



7 SALESFORCE DATA FIELDS YOU NEED TO BUILD YOUR DONOR BASE



Anita Henestrosa



Sharon Harvey

THANK YOU TO OUR CHAMPION SPONSORS



SERCANTE



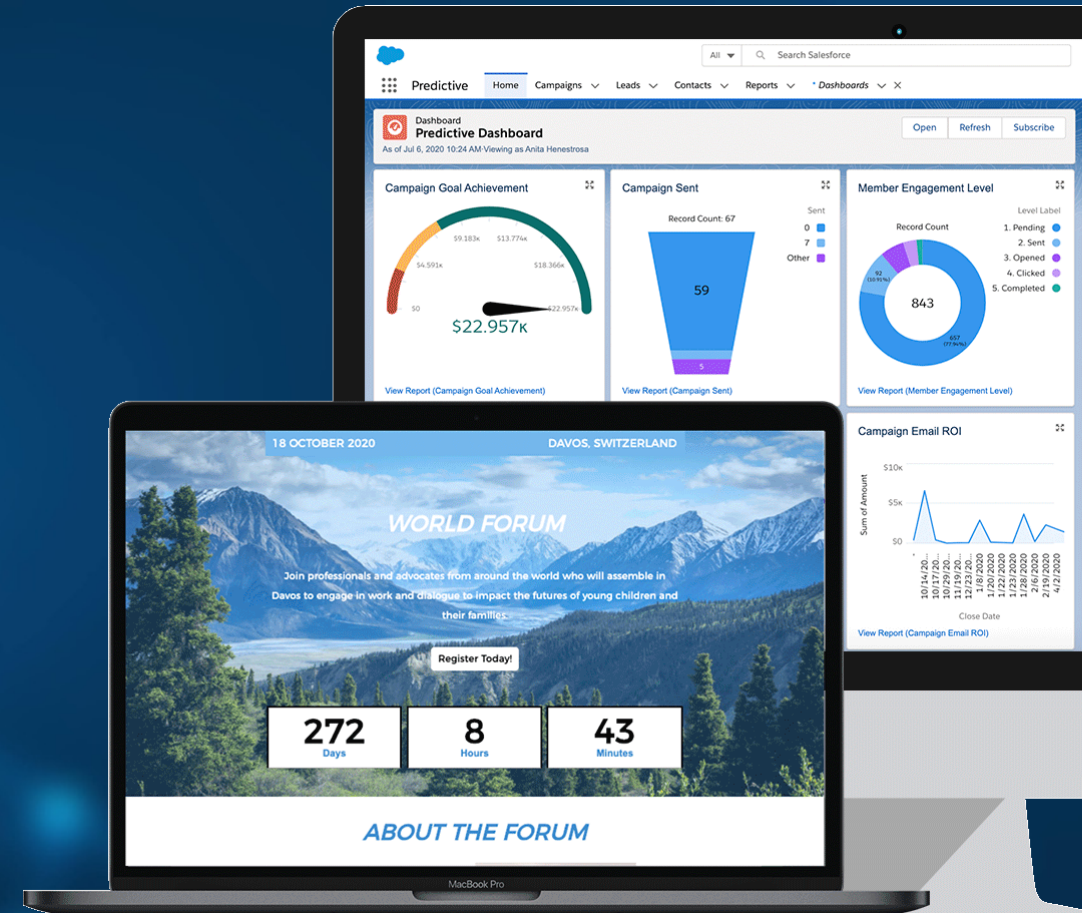
MARKETING AUTOMATION IN SALESFORCE



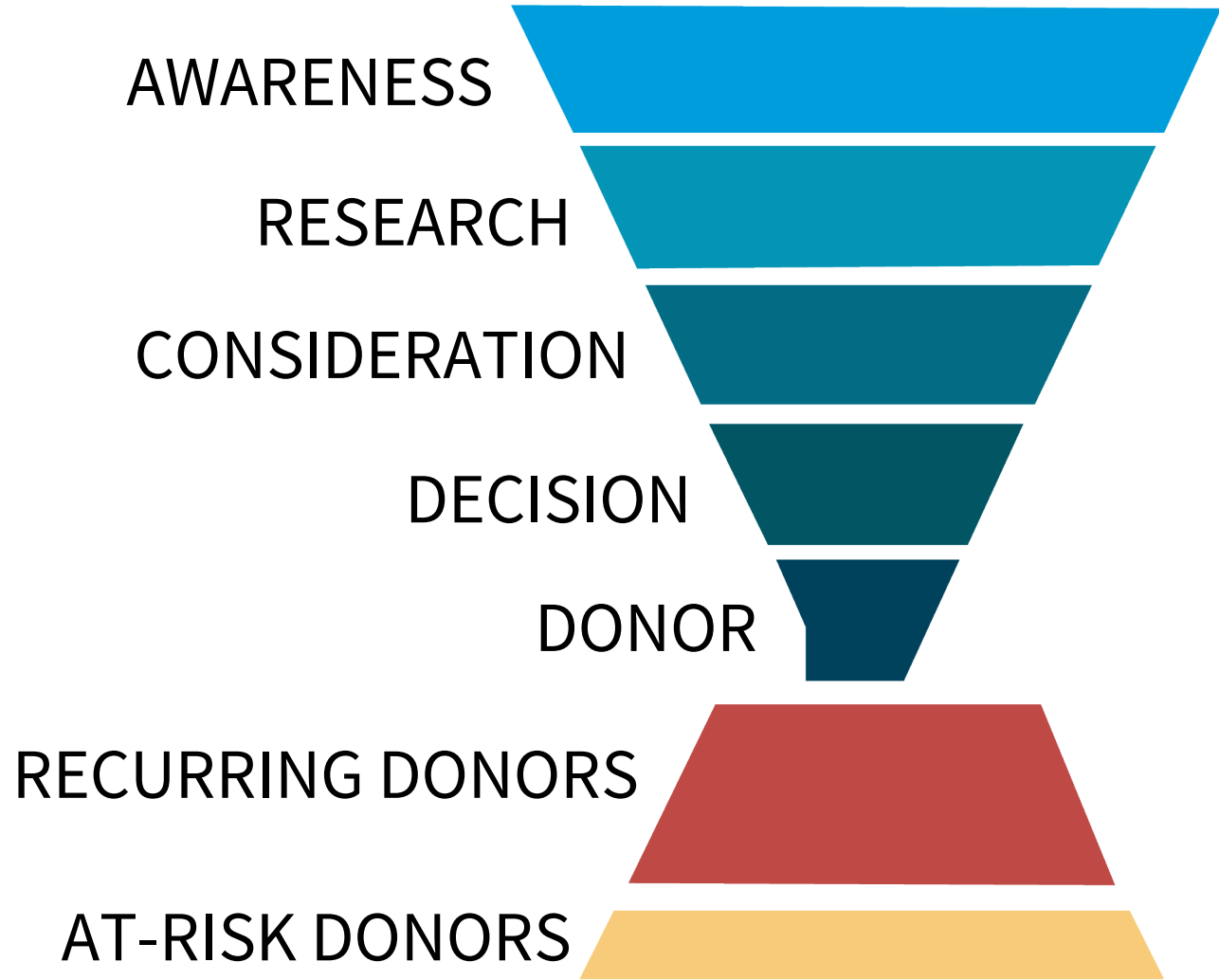
- MASS EMAILS FROM SALESFORCE
- IN-DEPTH SEGMENTATION
- CAMPAIGN AUTOMATION
- BEST IN CLASS EMAIL DELIVERABILITY

INTEGRATIONS:

- EVENTBRITE TO SALESFORCE
- ZOOM WEBINAR TO SALESFORCE



DONOR
JOURNEY



Welcome emails have **4x the open rate** and
a **higher click-through rate** on average.

1

NEWSLETTER

OPT-IN

Custom Field: Checkbox

AWARENESS

Welcome, Arisa!

Mauris quis metus vestibulum, lobortis velit in, fermentum magna. Praesent ornare risus ac ultricies gravida. Vestibulum molestie ultrices maximus.

OUR ACTIVE PROJECTS:

WATER DAM - CHESTERFIELD

Behind the word mountains, far from the countries Vokalia and Consonantia.

[Watch Video](#)



RIVER BANK - CHESTERFIELD

Mauris quis metus vestibulum, lobortis velit in, fermentum magna. Praesent ornare risus ac ultricies gravida. Vestibulum molestie ultrices maximus.

[Learn More](#)

INTERACT WITH YOUR **NEW SUBSCRIBERS**

1 NEWSLETTER OPT-IN

Custom Field: Checkbox

AWARENESS

- ✓ **Instantly send** a message
 - Gives recipient confidence that they have opted-in
 - Direct them to valuable content to get them more engaged
- ✓ Create a **Welcome Email Series**
 - Introduce your organization
 - Learn what recipients are most interested in by reporting on their clicks



74% of marketers believe **personalization** has a strong impact on **advancing customer relationships**.

2

INTERESTS

Custom Field: Picklist or Text

RESEARCH

Surprising facts about Chesterfield's water

Hi Arisa,

Quisque rhoncus sit amet tellus et faucibus. Sed et tempor arcu. Integer ut dolor quis quam semper venenatis a sed nisi. Quisque rhoncus sit amet tellus et faucibus. Sed et tempor arcu. Integer ut dolor quis quam semper venenatis a sed nisi.

10 Surprising Facts



82

Million Gallons
Daily US Domestic Water Use

Surprising facts about Chesterfield's land

Hi Arisa,

Quisque rhoncus sit amet tellus et faucibus. Sed et tempor arcu. Integer ut dolor quis quam semper venenatis a sed nisi. Quisque rhoncus sit amet tellus et faucibus. Sed et tempor arcu. Integer ut dolor quis quam semper venenatis a sed nisi.

10 Surprising Facts



8.2

Million Acres
Protected Land in Chesterfield



TAILOR YOUR CONTENT BASED ON INTEREST

What **project, program or events** is a constituent interested in?

BENEFITS:

Personalized, interest-based content leads to:

- ✓ 50% higher open rates (Yes Lifecycle Marketing)
- ✓ 41% higher unique click rates (Instapage)

DID YOU KNOW?

- ! Sending irrelevant content to the recipient leads to:
 - Lower open rates
 - Higher opt out rates

2

INTERESTS

Custom Field: Picklist or Text

RESEARCH



EMAIL WATER



EMAIL LAND

PREDICTIVE

REACH OUT WHEN YOUR **CONTACT IS ENGAGED**

Contact score is a number that goes up or down based on how contacts interact with your non-profit.

BENEFITS:

- Send a call to action at the right time
- Avoid opt outs and low open rates by sending less to your less engaged constituents

Most Engaged Contacts

First Name	Last Name	Email	Contact Score ↓
Ken	Hill	ken@gmail.com	98
James	Sinner	anita16@predictiveresponse.com	98
Marge	Simpson	anita05@predictiveresponse.com	97

3
CONTACT SCORE

Custom Field via Marketing System

CONSIDERATION

ADJUST COMMUNICATION BASED ON DONOR

4

DONOR LEVEL

Custom Field: Picklist or Text

DONOR

BENEFITS:

- Donors respond to CTAs that match their previous giving patterns.
- Allows you to include appropriate thanks for previous support.



ADJUST COMMUNICATION BASED ON DONOR

4

DONOR LEVEL

Custom Field: Picklist or Text

DONOR

- Communication Type
- Event Invitation
- Content



74% of event attendees are more likely to **donate**
after an event.

5

EVENTS
ATTENDED

Field: Campaign Member Status

DONOR

eventbrite

Water: Tips on drinking clean water



1 x Ticket
Order total: Free

Friday, February 12, 2021 from 7:00 PM to 10:00 PM (PST)
Add to [Google](#) · [Outlook](#) · [iCal](#) · [Yahoo](#)

ADD EVENTS DATA INTO SALESFORCE

5

EVENTS

ATTENDED

Field: Campaign Member Status

HOW:

- 1. Manual uploads
- 2. Event Management Integration: Eventbrite, Fonteva, Cvent
- 3. Third party connectors: Zapier, iAutomate

BENEFITS:

- ✓ Attendees are your most engaged constituents
- ✓ Invite attendees to similar events in the future



Eventbrite Fusion

DONOR

6

RENEWAL DATE

Custom Field: Date

RECURRING DONOR

The average **recurring donor** will give 42% more in one year than those who give one-time gifts.

The average recapture rate of **lapsed donors** is 5%.

TRACK DONOR'S RENEWAL DATE

BENEFITS:

- Increase your renewals

TIPS:

- Make the renewal process easy- reduce the clicks needed
- Trigger outreach based on each donor's expiration date to ask for donation at the right time

6

RENEWAL DATE

Custom Field: Date

RECURRING DONOR

Predictive Home Campaigns Leads Contacts Reports

Campaign Membership E-Renewals

View Campaign Hierarchy Edit Delete Change Owner Printable View

CampaignFlow (1) Campaign Mem... (10+) Email Editions (2) Zoom Registrations (0) Click Throughs (0) Engagement Activiti... (0) Email ROI (0) Web Page ROI (0)

Related Details

CampaignFlow (1)

1 item · Updated a few seconds ago

Name	Active	Description	Existing Lead/Con...	New Lead/Contact	Change Status	Schedule Next Run
1 Add all members with membership expiring in less than 30 days	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

[View All](#)

Email Editions (3)

3 items · Updated a few seconds ago

Name	Active	Edit	Start Date	End Date	Subject	Sent	Opened	Clicked	Completed
1 Edition 1: Membership Renewal	<input checked="" type="checkbox"/>	Edit	2/27/2020	2/17/2026	Your Membership is Expiring in ...	0	1	0	0
2 Edition 2: Membership Renewal Remin...	<input checked="" type="checkbox"/>	Edit	2/27/2020	2/17/2026	It's not too late to renew.	0	0	0	0
3 Edition 3: How your membership has ...	<input type="checkbox"/>	Edit	1/1/2018	1/1/2040	How your membership has ma...	0	0	0	0

[View All](#)

The average recapture rate of **lapsed donors** is 5%.

7

LAST DONATION

Custom Field: Date

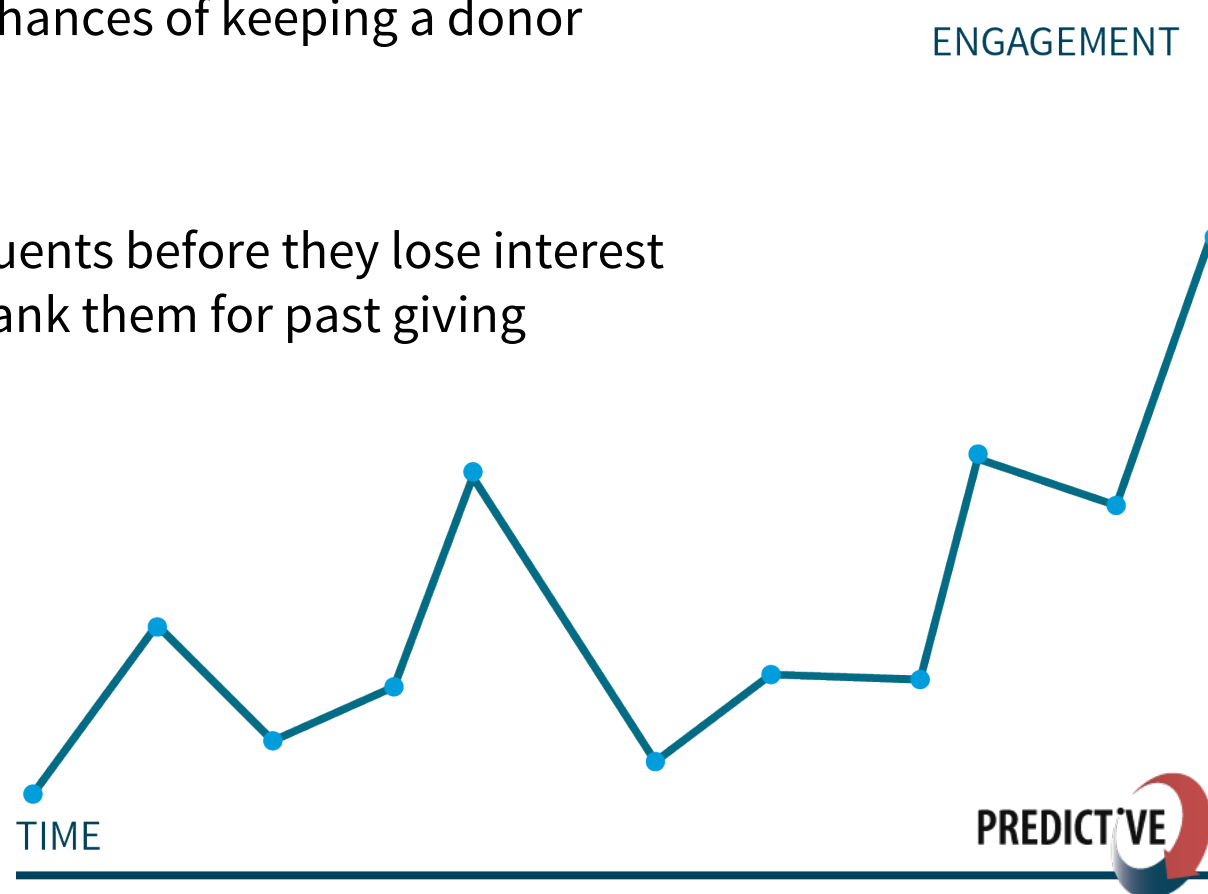
AT-RISK DONOR

BENEFITS:

- Increase your chances of keeping a donor

TIPS:

- Engage constituents before they lose interest
- Remind and thank them for past giving



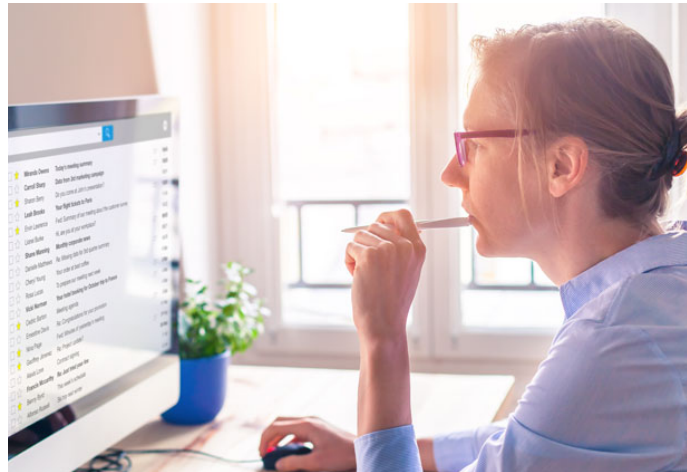
RESOURCES

www.predictiveresponse.com/npdreamin

30+ EMAIL SEGMENTATION IDEAS



HOW TO AVOID YOUR SALESFORCE EMAILS GOING TO SPAM



HOW YOU CAN LEVERAGE EVENTS DATA IN SALESFORCE



CONTACT US

www.predictiveresponse.com

Anita Henestrosa
anita@predictive.cc
415 228-6903 x702

Thank you for coming



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SALESFORCE DATA FIELDS
THAT YOU NEED TO
BUILD YOUR DONOR BASE