

# How to Integrate New Online Supporters

## Key Learning

Using an email “Welcome Series” to integrate new supporters, volunteers, and donors into your organization will pay big dividends in dollars raised, supporter involvement, and donor passion.

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## Use an Email “Welcome Series” to Integrate New Online Supporters

With more and more of your supporters using the online medium to gather information, take action, and give, your online presence (website, blog, email updates, Facebook page, etc.) has never been more important. The face you show online needs to reflect the wide range of activities that you’re engaged in, and be focused as much as possible on involving your supporters in the daily life of your organization.

The email “Welcome Series” has become a favored method of nonprofit Internet staffers to integrate new supporters, volunteers, and donors that have signed up with the organization online by providing valuable information: their email addresses. Typical supporters sign up via the organization’s website, a signup sheet at a public event, or by opting in to a list development service such as CARE2.com.

You should think of an email Welcome Series as a relationship-building effort, as opposed to a fundraising effort, though fundraising will play a role in good time. Fundraisers call this process “cultivation,” since technically these individuals are “prospective donors.” For this relationship-building effort to succeed, it’s important that it begin as soon as possible, ideally within a week of an individual’s initial registration.

### Welcoming ongoing “organic” additions to your email list

In the case of regular and ongoing – I like to call these organic – updates to your list such as signups via the “email signup widget” on your website, an email Welcome Series will allow you to acknowledge that individual’s action of joining online, welcome her into the organization, and then offer her a practical guide to the organization’s online and offline programs. She has taken the first step in signing up, is interested in learning more, and is open to being educated about the organization’s mission, activities, volunteer opportunities, and (eventually) financial support opportunities. She is also entrusting you with a valuable personal asset: her email address. So it’s important that you treat her in-box with respect. An email Welcome Series allows you to do that.

### Welcoming a large new list of email addresses

In the case of a large, bulk influx of email addresses such as those acquired through a list development service such as CARE2.com, the Welcome Series will need to acknowledge the circumstances of the initial registration. For example, many individuals sign up online as part of an advocacy campaign such as signing a petition, sending a letter to a political or corporate target, or making a small donation as part of a “friendraising” campaign. Here, the Welcome Series could thank the person for taking an action, and then introduce the other programs of the organization that may be of related interest.

## Content in a Welcome Series

The content of an email Welcome Series is as much about tone as it is about the message itself. Think of it as rolling out the welcome mat for a guest in your house. The tone should be personal, should come from an important person in your organization, and should offer a guide to your organization's online and offline programs.

Look at the sample email Welcome Series shown below and you'll get an idea of how you might shape the message week by week. You'll have to fit this content to match your organization's programs and current activities.

## Scheduling an email Welcome Series

An email Welcome Series will be most effective if it can begin within a week of initial registration. In the case of "organic" additions to your email list, your email Welcome Series will be a perpetual process. I recommend that you look into automating this process by working with your email messaging service provider. Convio, for example, can be set up to send an automatic email to any new people who join your email list. This automation will greatly simplify the process of managing an email Welcome Series. Don't forget to regularly update this automated Welcome email so it has the most current information about your organization and its programs.

### Here's a sample email Welcome Series:

1. Within 7 days of registering: "Hello and welcome" message from your Executive Director or Program Director. It lists "5 Ways You Can Help" but is not focused on a fundraising appeal. Item 5, for example, might be the suggestion of donating money. Items 1-4 would be: to volunteer, get involved in our action team, contribute to our blog, etc. Another thing that works well in the first or second Welcome Message is to send a survey to assess their various areas of interest.
2. Seven days later, a more active message: "We need your help with" something — again, not an appeal.
3. Seven days later, another active message, which might be a repeat or follow-up of the previous one, not an appeal.
4. Seven days later, an appeal for financial support.
5. Then move them to the main email file, so they get regular e-newsletters, or any other specialty communications.

## **Integrating new supporters into your regular email communications**

Eventually, you'll need to decide when the Welcome period is over and you can integrate the individual into your regular email communications schedule. In the sample email Welcome Series shown above, I suggest that the optimal time period for integration is one month. Some organizations like to stretch this out longer. It's up to you.

## **When should you ask for financial support?**

The central purpose of an email Welcome Series is not fundraising, but this doesn't prohibit you from asking for financial support. If your organization is in the middle of a critical fundraising appeal for a natural disaster or an important political event, then fundraising may be an important component of your Welcome Series. As suggested by the sample Email Welcome Series shown above, we suggest that the optimal time before asking for financial support is no less than three weeks.

## **Good luck!**

I always get excited when I receive an email Welcome from an organization. It helps me to get a sense for what I'm in store for. Is the Welcome brief and formulaic? Or is it sassy, vibrant, and inviting? Is it sent from some nameless robot, or is it signed by someone interesting along with their smiling face? The email Welcome Series is an important way to make a good first impression. Make the most of it. I'll see you on online!

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| Democracy for America                    | Riverkeeper                    |
| Feingold Senate Committee                | San Francisco AIDS Foundation  |
| Global Exchange                          | Save The Bay                   |
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