



Hi Rick,

I mentioned two weeks ago we would dive a bit deeper into two of the suggested emails in our welcome series. I'll cover those in a moment, but a question came back after last weeks tip about how to tackle all these new emails. **The answer is automation!**

Now being able to pull that off takes a good plan, and an even better CRM that is integrated with your email platform or that actually includes an email platform as a module (think Virtuous, Funraise, Salesforce, and I'm sure others). If you'd like to discuss more specifics around how to automate your welcome series, feel free to give me a call.

Now about those two emails!

The Content Offer email.

One of the ways you can further endear new partner(s) and perhaps at the same time demonstrate competency comes by offering to send them some actual ministry aligned content piece. Two keys: 1) This is an offer. Meaning they have to respond to receive it. Reply back, sign up for our newsletter. Think handout, prayer card, small (very small) booklet. Keep in mind the main purpose of this isn't meant as a gift. I'm all for giving partners a gift, but that's not really the purpose in this particular strategy.

Again, this could be as simple as something like a Friday Fragments book, but that's expensive and the intent here is that's it's more than just a gift. Ideally, and certainly more cost effective would be a small "document" that comes from your chapter. 10 tips for parenting...5 warning signs your teen is struggling...A prayer card for the refrigerator mounted on a magnet. [See the sample and more ideas.](#)

The Survey Email

We believe that honest and honorable relationships are critical to our philosophy of development. A part of that carries with it a high desire and design for engagement. Using a simple and straight forward survey in our email welcome series demonstrates our commitment to truly getting to know our partners and since this particular email comes to them within the first few weeks of their first gift, you are establishing your commitment to that right away.

The survey is not 5 pages. It's not the US Census. In fact, it's probably shouldn't be any more than 3-5 questions, not including asking for complete profile data (phone, email, addresses, etc.) Make sure they can answer your questions with a multiple choice response, followed by an optional free form.

The idea is to let them give you critical data we rarely have, with minimal burden, and in fact, lots of people appreciate the attempt. Psychologically, letting them just respond to the multiple choice check box gets them started and then some will go ahead and give you even more data in the freeform area. [For an example of a Welcome Series survey, click here.](#)

Questions? Want some help or more details. Allow me the privilege to assist you. Just hit reply. I'd love to talk more.

Passionately,

Rick

GOT PLANS?? Giving Tuesday is now 43 days away and Dec. 31st is 68 days away. Do you have your written campaign plans and major donor communication plans in place? I've assembled a 17 email strategy (you don't have to use all 17) that will help you maximize your Giving Tuesday results, your End of Year results and make sure all your communication pieces and appointment scripts are aligned. [Want some help?](#)

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