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# The Nonprofit Guide to Personalized Email

A guide for engaging supporters



# Introduction

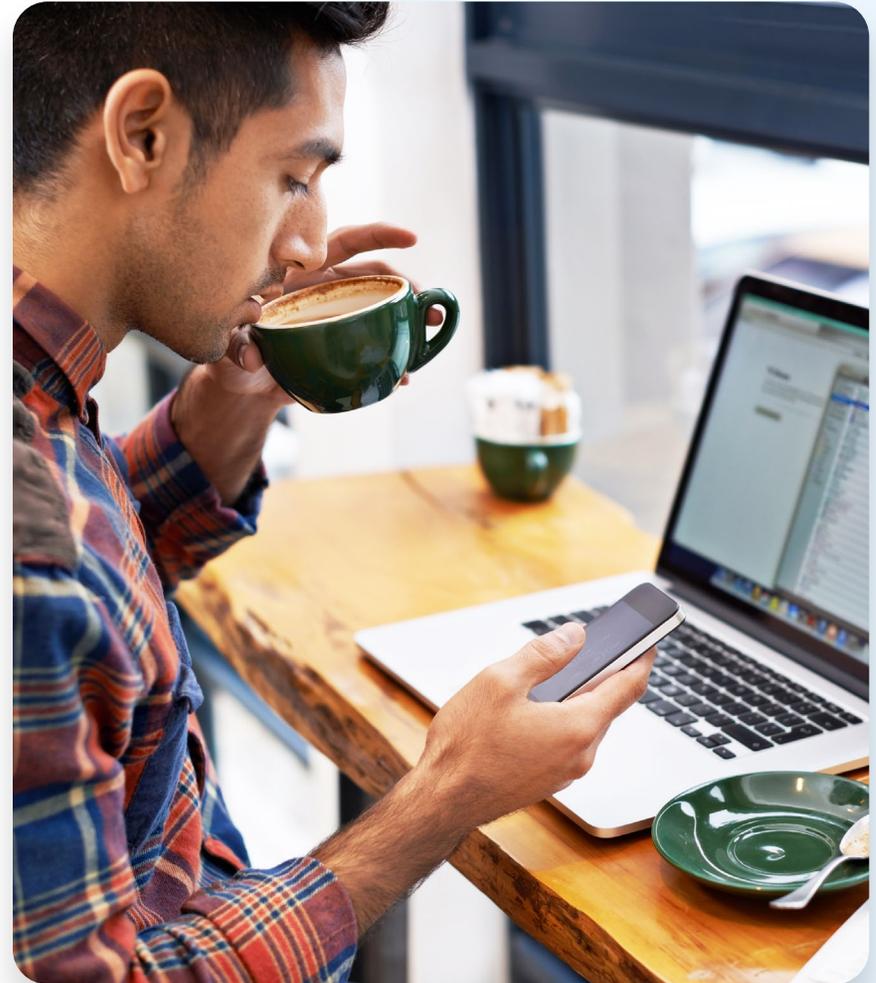
Email is by far the most popular and effective way for nonprofits to engage supporters. But at scale, emails can lose the things that make them personal, human, and authentic. This guide aims to explore how those traits and techniques can be restored and scaled to help nonprofits grow.



# Supporters Expect Personalized Content Because it Feels Authentic

Today's supporters are pretty on-the-go. Most of us have a thousand notifications, emails, offers, and requests in our inboxes and on our phones every day. We're also used to personalization. In the for-profit world, it's the norm to receive emails from big brands that know your name, your age, the last thing you bought, and what you might be interested in buying next. We now expect these types of experiences, and all that personalization has changed our expectations of the nonprofits we support as well.

Personalized content feels more authentic to us – especially when we've had at least one interaction with an organization before. We've given some personal data about ourselves, so in return we expect that we're going to be recognized the next time we interact with that organization. When we don't get that experience, it can feel disingenuous – even though we gave information, the organization still doesn't know who we are.





## Using Marketing Automation to Create (and Scale) Authenticity

So how can nonprofits create that feeling of authenticity when sending emails to thousands of contacts? You have their email address, and you probably also have some other data about them: their name, their home address, maybe even their birthday or age.

But how do you use that information? If you're using a CRM system, then you're already part of the way there. Now you just need to tap into that repository of information and start shaping your emails with it. If sorting through the mountains of data in your CRM feels like a daunting task, what if you could do it at the push of a button? That's where marketing automation comes in.

Marketing automation tools help you automate the manual processes of creating emails, personalizing them, and sending them out to thousands of contacts. And they do it all at top speed – so you can focus more on building those relationships with your supporters.



# What is Dynamic Content?

Now let's go back to that supporter data that you've collected. Marketing Automation tools help you use that data via dynamic content, or, a series of special tags called 'merge tags' that tell the email where in your CRM to pull the data from. When a contact is entered in your CRM, a series of fields are filled out – name, age, address, occupation, and so on – that correspond to the information on your form pages. Dynamic content automatically references those fields to pull in the right information, so that you can send the same email to 5,000 supporters, and each of them will receive one that has their own name in it.

## Using Dynamic Content to Personalize Your Emails

Dynamic content isn't just about adding the name field. You can also start to use it to determine what kind of content resonates best with your supporters. To do this, you can create custom merge tags – also called personalization strings – to pull in different kinds of data from CRM.

**Types of data that you might want to experiment with for custom tags:**



**Area of Interest**



**Birthday**



**Most Recent Donation**



**Location**





**From there, here are some ways that you could use this data in your email:**

- In the subject line – to create an eye-catching header that can cut through a noisy inbox
- In the body of the email – to recommend activities, events, and opportunities to get more involved that pertain to that area of interest
- To thank a supporter for their donation or for volunteering
- To create a ‘local’ email for supporters in different regions

When you're crafting your emails, you can also use dynamic content in the body of the email to personalize your content even more. For example, say Melissa is part of a big group of supporters who live in St. Louis and is interested in women's programs. You could start an email with "Melissa, there are hundreds of women in St. Louis who are returning to work". From there, you could offer her the opportunity to volunteer at a workshop or to make a donation that will benefit the women in her community.

With so many options for dynamic content, you can expand the scope of your emails to include new ways to capture more data that you can use to deepen your relationship with your supporters. Before you know it, you'll be able to grow your audience and keep them engaged, increasing donations, volunteers, and memberships as you go.

