



# Nonprofit Email Audit Checklist

## TOP PRIORITIES

- ☐ Having a strategy that engages people at the most important times of the donor lifecycle should be the first priority. These top priorities include (in order):
- ☐ **Grow your audience by collecting emails:** You can't send out emails without having supporters opt in. Adding an email signup form to your website will help your organization grow its email list and supporter base. The types of sign up forms include:
  - ☐ Pop-up or fly-out to first time visitors (most effective at collecting emails)
  - ☐ Header or footer embedded form
- ☐ **Triggered emails to new supporters and past donors:** When a contact joins your newsletter list or engages with you for the first time, it's critical that you onboard that supporter. Same goes for when a past donor goes 180 days without financially engaging with you, it's really important to reach back out to keep the relationship alive.
  - ☐ Welcome Series: Anyone who signs up to receive your newsletter should get a series of welcome emails that educates them on your organization.
  - ☐ Re-engagement emails: Emails designed to send to supporters who have donated in the past but have failed to make another donation in the last 90-360 days.
- ☐ **Targeted Newsletter:** Are you sending a general newsletter? If yes:
  - ☐ Are you sending the same content to your entire list? We recommend sending to people who have opted into your newsletter, but also send specific content to specific people so each person's newsletter is personal and relevant to him or her.
  - ☐ How often are you sending? We recommend sending at least once per month.
- ☐ **Are you segmenting your list?** Segmentation allows nonprofits to personalize your outreach by targeting specific people based on behavioral or demographic criteria, as well as better understand your audience. Best practice segments include:
  - ☐ Specific interests
  - ☐ Small Donors

- ☐ Large Donors
  - ☐ New Donors
  - ☐ Repeat Donors who are not automatic recurring donors
  - ☐ Supporters who live in a specific area
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- ☐ **Are you measuring the success of your email?** Measuring the performance of your email will allow you to improve your strategy after each send. There are a number of ways to measure the success of your email strategy.
    - ☐ Opens/Clicks: Measure whether or not your subject lines or content are resonating with your supporters.
    - ☐ Dollars Raised: Measure the amount of money each email generates.
    - ☐ A/B Testing: Testing subject lines and content to ensure you're sending the best email.

## OTHER PRIORITIES

- ☐ **Expanding your audience via Facebook Ads**: Are you showing targeted ads to people who look like your current donors or supporters?
- ☐ **Personalizing emails**: Are you using the name, email address or other dynamic content when crafting emails?
- ☐ **Other types of Segments**:
  - ☐ Supporters who have donated but not attended an event
  - ☐ Supporters who have not opened the last 5 emails (suppression list)