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An Allegiance Group + Pursuant Resource

YOUR ULTIMATE GUIDE TO

Nonprofit Omni-Channel Fundraising & Marketing

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Introduction

More and more, the lines are blurring between marketing and development. The digital transformation is forcing greater integration between these two areas, especially when pursuing similar goals, like engaging supporters and building awareness.

It's no longer enough to cast a wide net with your messaging and hope you bring in enough gifts to meet your goals. Today's donors want to be engaged in personal and relevant ways that align with their interests and affinities. And they expect consistent messaging so that your organization feels the same wherever they interact with you.

Most nonprofits recognize the importance of engaging donors through multiple channels, but these efforts often lack a strategy or focus. Remember, the goal is to drive donors toward deeper levels of engagement with your organization.

Omni-channel marketing is the integration of who, what, when, and where. It develops an intentional and strategic brand experience that targets your audience by utilizing all communication channels your donors are consuming, such as email, social media, direct mail, website, CTV, or phone. This strategy gives supporters a holistic experience centered on their preferences and behavior, which in turn will increase their loyalty to your cause.

Omni-channel marketing is an organization-wide endeavor. If you're operating in silos, you can't present one cohesive experience to your supporters. But if you work together with a unified approach, you'll grow your engagement and support.

Four Approaches to Donor Engagement: A Quick Glossary



Before we dive into creating an omni-channel donor experience, it's important to define the marketing terms that are essential for the conversation and identify how they apply to our work as fundraisers:

- » **Cross-Channel Fundraising:** The use of one communication channel to support or promote another, such as including a link to a campaign microsite in a direct mail piece, then using online behavior and interests to personalize a follow-up phone call.
- » **Multi-Channel Fundraising:** The use of multiple communication channels—direct mail, email, websites, social media, TV, etc.—to disseminate information. While the branding used may be consistent in multi-channel marketing, many nonprofits employ multiple channels without coordinating their efforts across those channels.
- » **Integrated Fundraising:** A communication strategy that uses multiple marketing communications channels. An integrated campaign will employ traditional and digital channels to create a strategic and coordinated donor journey. Simply, it means utilizing multiple channels that are coordinated to reach your audience strategically.
- » **Omni-Channel Fundraising:** Supports a range of channels for a single donor experience and provides a feedback loop for individuals to dictate how they want to engage. Unlike multi-channel or integrated fundraising, omni-channel interactions are integrated to provide media-rich donor experiences. In omni-channel fundraising, there is intentional, strategic coordination in what story your organization is telling its selected targeted audience across the different communications channels they are consuming. An omni-channel strategy can provide supporters with a holistic experience centered on their preferences and behavior.

The Value of an Omni-Channel Donor Experience

Why is omni-channel communication essential to a nonprofit's strategy? When your organization optimizes an omni-channel approach, you can:

- » **Cultivate deeper, more relevant relationships with your donors.** Talking to donor segments in light of what you know about them will encourage their sense of connection to your organization. Continually refining this information will help increase your ability to personalize each message.
- » **Reduce costs and minimize lost opportunities.** Precious resources are wasted while trying to gain or reactivate disinterested prospects and past donors. An omni-channel strategy increases fundraising effectiveness through targeted messaging in thoughtfully chosen channels. As a result, resources can be directed where they will have the greatest impact and provide maximum donor engagement.
- » **Reduce donor frustration.** Knowing when and how your donors prefer to be solicited can greatly improve their response rate to your requests. Creating an intuitive way for them to respond is also an important part of the process.

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- » **Increase the lifetime value of donors.** Successful omni-channel communication will provide the highest rate of return over the life cycle of most supporters. With a focus on measuring lifetime value, you seek to develop long-term relationships with donors while removing the temptation to use tactics that may contribute only short-term value and detract from the overall strategy.
- » **Build stronger internal relationships and team morale.** Omni-channel communication requires all departments to work together in sync. Done well, this approach helps you break down the silos that often keep an organization from succeeding.



Break Through the Barriers That Prevent Omni-Channel Communication

Many nonprofit leaders and fundraising professionals understand the benefits of an omni-channel approach, but it's difficult to implement. Our hope is that this resource will help you break down some of the barriers that prevent organizations from creating an omni-channel donor experience and enjoy the opportunities this strategy creates for your cause, such as reaching more donors and raising more money.

Why is Omni-Channel Communication So Difficult?

For most nonprofits, omni-channel communication is extremely difficult to implement, but it doesn't have to be that way for your organization. Here are the common barriers we see to true integration and how you can overcome them.

Challenge #1: Leadership and Organizational Misalignment

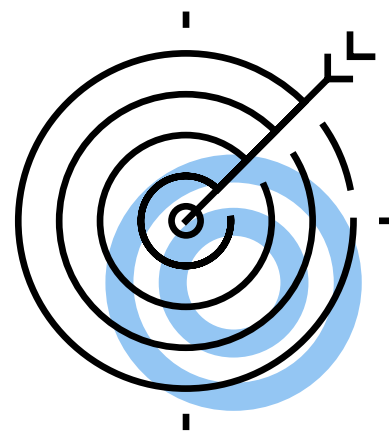
It's easy for teams within nonprofits to get out of alignment with their strategy and each other. Leadership must drive integration into the organization's structure, from personnel to communication calendars, before they can successfully integrate their marketing and fundraising strategies.

The lack of a unified effort among executive, development, marketing, and program teams toward shared goals results in wasted investment and missed opportunities. Organizations often see tension between their marketing and development teams because each communicates differently—marketers tend to be more focused on building brand awareness, while fundraisers focus on generating more revenue.

Unifying these teams' strengths to achieve a common goal will get messaging in sync.

Challenge #2: Lack of Clarity on Campaign Objectives and Goals

Too many organizations launch a fundraising campaign without first taking the time to clarify what they're trying to accomplish through the campaign, who the target audience is, what tactics they'll use, and who's responsible for those tactics. Your ultimate objective should drive your goal and the metrics you use to report results.



Challenge #3: Channel Attribution

Attribution is complex and can be paralyzing for most organizations of all shapes and sizes. When taking an omni-channel approach, you may receive a large sum of revenue from donors who seemingly come out of nowhere

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due to the utilization of multiple communications channels. As a result, you're unable to accurately measure ROI. Understanding advanced analytics may be difficult at first for your organization but will continue to open doors of opportunity.

Challenge #4: Limited Resources

Fundraisers often point to limited resources—people, time, and money—as a key reason for limiting their efforts. Frequently, those resource allocations are as fragmented as the fundraising strategy itself.

Challenge #5: Disparate, Absent, or Inaccessible Data

A lack of detailed, reliable data on constituents' interests and preferences—and an effective system for managing that data—hinders an organization's ability to craft an informed strategy. While tech and social media platforms offer data insights, they're also in a constant state of flux as they develop new policies and algorithms. Gathering zero- and first-party data will be essential, as will utilizing a tool like GivingDNA as part of your comprehensive agency solutions to identify donor trends and behaviors.

Challenge #6: Risk Aversion

The nonprofit industry is not designed to constantly innovate. Organizations aren't equipped with large research and development budgets. With limited resources, many nonprofit leaders are doing everything they can to either simply maintain or take small steps toward growth. As a result, many nonprofits may fear falling behind by taking the time to restructure their strategy. They may avoid taking a risk on a new strategy or technology due to their lack of confidence that the risk will produce the expected income in the short term.

Challenge #7: Resistance to New Methods

Let's face it... it's a lot easier to maintain the status quo than it is to try an idea that might produce breakthrough results. Sometimes, staff members poised to embrace new techniques are often held back by those in upper management who are unclear on the possibilities or unsure of how to parlay their years of experience into new strategies and technologies.

It Isn't Easy, but It's Worth It.

While these common barriers to omni-channel communication are indeed challenging, **they are by no means insurmountable.**

The solutions we spell out in the next section have worked for nonprofits of various sizes, sectors, and constituencies. You'll need to implement each one with patience, although in our experience, it doesn't take long at all to see results.



Leadership & Organizational Principles: **Break Down Silos That Prevent Omni-Channel Integration**

The culture of your organization may need an overhaul to coordinate your efforts in a way that creates an omni-channel donor experience. You'll need to take an objective look at your organizational structure and processes and seek change as you both evaluate and prepare your nonprofit for the shift toward integration.

Drive Integration Into Your Organization's Structure

Perhaps the greatest leap you will ever make toward true omni-channel integration is to eliminate the barriers that keep your people (and thus your campaigns and messages) operating independently of each other.

Nonprofits tend to be internally divided according to:

- » **Donor pyramid levels**
- » **Program and service areas**
- » **Offline and online channels**

The lack of a unified effort toward shared goals results in wasted investment and missed opportunities. If the measurements of success are customized to each department or program unit and don't roll up into broader goals, then even well-meaning teams are unintentionally being incentivized to work against each other.

Make it a top priority to realign your internal structures and metrics before launching your next major campaign.

- 1. Give each team success metrics that tie into the single overarching goal.**
- 2. Arrange planning meetings with key representatives from your executive, development, and program teams.**
- 3. Set the strategy and allow individual stakeholders to execute their own portion accordingly. From the executive suite to “siloed” program departments, leadership must pull the organization together around common goals and objectives.**

Measure What Matters: Experience Supersedes Channels

Measuring the effectiveness of omni-channel programs is key to constant improvement. From the outset of any campaign, you should record all donor touches—what message is going out through which channel—rather than simply marking which channels a donor uses to respond. Knowing what messages were used to touch a donor will give you context for the analytics you'll produce later.

Taking time to test and monitor what works in regards to messaging and content will improve the rate of return on each campaign more so than tracking which marketing channel is working. For example, analytics may prove that donors engage more frequently when they're sent shorter emails. You may find a postcard with an inspiring image performs better than phone calls, or vice versa. For social media, look beyond likes to measure the success of each platform: what channels are bringing deeper engagement and helping donors take their next step? Facebook may drive more traffic to your campaign, but LinkedIn and Instagram have higher conversion rates.

Leverage Technology to Enhance Your Strategy

As you align your internal departments to work toward shared goals, you must realize that technology also plays an important role. You cannot truly measure the worth of creating an omni-channel approach unless you can coordinate your donor engagement efforts and track it with data. The good news is that advances in technology have made it easier than ever to accomplish this effort.

Data privacy challenges continue to evolve, as tech platforms like Google and Apple change their policies and restrictions. There are other ways you can gather data. For instance, start collecting as much zero- and first-party data as you can now through progressive profiling and interactive digital experiences, and identify new ways to measure performance.

- » **Zero-party data.** This is the data that a user volunteers, such as when they fill out a form or answer a survey. No cookies are involved in its acquisition, and it's the most trustworthy data, since it comes directly from the user. Collect zero-party data with quizzes, surveys, forms, and social media polls.
- » **First-party data.** This is the data you acquire via cookies on your own website, such as how long a visitor stays on a page, or which ones they visit. Collect first-party data by tracking website behavior, transaction information, and engagement.



Automate: Let technology do the tedious routine work.

If you haven't done so already, now is the time to automate manual routine practices, such as creating a welcome series for new names, segmenting your donor file based on interests and communication preferences, and monitoring engagement to help you follow up with donors who express the most interest.

Develop a unified database or CRM—this is essential for a properly functioning omni-channel strategy. With a unified CRM, engagement data is stored in one location, so you can easily segment supporters to construct a personalized experience for each of your donors. Get the most out of your CRM by partnering with GivingDNA, which analyzes your constituent file to identify trends, traits, and motivations.



Integrate: Find a solution that coordinates with other technology.

Having a data analytics solution that can integrate with your fundraising, finance, and donor management systems is essential for success. As technology continues to evolve, solutions that were once reserved for the leading nonprofits are now available for every organization.

For instance, it's easier than ever to give your donors multiple options for donating, which has been proven to increase the gift amount. An ACH (bank transfer) payment option doubles the amount of a one-time gift and leads to a 29% increase in recurring gifts compared to credit cards. Today's donors want ACH, PayPal, Venmo, even cryptocurrency payment options.



Testing: Best practices to enhance your strategies along the way.

Another benefit of donor communication technology is that it allows you to track your progress and gather a significant amount of valuable information you can use to improve your strategy along the way.

To know for sure if you should invest more into centralizing your systems, analyze a small group of donors and document everything they are receiving from the organization through every channel. This will show you if your system is decentralized and highlight the need for one that is integrated.



Allocate resources where data reveals opportunity.

Use data analytics that show your donors' preferences to determine where you should be spending your budget dollars. It's a poor strategy to budget resources arbitrarily by channel instead of actual results. When you see a positive trend in your analytics—even if it deviates from your original budget—divert resources to it.

When your strategy is reinforced by data, you'll know where best to spend your money. Pull resources currently allocated to specific channels (e.g., telemarketing, direct mail, etc.) and then redistribute those resources based on available opportunities.

If you'd be more comfortable starting small, design a test or pilot. Focus on a mini-campaign and measure the results, then tweak and expand using past success as leverage to garner future resources that create scalability.

Taking the time to tackle the hard issues internally before launching major campaigns is worth the effort.

Organizational development is tied to financial and donor health. These internal changes will prepare you for success as you pull your marketing and fundraising strategies together into one integrated plan.

Implementation & Execution Best Practices: **Creating an Omni-Channel Experience**

Now it's time to dive into the strategy and tactics to create an omni-channel experience.

Once organizational structure and culture are aligned, omni-channel communications can be brought directly into your fundraising and marketing systems.

Start With a Clear Understanding of Campaign Objectives

Do you want to raise awareness of your cause or your organization and its work? Do you need to acquire new donors to offset your donor attrition rate? Are you looking to improve your donor retention rate?

Choose the objectives for each campaign and micro-campaign you deploy, and keep them top of mind throughout the entire process.

What are the goals for each channel?

Create goals for each campaign that align with your objectives. If your objective is to drive awareness of your organization, you may have goals for sharing and likes on social



media channels. If the objective is acquisition, your goals may include the number or percentage of new donors acquired to your donor base.

Being clear about your goals and objectives will avoid confusion and disappointment when you report on the progress of your campaigns. Even a decisive victory will look grim if you bring social sharing analytics to your upper management when they're looking for newly acquired donors.

Develop a Data-Driven Strategy

To craft a centralized strategy, you'll need to assess your constituent data. Extensive, reliable data that tells you who your supporters and donors are, their propensity and capacity to give, and their specific interests and preferences will be highly informative in your decisions.

Determine what data will be required to make decisions and how it will be captured and updated in an ongoing fashion. You don't have to have a complicated plan, just a thorough one.

Capture key behavioral data during your campaigns, such as how your donors interact with your emails and website, so you can engage donors according to their preferences and motivations.

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Avoid relying too heavily on giving history. A donor's giving history is a reflection of past fundraising strategy, not necessarily his or her current motivations or preferences.

Develop a comprehensive plan that incorporates all available and sustainable channels of communication. Map out a journey against this strategy and ensure that communication is customized and consistent to each constituent no matter how they transition from one channel to the next.

Stay authentic and targeted. Targeting communications will convert more than blanket messaging. It shows supporters and donors you care by taking extra time to ensure a more personalized experience with the resources you have.

Targeting your communications allows you to put the right message in front of the right donor on the right channels.

For example, Moody Bible Institute was able to grow their mid-level giving program by using GivingDNA to identify key mid-level donor segments to personalize and target their outreach. The data insights allowed them to identify donors' interests, capacity, demographics, philanthropic priorities, and preferred communication channels. They segmented donors into groups based on their similarities and created versioned communications to reach out to them in a more personal and tailored approach. This targeted communications strategy resulted in a 20.9% increase in giving.

Plan Your Campaigns Based on Preferences, Motivations, and Relationships With Your Organization

Nonprofits often build fundraising and marketing programs based on what's most convenient for them, rather than what works best for the donor. For example, you may space out several direct mail sends with a few emails in between according to timing that's manageable for you and your team.

But that might not be the sequence or combination that will drive donors to give.

For example, the moment a supporter first subscribes to your email list is a high point of their interest and

engagement—they're requesting to hear more from you. According to NextAfter, when a nonprofit implements a new name welcome series with a humanistic, relational approach, donor acquisition can increase by 33%, with 42% more clicks and 875% more donations.



A personal, human approach to welcome emails can increase new donor acquisition by

45%

Engagement with donors keeps changing, and nonprofit professionals are reporting that by expanding their communication channels (i.e., virtual events, direct mail, social media, video sharing, and more), overall revenue increased. In recent years, many organizations have doubled down on promoting online donations and made monthly giving a priority.

Donors continue to express an interest in a multitude of digital options to engage with organizations.

Your fundraising approach should come from a donor-centric perspective.

Use your donor data to establish donors' preferred methods and timing. Interactions should speak to specific donors, and giving options should be intuitive.

It's important that nonprofits exceed the expectations of their constituents at every interaction.

Personalization is key. How well do you know your donors? How much updated, relevant data do you have for each constituent? Gone are the days of general mass mailings; if communications aren't highly personalized, you risk losing the attention of your prospects and donors.

It's important that nonprofits exceed the expectations of their constituents at every interaction. To do this right, you can't rely on analysis from the database alone; you must get primary research directly from your donors. Talk with them, survey them, visit them. Use primary research to better interpret the analytics you're pulling.

Segment your donors based on their relationship with the organization.

Understanding your donors goes well beyond recording how they respond to your messaging. You need to discover how your whole donor base feels about your brand at every level of engagement. This will enable your organization to craft appropriate channel and message strategies aligned with the interests of each donor type.

Consider How Each Channel Plays Into Your Overall Strategy

Just because you can do something in every channel doesn't mean you should. By evaluating data and segmenting donors, you can identify the right channels for the right audiences and coordinate those channels to work together.

We suggest organizations map the ideal experience—based on data—that they feel each level of donor should follow and then use that information to craft the omni-channel plan. For example, a non-donor will have a different path than a new donor, which would differ from the multi-year donor, the major donor, and so on.

Optimize your efforts with automation.

The time spent in mapping out donor experiences based on data and primary research pays off if you begin to automate your fundraising communication. For example, mapping out an automated follow-up sequence that's triggered by a single action can not only help you increase your consistency of messaging in each level of engagement, but it also provides an immediate, personalized connection with your donor.

Timing is critical for omni-channel communication. If someone in your organization doesn't hear back from you or get the information they are looking for right away, they will lose interest.

Just because you can do something in every channel doesn't mean you should.

With the ability to collect data effectively and segment it quickly—based on actions in a variety of channels—workflow automation puts your data to good use and ensures you're sending the right message to the right audience at the right time.

Measuring Integrated Donor Experience Fundraising Effectiveness

As with any initiative, it's critical that you decide up front which success metrics are important and how you'll capture the data and report on the results. This is especially true if your organization is accustomed to uncoordinated tactics in fundraising.

Measuring the effectiveness of your integrated fundraising strategy is important, but it looks slightly different than some of the traditional ROI metrics you might be measuring. The more relational experience created by integrated fundraising produces long-term ROI and higher lifetime value from your donors.

Here are some common metrics your organization can use to measure your efforts to create an integrated donor experience:

Engagement

Tracking engagement is essential for understanding if your efforts are moving donors toward a deeper relationship with your organization. Develop a multi-attribution model as a guide to monitor performance. The model should show how you determine which donor touchpoints are the most important and effective in the donor's journey. Determine which touchpoints in order of influence had the greatest impact on your organization's overall revenue.

Here are a few engagement metrics to monitor:

- » **Email opens and click-through rates by individuals**
- » **Length of time a constituent watches a video you share**
- » **Rate of response both online and through direct mail**
- » **Length of time between message sends and recipient responses**
- » **Website traffic and other online interaction**
- » **Cross-channel movement, such as direct mail recipients who go online to an enclosed URL or email recipients who give through a custom landing page**

Average Gift

Be sure to watch for the average gift of your donor base to rise over time. This is the metric that will help you see past any short-term slump in ROI in the first forays into an omni-channel approach.

A 2024 report from M+R Benchmarks shows that in 2023 the average gift size of a monthly gift was \$24, while the average one-time gift was \$115.

But averages are just averages. While

it's good to be aware of nonprofit benchmarks, you'll get the most out of tracking your own average gift size metrics over time.



\$115

was the average one-time gift in 2023.

Multi-Channel Givers

Taking an omni-channel approach can result in even greater success for your organization. Donors positively respond to multiple channels of communication.

For example:

- » **Direct mail with digital ads yields a 28% higher conversion rate.** What's more, when considering where to focus your social media presence, nearly 84% of traffic driven to a campaign originated on Facebook.
- » **The combination of one or more digital media with direct mail leads to a 118% increase in response rate** compared to using direct mail only.
- » **View-through revenue** (donations from supporters who have been served an ad but arrived at the donation page through another means) **accounted for 35% of all digital giving in 2023.**

It's important to note that shifting your current efforts to an omni-channel approach might impact some short-term gains. When an organization changes its strategy to create a more relational experience for donors, the short-term ROI might suffer compared to previous campaigns. However, the approach ultimately creates a far better long-term value (and lifetime value of the donors) than the “churn and burn” strategies most organizations are currently applying.



Conclusion:

It's Time to Take the First Step

We know breaking down the silos and adopting an omni-channel strategy isn't easy. **We encourage every nonprofit we work with to focus on progress rather than perfection.**

Today, nonprofits face a number of new challenges. Tight budgets, inflation, and limited resources are forcing organizations to pivot and acquire new fundraising tactics. The pandemic forced organizations to pivot and acquire new tactics to their fundraising. Creative fundraising ideas create new opportunities for donors by providing them with easier access to organizations and simple donation processes. In times of uncertainty and challenge, nonprofits must remain nimble.

Start internally by fostering a culture of collaboration among your teams and departments.

This begins with leadership at the top. Consider creating a shared budget between marketing and fundraising, along with a shared calendar, to cement your commitment to working together. Extend that culture into your external relationships with outside partners by encouraging them to collaborate more closely with your team and other external partners you may have.

Coordinating your efforts
to create an omni-channel
donor experience isn't just
important — it's essential.

Organizations must also push their partners to do more. To enable your partners to do more for you, show them how they fit into your omni-channel strategy and their role on the team. Introduce them to your other external partners and suggest ways they can work together within their areas of expertise toward your overall objectives. Important note: if a partner seems nervous about or threatened by working with another external partner, steer clear. You need team players who see the big picture and are pulling in the same direction with you.

The overall return will prove that the whole is truly greater than the sum of its parts.

The benefits to having an omni-channel approach far outweigh the obstacles. An omni-channel fundraising strategy will reduce your dependence on individual channels and help you invest wisely where you see the best returns. It will also help you build stronger relationships with your constituents and increase the lifetime value of your donors.

Coordinating your efforts to create an omni-channel donor experience isn't just important—it's essential. Our hope is that this resource will help you define some of the gaps that are preventing you from achieving this goal and take the first step toward solving the issue within your organization.



Connect with **Allegiance Group + Pursuant**

Learn more about our technology-driven solutions that can enhance your fundraising and marketing efforts.

- » Check out our [entire list of fundraising resources](#) for more whitepapers, fundraising tools, and webinars.
- » Connect with us on [LinkedIn](#) and [Facebook](#).
- » Subscribe to [The Impact Angle](#), our weekly newsletter featuring valuable insights and best practices around today's most important fundraising topics.
- » Reach out to sales@teamallegiance.com or 844-858-7654 to learn how we can help with your organization's fundraising needs.

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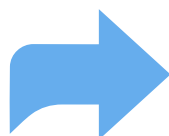
Allegiance Group + Pursuant stands at the forefront of innovation, empowering nonprofits with cutting-edge, tech-led marketing and fundraising solutions. With a legacy of decades of experience in digital, web, UX, and advertising excellence, we've evolved into the ultimate one-stop-shop for nonprofits seeking a comprehensive, digital-first partner.

Our mission is bold: to inspire action and create a lasting impact.

Allegiance Group + Pursuant brings together experts in strategy, fundraising, development, creativity, and analysis. We're not just a service provider; we're your growth catalyst. From expanding your supporter base to enhancing brand experiences and leveraging custom fundraising software, we drive strategic and intelligent growth.

Choose Allegiance Group + Pursuant for Strategy & Consulting, Web Design & Development, Digital Marketing, Advocacy, Membership Acquisition & Retention, Donation Platforms, Loyalty Programs, and more. Our clients feed the hungry, heal the sick, nourish souls, enrich lives, care for animals, and build minds. You have an important goal, and we're thrilled to leverage our blend of data, technology, and award-winning creative to get you there.

We'd love to connect to learn more about your mission and the goals we can help you achieve.
Contact Us!



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