TechForward 2022
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Designing a Digital Engagement Ladder

MESSAGE >> AGENCY

Digital impact
for the greater good

Message Agency is a social enterprise that helps nonprofits use technology to enlighten, educate, engage, and enact change.

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Workshop Objectives

After this workshop, you will know how to use data and digital tools to:

- **Segmenting Audiences**: Segment and target your stakeholders

- **Building Personas**: Understand what they need and how they think

- **Defining Conversions**: Define a conversion and why they are useful

- **Designing Engagement Ladders**: Design a ladder to drive audience conversions

- **Develop Content Strategy**: Persuade audiences with content at each touchpoint

- **Evaluating Effectiveness**: Evaluate your success during and after the engagement

"Just because you built it, doesn't mean they'll come."

Consider the Journey

- You have to **persuade audiences to engage you** and plan out the steps for them to take the action you want.

- **It's critical to establish relationships** before expecting behavior change—one ask won't always do it.

- You need to **demonstrate your value over** multiple steps.

- Depending on your relationship with an audience segment, **it may take more steps and more engagement before they act**.

- The **data you already collect** on users is the key to understanding the journey.
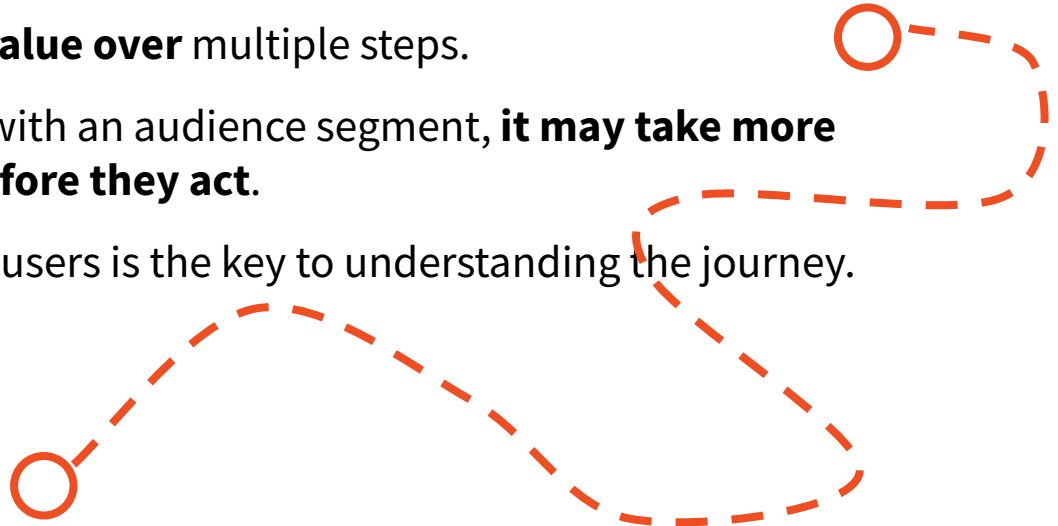
What is an audience journey?

The path an audience member takes to reach your goal.

Engagement Ladder + **Persona** + **Conversion**

What's <u>our</u> audience journey?

A campaign to get lapsed donors to make a donation.

Engagement Ladder + **Persona** + **Conversion**

Client: Juvenile Law Center
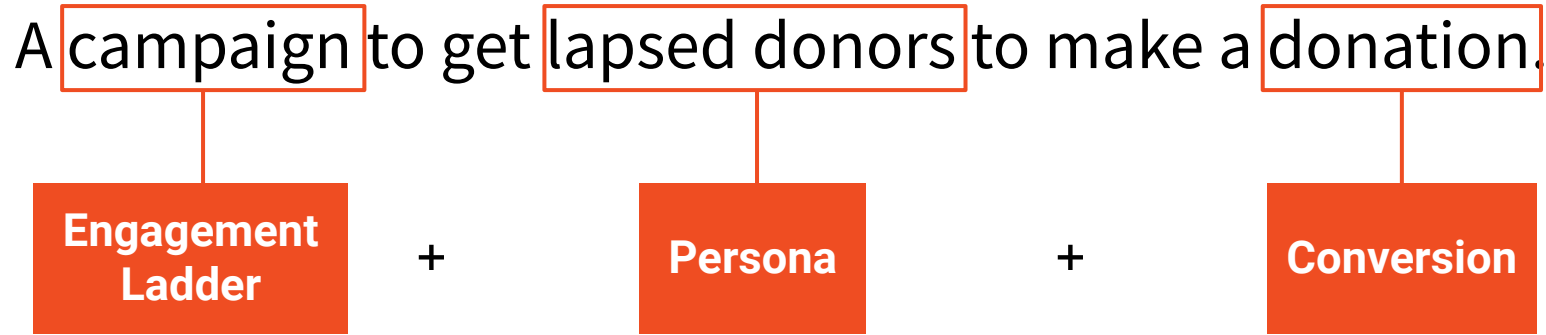
1. Audiences

How do I understand who I want to reach and why?

"From one list should come many."

Audience Segments: What are they?

- It's absolutely crucial to **define, understand, and target** who you need to **reach and engage**.

- The first step is to create **audience segments**; they can be specific to a campaign/activity or applied broadly across your organization.

- Segments are **subgroups of your stakeholders** based on demographics, behavior, or their relationship to your organization.

- They **organize stakeholders into smaller groups** so you can give them what they really want or need.

THE IMPORTANCE OF CRM:

Good data collection strategies can more easily help you segment your contacts in meaningful ways.

Audience Segments: How are they defined?

Consider how to group them using data you have. Do they…

- Have the same relationship to you?

- Have the same demographics or characteristics?

- Need to hear the same distinct message?

- Would be reached through the same channels?

- Have similar behaviors or mindsets relative to the campaign?

- Bring similar things to your organization?
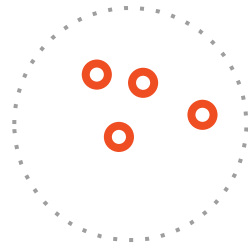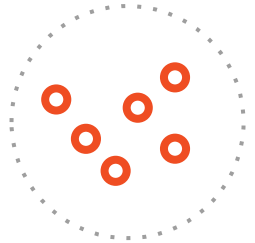
Audience Segments: By Relationship

Segment	Subsegment
Donors	Current Donors
	Lapsed Donors
Alumni	Active
	Disengaged

Audience Segments: By Characteristics

Segment	Subsegment
Lapsed Donors	Major Donors (5K +)
	Mid-Tier Donors (1K - 5K)
	Lower Tier Donors (Under 1k)
Prospective Donors	Aged 21 - 35
	Aged 36 - 50
	Aged 50 +

2. Personas

How do I understand who my audiences are and what will motivate them?

"You are not your audience."

Data helps adjust for cognitive bias

- We are drawn to details that confirm our own existing beliefs.

- We fill in characteristics from stereotypes, generalities, and prior histories where there are gaps in knowledge.

- We think we know what others are thinking.

What is a persona?

- A **profile or character sketch** of someone you need to connect with or serve—their motivations and goals

- Connects an audience to what your organization needs—your **business goals**.

- A tool for **modeling, summarizing, and communicating audience research** to design any product or experience.

- Depicted as a **specific person**, but it isn't a real individual.

- Help designers create experiences for a **specific somebody**, rather than a generic everybody.

Archetype

The

Lapsed Donor

Demographics

Juliana, 62

Juliana is a longtime supporter of the Juvenile Law Center. She is a former corporate attorney based in Philadelphia and clerked for a family law judge during law school. Her past experience working with families has inspired her to support organizations locally and nationally that advocate for the rights of youth and younger adults. She is connected to a large, high-powered community of attorneys and legal professionals as well as other executive-level professionals in the area.

Characteristics

Mindset

Values

- Juliana prioritizes her support for the Juvenile Law Center and attempts to supplement her regular giving with some form of outreach or fundraising amongst her community of colleagues, friends, and family.

- She likes to connect with her family and friends via social media and looks forward to sending them interesting articles or updates from her favorite blogs and publications.

- She values her ability to translate complex legal issues or decisions for the layperson and is excited when she's able to broadcast to individuals outside of the legal community.

Needs

Goals/Needs

- Juliana needs to see the Juvenile Law Center's recent accomplishments prominently featured across the website and in major media publications, including the Juvenile Law Center's acknowledgments in journals and major case decisions.

- She wants statistics and other graphic content related to the Juvenile Law Center's success to share with her social media and personal networks.

- She wants to sign up for the Juvenile Law Center's newsletter and be able to easily peruse the Juvenile Law Center's blog and news content.

Opportunities

Opportunities

- Juliana is an effective advocate and promoter of the Juvenile Law Center's work, whether it be a major accomplishment or an upcoming campaign.

- She can help encourage others within her professional and personal communities to engage with the Juvenile Law Center as donors or regular blog readers / subscribers.

Preferred devices

Behavior

What do they help you do?

- Build Empathy

- Develop Focus

- Communicate and Form Consensus

- Make and Defend Decisions

- Measure Effectiveness

OVERALL:

Helps you focus your design on a specific someone, their needs, and how your goals meet those needs.

3. Conversions

What is a conversion, and why should I define them?

"All paths should lead to a conversion."

Conversions: What are they?

- A **conversion** is when a member of your audience takes a **desired action to fulfill a goal**.

- These actions should **directly relate to your goals** and are **measurable**.

- They represent **Key Performance Indicators** (KPIs)

Goal	Conversion
Re-engage lapsed donors with content	Open E-Newsletters Share posts on social
Increase online donation revenue	Make a donation online
Increase event attendance	Register for an event

Conversions: Why are they important?

- They are the **"what"** related to your campaign's "why" and "how."

- Conversions **translate your goals and KPIs into steps**, content, calls to action, and data collection methods for your campaign.

- They provide a **concrete target** for you to design around.

- They will help you calculate a **Conversion Rate** to determine how effective you were in this campaign.

Conversion Rates

Goal	Conversion	Conversion Rate
Re-engage lapsed donors with our content	Open E-Newsletters	20% open rate (was 10%) = **100% increase**
	Share posts on social	50 new shares/likes/follows (from 100 lapsed donors) = **50% increase**
Increase event attendance	Register for an event	75 (of 100) lapsed donors register for event = **75% conversion**
Increase online donation revenue	Make a donation online	50 new online donations from 100 lapsed donors = **50% conversion**

Conversion Rates: Benchmarking

How do you know if your conversion rate is adequate?

- **Consider progress to goal.**
  Did you achieve the KPI you set out to?

- **Compare with past performance.**
  Did you do better than last year?

- **Compare with industry benchmarks**.
  What does research tell you about how others tend to perform?

Industry Benchmarks vs. Your Own

Both are useful, YOUR data is No. 1

- **Industry benchmarks can:**

    - Get a big picture idea of what success looks like in specific industries

    - What demographic and usage trends there are on platforms

    - Help you set a baseline if your channels are new

- **Your data will:**

    - Give you accurate insights about YOUR audience

    - Provide more realistic baselines to work from

4. Engagement Ladders

How do I design an engagement that drives audience conversions?

"The How"

Engagement Ladder: What is it?

- **An engagement ladder for a campaign**: the series of steps it takes to move a supporter toward a conversion.

- Each rung on the ladder is a progressive action taken by someone, where they **give you more data**, **engage more closely** with you, and become **more invested** in your campaign and organization.

- The goal at the end of the ladder is for the audience to complete a conversion.

- You will likely have **more than one engagement ladder** for the same conversion, each based on an audience/persona.

Engagement Ladder: Why is it important?

- It helps you depict and define exactly how you will convince different audiences to **engage with your campaign and make a conversion**.

- Helps you **gradually build a relationship** with audiences, rather than jump to a cold ask.

- An ask without relationship-building is more likely to lead to rejection or inaction.

- By leading them up the ladder, you **turn casual supporters into donors, volunteers, and advocates**.

Lapsed Donor Engagement

Donation Ask

Donor Event Invite

Share Your Story

Donor Stories

Social Posts

Juliana's Journey
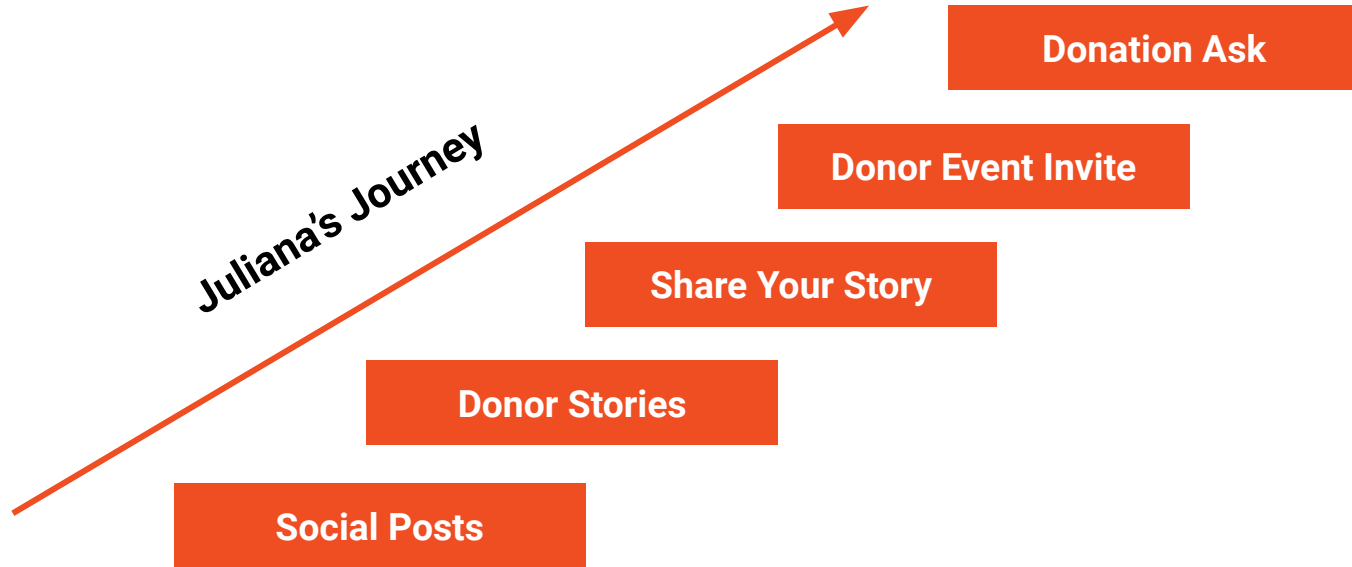
Engagement Ladder: Tips

- Ensure you have a **clear plan behind each rung to track data** and better understand what is motivating your audiences.

- Get creative! Think of unique ways to get people to start engaging.

- Avoid common mistakes:

    - Not being clear that you are deepening their relationship with you.

    - Failing to add value for your supporter. Give back!

    - Not meeting supporters where they are.

5. Content Strategy

How can I create messaging and content that persuades my audiences?

What is content strategy?

- **A plan for getting the right content** to the right people at the right time so they take action.

- It **assigns the values/benefits and proof points** you need to communicate at each step in your **engagement ladder**.

- It will help you **translate your messaging framework into actual copy** that persuades that particular audience.

- The **content you define needs to support/provide more evidence** that communicates the value/benefit.

Lapsed Donor Engagement

Content Strategy

Juliana's Journey

Donation Ask   Follow-up Email / Call

Donor Event Invite   Email Campaign with Invite

Share Your Story   Email Campaign to Solicit Lapsed Donor Videos

Donor Stories   Email Campaign with Donor Videos

Social Posts   Youth Advocate Video Stories

Defining Supporting Content

Audience	Value/Benefit	Proof Points	Supporting Content
Lapsed Donors	• Julia knows her donation helps provide essential advocacy in a field related to her profession. • Julia gets to raise her prominence among colleagues and friends by being an ambassador. • Being courted as part of a community of donors brings her a sense of belonging.	• Her previous gifts enabled JLC to develop a Youth Advocacy Toolkit, which assists youth-serving nonprofits and legal advocates design better programs. • A repeat donation or monthly gift would allow JLC to fund the development of more toolkits.	• **Social Posts: Video Stories about JLC Youth Advocates, their struggles, and their newfound sense of agency.** • **Social Posts. Donor video stories about why they give** • **Email Campaign: Tell us your story / why you give** • **Email Campaign: Invite to donor event about recent activity**

From Strategy to Content: Tips

To transform a content strategy into actual content:

- Make the points you've outlined, but in a compelling way. Refer to the persona to address that segment's perspectives.

- Use different copy / content for different segments.

- Start with why. That's the hook.

- Use simple, conversational language. Short sentences, simple sentence structure.

- Don't bury the ask.

- Use images or video whenever possible. Don't just rely on words.

6. Evaluation

How can I measure success?

"Spend more time analyzing data than tracking it."

Analyzing Your Efforts

Advantages of Campaign Evaluation:

- Assess what elements of the campaign worked—or didn't

- Understand how the target audience responded to the campaign

- Review the effectiveness of the campaign according to your objectives

- Discuss the campaign with key stakeholders

- Provide valuable insight for future campaigns

When? During <u>and</u> After the Campaign

- You've identified KPIs and how you will collect and store the data, but you need to plan how you will **analyze** it.

- You should evaluate your campaign's performance both **during and after the campaign**.

  - Monitoring and measuring mid-stream allows you to make critical changes to your strategy before the campaign ends.

  - You should measure outcomes at every step in your engagement ladder.

  - Thoroughly evaluating your campaign will help you improve performance in your next campaign, as well as gauge success.

Lapsed Donor Engagement

Process Indicators

Juliana's Journey

Donation Ask	Donation # and amounts
Donor Event Invite	Open, Read, Click-Through Rates + Registrations
Share Your Story	Open, Read, Click-Through Rates
Donor Stories	Open, Read, Click-Through Rates
Social Posts	Engagement: Likes / Shares / Follows

Analyzing Your Data

Great news: You don't have to look at absolutely every metric.

Awareness

- Cost-Per-Thousand-Impressions (CPM)
- Impressions
- Reach
- Email open rates
- Website traffic

Engagement

- Cost-Per-Click
- Cost-Per-Like
- Cost-Per-View
- Likes, Shares, Comments
- Profile or website views
- Email CTR
- Email Forwards
- Number of pages visited on website

Conversions

- Cost-Per-Action
- Followers/Page Likes
- Subscribers
- Event registrations
- Donations
- Volunteers
- Google Analytics Goals

Understanding Indicators

- **Outcome Indicators**: Demonstrate whether the campaign produced positive changes in outcomes = **Measuring Your KPIs**

- **Process Indicators**: Provide insight into why a campaign was effective (i.e., what practices, features, or strategies contributed to positive outcomes) = **Measuring Engagement**

Don't just evaluate whether you met your goal. Measure what helped you get there, so you can develop better strategies over time.

Process Indicators: Evaluating Every Step

- In addition to answering big questions and measuring KPIs, **you need to assess every step in your engagement ladder.**

  - Not everything you measure will track to your KPIs.

  - There is opportunity for insight at every touch point.

  - You should measure process indicators multiple times throughout the campaign and change tactics, targets, or content accordingly.

  - A/B Testing is a good example of process evaluation.

  - Try using UTM codes (parameters in your URL) in social posts and emails to provide additional data on user behavior.

A/B Testing: What is it?

- Creating **two different versions** of one piece of content to see which performs better.

  - You can also test same message with different audiences or different approach with same audiences.

- Only change one variable at a time.

- Keep other variables the same: sample size, budget, timeframe, approach.

A/B Testing

100% of Traffic

50% → Version A

50% → Version B
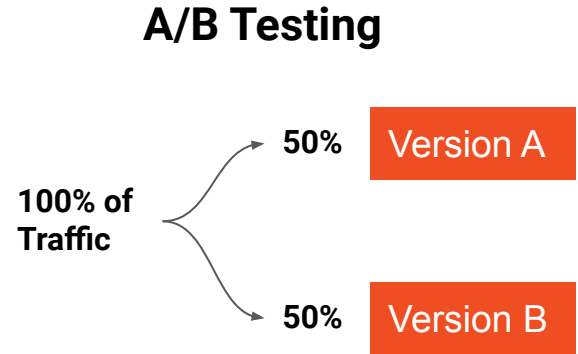
A/B Testing: How do you do it?

- **Pick your variable** to test - independent variable

- **Identify your goal** - dependent variable

- **Create a "control"** (unaltered) and "**challenger**" (altered) version

- **Split your sample** group equally and randomly. Use a subset.

- **Run the test** with an A/B testing tool (Hubspot, Google Analytics Experiments) or DIY

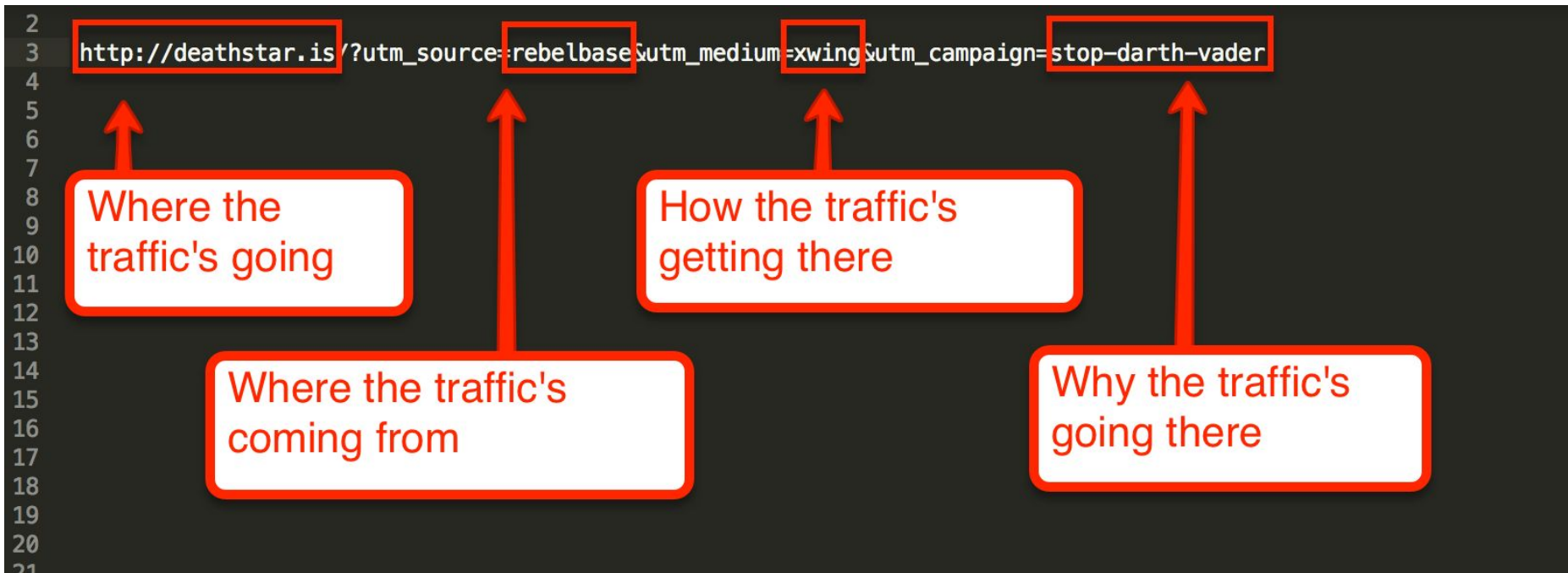- **Wait for the results** and compare!

Get More Data With UTM Codes

- UTM = Urchin Tracking Module

- They're code snippets you attach to your post social posts (and more!) and track activity in Google Analytics

- Why? They enable more advanced tracking

  - Where's the traffic coming from? (source)

  - How is it coming to me? (medium)

  - Why is it coming to me? (campaign)

- You can better understand what content drives the most valuable traffic

Here's a free utm tool: https://utmbuilder.net/

UTM (Urchin Tracking Module) Codes


```
2
3   http://deathstar.is/?utm_source=rebelbase&utm_medium=xwing&utm_campaign=stop-darth-vader
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```

Where the traffic's going

How the traffic's getting there

Where the traffic's coming from

Why the traffic's going there

Optimization and Retrial

Demonstrating that you're learning and adapting = success.

Listen to what your data is saying …. and then act

Low Email Open Rates	**Low Impressions & Reach**	**Stagnant Web Traffic**
● Test subject lines ● Try different send times ● Identify new segmenting opportunities	● Explore different hashtags ● Implement more tagging ● Try different post times	● Identify opportunities to update content ● Promote important items on your homepage

Takeaways & Lessons Learned

- **Relationships are critical to establish** before expecting behavior change—one ask won't do it.

- **Consider the journey.** You need to consider how you will lead your audiences to the desired goal.

- Conversions translate your goals and KPIs into **measurable steps your audiences will take** to reach them.

- Engagement ladders define exactly **how you will deepen relationships to lead audiences** to complete a conversion.

- **Messaging frameworks are always audience-centric.** Tailor your messages to each segment based on who they are, their relationship with you, and what specific action you want them to take.

- Content strategy is a plan for getting **the right content to the right people at the right time** so they take action.

- **Defining the actual supporting content** an audience member will see at different steps along your engagement ladder can **help to develop your copy.**

- **Measure twice**—during a campaign to pivot based on performance and after to evaluate your progress to goal.

Thank you!

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