Sustaining Donor Series Setup

**Kit Contents**

This kit contains everything you need to create an automated (triggered) sustaining donor stewardship series:

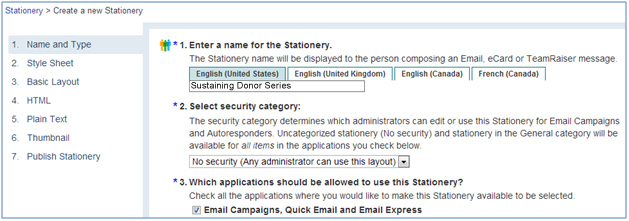
* PSD files for you to customize placeholder images with your own images
* Complete html files for
  + Stationary (2 options)
  + Four email messages and two optional layout templates
    - 1 month message
    - 3 month message
    - 6 month message
    - 10 month message
    - 2 templates formatted for larger images
  + Newsletter template (optional)

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| **Prepare Your Images** |

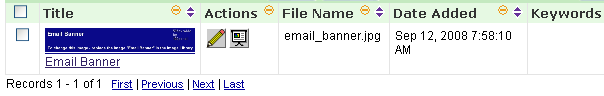
1. In the “Sustaining Stewardship Email (Triggered or Standard) “ folder click to open the “design files” folder and begin customizing each of the PSD files to your desired image while still using the same style and naming configuration using Adobe Photoshop (Preferred) or Gimp (Free download at http://www.gimp.org/) photo editing software.
2. Update the **sustaining\_donor\_series\_stationary\_option2\_banner.psd** with your organizations logo, headline and branding colors or just use the size to create your own unique banner. Save the graphic as a .PNG file.
3. Make sure you go through each PSD file and save them as PNG files with the same name as the images in the “images” folder. This will eliminate your requirement to update the image source URL.
4. OPTIONAL: This kit has templates for a “large image” and “X-large image” design. You don’t have to use these but they will work better for helping you tell your story.
5. Upload the following images to your image library:  
   

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| **Stationery**  **Stationary Template: sustaining\_donor\_series\_stationery (2 options: banner header or logo-only header)** |

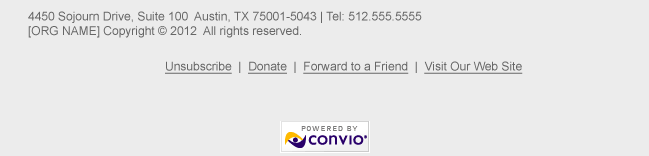
1. Create new stationery using the name convention, “Sustaining Donor Series”.



1. Depending on the stationary option you choose, upload items like your logo and email banner to the image library



1. Adjust address, colors, and other elements in the stationery footer.



Here is a sample of your stationary:



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| **Campaign**  **Content Template: sustaining\_donor\_series\_content (four messages)** |

1. Create a new email campaign, “Sustaining Donor Series”. Be sure to enable web viewing.



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| **Social Share Page Setup for Message 3 (6 Month Email)** |

For your 6-month email we have recommended that you encourage your sustaining donors to share the news about their monthly commitment to their contacts via Facebook and/or Twitter. The following steps will help you setup a page that you can link to in the body of the email so when a donor clicks to share it will drive their contacts to an information page about your organization and about becoming a monthly donor.

1. Login to your LOM admin site
2. Create a new Pagebuilder page and name it “sustaining\_social\_share” and configure it to use any wrapper or CSS associated with your sustaining giving program
3. Open the file **Sustaining Stewardship Email (Triggered or Standard) 🡪 html 🡪** sustaining\_stewardship\_social\_page.html in a .txt or html editor
4. Copy all of the code and paste it into your html editor in LOM
5. Update the copy, links and images to match your messaging and branding
6. Pay special attention to the meta data on this page. This is what Facebook will use to force the image and/or messaging if your pagewrapper doesn’t already have meta data
7. Once your page is done, save and publish. Below is an example of the starting point we have provided:



1. When you edit your “msg3\_6-month” email code, pay special attention to the social sharing links. You will need to update the shared text for the Facebook link (<http://www.facebook.com/sharer.php?u=http://customer.convio.com/site/PageNavigator/sustaining_social_share.html&amp;t=I+love+this+org+and+know+you+will+too>!) and the Twitter link (<http://www.twitter.com/home?status=I+love+this+org+and+know+you+will+too!+http://customer.convio.com/site/PageNavigator/sustaining_social_share.html>). We didn’t shorten the URLs so you could see them in the link but we recommend that you create a bit.ly or some other shortened URL for this code

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| **Email Setup** |

We have provided you html templates for the 4 messages. We’ve also included two layout options with larger primary image spaces. Each template includes some recommended sample copy, S-tags that will render sustaining gift information and image placeholders for you to replace with your images with the same name. To build an email use the following steps:

1. Click the “Manage” link to enter your Sustaining Donor Series campaign
2. Click the “Create a new message” button
3. Name your message “Sustaining Donor Series – 1 Month” and enter a description
4. Choose a message type. We recommend creating a “Sustaining Stewardship” message type
5. You shouldn’t need to configure any other options on this page so click “Next”
6. On the “Envelope” page enter the “sender” name and email address and the subject line. Feel free to personalize your subject line. Click “Next”
7. On the Stationary page, choose the stationary you created for this email series and click “Next”
8. Now go to your kit folder to the Sustaining Stewardship Email (Triggered or Standard) 🡪 html (folder) 🡪 Open the file “sustaining\_stewardship\_msg1\_1-month” in an html editor like Dreamweaver and copy all of the html code
9. Paste your html code into the html editor Luminate Online. If you named the images the same and uploaded them correctly to your Image Library then you should be fine here with no edits. Click “Next”
10. Convert the html version to the plain-text version and click “Next”
11. Send yourself a test using the quick test method to confirm the email looks like you want. Make any necessary edits before you begin sending fully-functional tests to your reviewer group.   
      
    ***TESTING TIP:*** *To fully examine the content of your sustaining donor series emails we recommend that you create a “Sustaining Donor Series Test Group” with people who have records in your Constituent 360 with sustaining gifts. You can add sustaining gifts to your test accounts via the offline method. Simply use the “4111 1111 1111 1111” test method to create “dummy” sustaining gifts. Once you create these test transactions, simply create a query with an email filter that will include the records of those with test sustaining gifts and use the results to create your testing Group.*
12. **OPTIONAL:** In each email template we have provided an area for you to include reusable Pagebuilder content. This is handy in a recurring email so you can always promote something currently happening at your organization. The S51 element is already included. All you need to do is create a reusable Pagebuilder page with a width no wider than 560px wide. Once your Pagebuilder page is published, add the name of your Pagebuilder page to the [[S51:reus\_pagename]] syntax.   
      
    To remove this element from your emails, simply look at the source code and scroll to the bottom and delete the code highlighted below:  
      
     [Organization Name]</p></td>

</tr>

<tr>

<td valign="top">[[s51:reusable Pagebuilder page name]]</td>

</tr>

<!-- END content -->

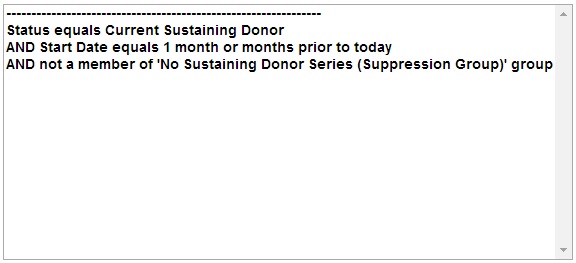
1. Once complete, approve your message
2. Repeat the above steps for emails 2, 3 and 4 and approve each

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| **Social Share Page Setup for Message 3 (6 Month Email)** |

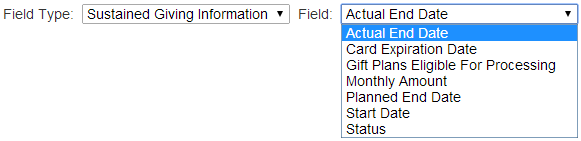
For your 6-month email we have recommended that you encourage your sustaining donors to share the news about their monthly commitment to their contacts via Facebook and/or Twitter. The following steps will help you setup a page that you can link to in the body of the email so when a donor clicks to share it will drive their contacts to an information page about your organization and about becoming a monthly donor.

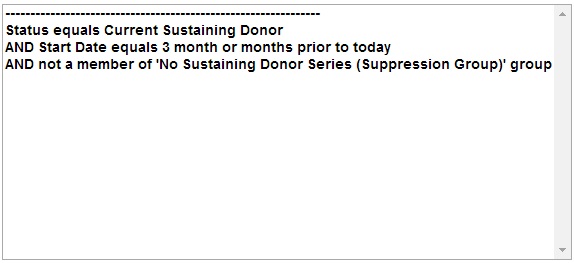
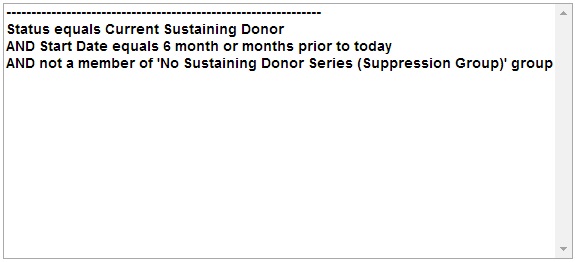
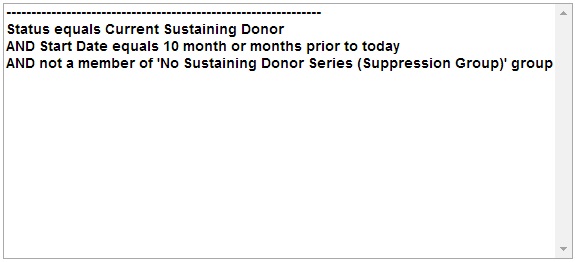
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4. Copy all of the code and paste it into your html editor in LOM
5. Update the copy, links and images to match your messaging and branding
6. Pay special attention to the meta data on this page. This is what Facebook will use to force the image and/or messaging if your pagewrapper doesn’t already have meta data
7. Once your page is done, save and publish

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| **Queries & Groups Setup** |

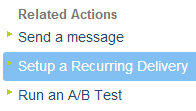
1. Go to Groups and create a new group and title it “No Sustaining Donor Series (Suppression Group)”. This group could be used in the future to suppress new online donor constituents who are uploaded or who you do not want to receive this email donor series message. To suppress a constituent from the sustaining donor series simply add them to this group.
2. Go to Queries and create a new query named “Sustaining Donor Series – 1 Month” with the following parameters. Make sure you add a “Sustaining Donor” status filter. This will suppress monthly donors who cancelled their sustaining gift or gifts that have failed/lapsed since the donor joined a sustaining gift program:  
   

If you ***DO NOT*** see the Sustaining Gift filter options below in your query configuration, you’ll need to contact Support and ask them to activate all of your Sustaining Gift options in Database Configuration – Sustaining Gifts setup.



1. ***IMPORTANT!*** You need to consider any Groups, donor types, or other sustaining program donor groups that you do not want to receive this email series. An example would be a TeamRaiser sustaining donor, program-specific or general sustaining donor (some orgs have a separate Sustaining Donor Series for each sustaining giving opportunity). To suppress these types of sustaining donors, simply add the specific Group to include or suppress.
2. Hit Save, then Run Query. On the next page click Use Query and create a group named “Sustaining Donor Series – [Message] and associate it with this query.
3. Set the group to rebuild daily.
4. Repeat steps 2, 3, 4 and 5 with a new query for each email. Use this logic:   
     
   3 Month Email Query  
     
     
     
   6 Month Email Query  
     
     
   10 Month Email Query  
   

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| **Recurring Email Setup** |

1. Go to “Messages” tab and click the “Setup a Recurring Delivery” link in the left-column  
   
2. Choose “Setup” for the email you want to configure the recurring send
3. Set the date for your recurring send to begin. If your email is ready then choose the current date
4. For the interval choose to send the email “daily.” If there is no one to send to on any day the email will not generate a send
5. Choose the “until” date to be the farthest away date you can set
6. Choose the “Send a Copy” option to enable the same sustaining donor series to be sent again if/when a sustaining donor begins a new sustaining commitment or cancels and comes back as a sustainer at a later date. If not checked, a new sustaining donor or a sustaining donor to a new sustaining campaign will only receive each email their first time through and not subsequent times
7. Click “Next”
8. Configure your target audience Group and suppression Group for that specific email. Review the send configuration and click “Next” and then “Enable” the recurring send. You’re all set!
9. Repeat the above steps for each email
10. You’re all done!