a higher chance of conversion





Reasons against email

1. Too many emails

It's too easy to overlook planned giving messages





Reasons against email

2. Spam filters

Your email might die alone
in the Junk Mail folder

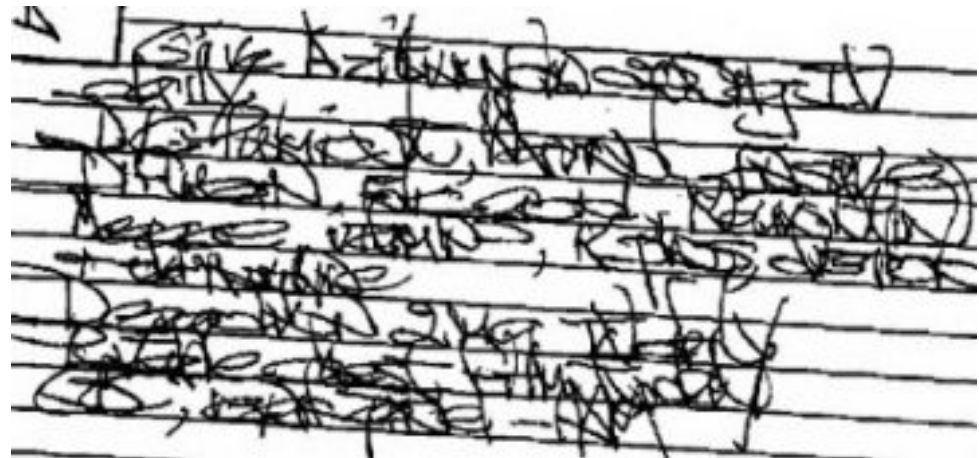




Reasons against email

3. Unreadable view

Non-responsive emails may not be viewable





Reasons against email

4. The content is not interesting

Stay relevant or be skimmed
and/or quickly deleted





Reasons against email

5. Inconsistent mailings

Disorganized mailings may reflect poorly on your organization





CONCLUSION

Integrate your message consistently to your audience of donors

One of the best means of that messaging is via email





Questions and answers





Still have a question?

Contact: Andrew Palmer
Director of Marketing Services
PG Calc

E-mail: apalmer@pgcalc.com