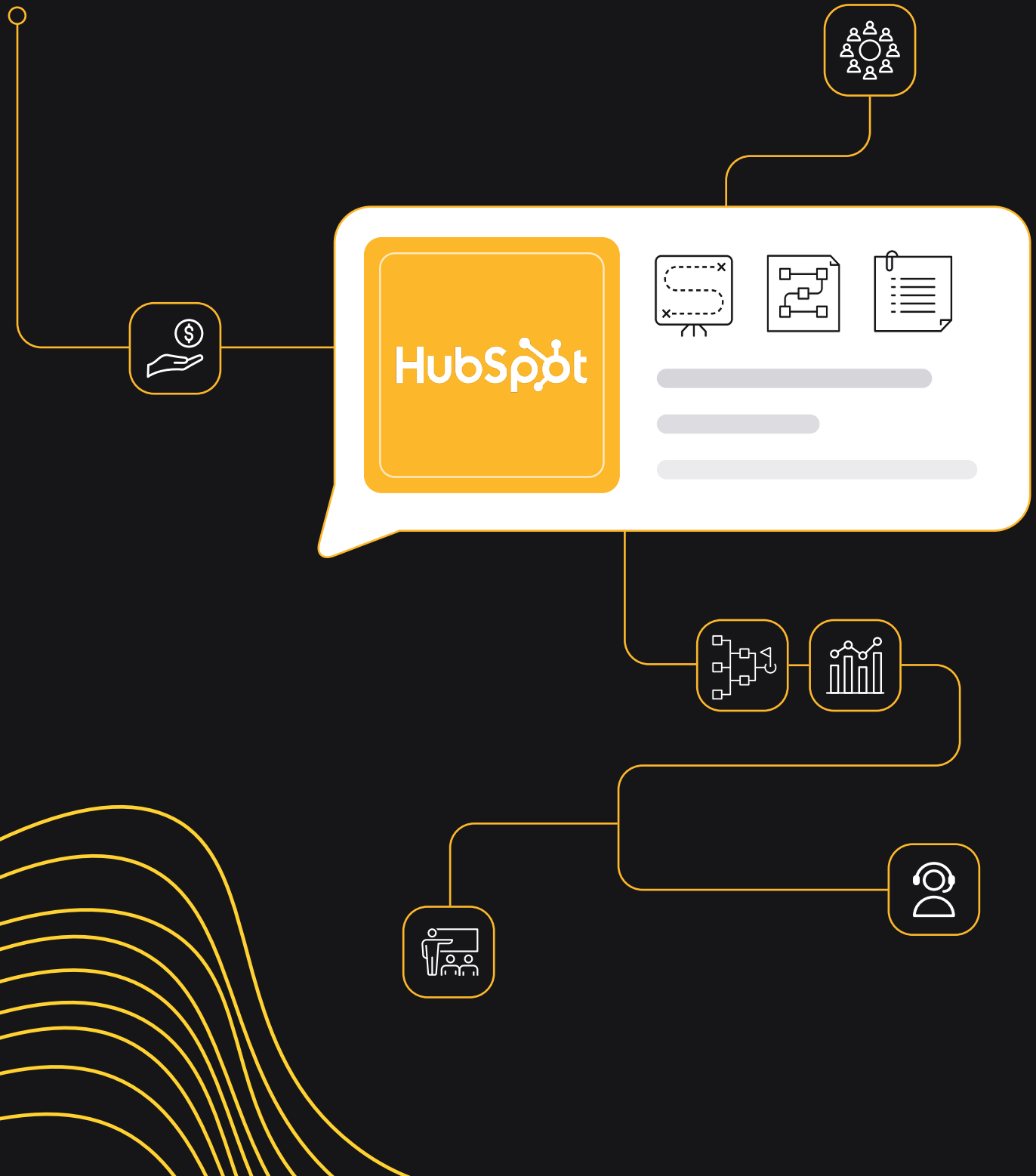


Managing a Fundraising Campaign with HubSpot



Introduction

When it comes to launching a fundraising campaign, there are countless reasons why nonprofits would want to consider using an all-in-one platform as opposed to trying to cobble together multiple separate tools. In this section, you will learn how to launch and manage fundraising campaigns through the HubSpot platform.

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Tools for Fundraising and Engagement

As the cornerstone of any successful nonprofit organization, fundraising is essential for your tech stack to address. That means being able to take a multi-pronged approach to soliciting donations and nurturing donors, including accepting and processing donations, issuing thank you letters and tax receipts, cultivating donors beyond an initial gift, and in general, delighting those who support your organization with a personalized experience of your nonprofit's programs, content, and impact whenever possible

HubSpot has many features that lay the foundation for these essential fundraising behaviors. Take a look at the following suggested features that can guide your fundraising process while saving your development and marketing teams valuable time and energy.



Email Automation

Emails are a primary means of reaching potential donors. HubSpot's email tools enable you to both create and automate emails leveraging both workflows and sequences.

In the email builder, you can create drag-and-drop emails or HTML emails. Then, you can add these emails to workflows. Because HubSpot has made email & email automation part of its core functionality, you're able to easily reference existing data stored in HubSpot CRM to dynamically improve your email performance.

Workflows automate email sends for various campaigns and increase donor engagement. Choose criteria for targeting contacts (such as filling out a form or living in a certain area) and use them to "trigger an enrollment." Once enrolled, a contact will receive the sequence of emails you mapped out in the workflow.

This saves you time having to manually send individual emails AND ensures that your donors experience regular outreach.



Donations with Zaybra

Aptitude 8 is committed to helping all kinds of organizations thrive on HubSpot. That's why A8 Labs created Zaybra, the only true integrator for HubSpot and Stripe.

This app makes it easy for your donors to contribute to your organization through HubSpot's system. And since it's fully integrated, you can also use the data Zaybra gathers to power other tools in your HubSpot instance.

Many other nonprofits choose Zaybra because it creates a safe and secure platform where volunteers can edit and access donation records on both Stripe & HubSpot simultaneously via one-platform. Eliminating the possibility for mismatched data due to manual updating of contact records between two platforms. Also, donation links can be created for processing donations over the phone or via email at the click of a button using HubSpot's easy to understand UI.

Most importantly, integrating Stripe into HubSpot means highly-customizable reporting capability to track and measure the totality of all your donations as well as the history of each donor.

Tools for Fundraising and Engagement (cont.)



Social Media

Social media, the crux of so much interaction for many nonprofits—whether it be on LinkedIn, Facebook, Twitter, Instagram, or TikTok—offers a huge opportunity for marketing and fundraising teams to sync on how to best interact with supporters. We often hear that marketing and fundraising teams are frustrated by tools that silo social media engagement from their donor databases, and that having all interactions documented in one CRM would be a game-changer for nonprofits.

Showing donors and volunteers alike that the organization's teams are working together across all digital platforms should be easy. HubSpot's well-rounded social media tools mean a boosted online presence, managing multiple accounts in one place, and streamlined social reporting.

Using HubSpot's social tools, you can schedule posts ahead of time. This means more organization – and more posts. You can also associate posts with a campaign. This makes tracking your social strategy as part of a larger marketing campaign easy.



Custom Landing Pages

Create specific landing pages for specific campaigns to extend your fundraising efforts. HubSpot landing pages are built on customizable templates that can even be cloned for consistency.

Fundraising events, special donation campaigns and more can have their own pages quickly and easily without the need for any programming knowledge. With this level of customization, your ability to increase tailored messaging per each campaign you launch has never been easier.

Whether you choose to test out our HTML and CSS chops or you would prefer to use a landing page template from the marketplace, it has never been easier for you and your team to spin up new landing pages.



Audience Segmentation

One problem we often help other Nonprofit organizations solve is treating all donors, supporters, volunteers, and new contacts as a single audience rather than tailoring messages and calls to action to the interests and needs that folks have expressed in the past.

To better understand your audience, your team can use HubSpot's tools for segmentation. Break contacts into groups such as major donors, monthly donors, one-time donors, etc with HubSpot's built in persona functionality.

Start by creating personas for each of your donor segments using the persona tool/contact property. Then you can tailor your messaging so it resonates with each persona – and hopefully results in more donations!

Easy Donor Management

Keeping track of your current and past donors is no easy feat. HubSpot's tools are a one-stop-shop for handling donor records that combines the best parts of a CMS and a CRM.



Document Management

Ever find yourself wading through piles of digital mess just to find one asset? It's a pretty common problem that can be simply solved with better document organization.

HubSpot's file manager houses all your digital assets in one place. You can create a library where your team can easily access your documents for later use. For example, you can track document views, add attachments to your emails and determine which documents are generating the most donations.



Meeting Scheduling

Nonprofit organizations such as yours work hard, and time can be your most valuable resource.

One question we often get is "can HubSpot meeting links replace Calendly?" and the answer is, yes! Using a HubSpot meeting link, you can easily embed your meeting link into your assets, use meetings as triggers for other activities & keep an eye on how many meetings are necessary to get a sizable donation.

Being able to track this can be an incredibly helpful tool for your major gifts program.



Email & Call Tracking

HubSpot's email and call tracking features are usually used to track sales rep activity, but they're also perfect for understanding your donation funnel.

At a glance, your organization can understand how many calls are being made to your donor base in order to hit your fundraising goals. You can also see which emails are performing the best and which need to be updated or removed.



Moves Management

For large donations/partnerships, track where you are in the donation process with HubSpot's deal funnels. Are they still a prospect? Has a donation already been made? Will it be recurring?

This is especially helpful for teams that struggle with any sort of technical reporting - by setting up a deal funnel & leveraging the prebaked reports, you can automatically generate an accurate picture of how a campaign is performing on both a monthly and quarterly basis.

Now, you can easily analyze the answers to the questions above with pipeline reports to improve your fundraising strategies.



Fully Integrated CRM

Many nonprofits don't realize that HubSpot's CRM can be customized to nonprofit needs. You can generate organization specific data and store it in a custom object. HubSpot's fully-integrated CRM makes it simple to keep, manage, and store reference information about all of your specific donors.

Forms and workflows can assign properties to various contacts, and you can learn more about your current and potential donors than ever before. Plus, the system is designed so information is incredibly easy to access, search, and understand.

Improve Your Digital Experience

Having a strong digital presence can improve your visibility online. More visibility leads to more interest, and more interest leads to more donations. HubSpot's many content-related features can strengthen your digital footprint and bring in more donors.



CMS-hosted Website

HubSpot understands the importance of the website experience - especially as it relates to nonprofits. With CMS Hub, you can leverage all of the data you have in HubSpot to create a dynamic website that reflects what each visitor wants to see. Create an interactive & impactful website without having to write one string of code.

Better yet, you can even capture key information without using CMS Hub. For example, if you are one of the many organizations using Wordpress, you can leverage the Wordpress integration with HubSpot for donor management, email and marketing automation, live chat, pop up forms, analytics and much more!

So, even if you are happy with your current website, you can still take advantage of the HubSpot platform and extend all of the great features HubSpot has to offer.



Live Chat

Quickly answer questions from current or prospective donors right from HubSpot.

Because HubSpot live chat is built into the HubSpot platform, you're able to take advantage of the rest of the data that lives in your database! For example, if you have a returning donor, you can thank them for their previous donation to a specific campaign & offer them similar new campaigns they might be interested in supporting!

Your team can easily access this level of personalization without using any code or building an overly complex decision tree - making your ability to create an impactful donor experience that much easier.



Content and SEO Management

Build your authority in search with tools that help you plan your SEO strategy, optimize your content, and measure real return on investment.

Easily host your blog and other content so your donors can learn more about your organization & what they're supporting. HubSpot's blog tools include SEO checkers and metadata editing that will help your content rank higher on search engine results pages.

As an added bonus, HubSpot's SEO tools are integrated with all our content tools, so you never miss an optimization opportunity. This will help you understand how to optimize your content for search, plan your content strategy and build search authority all in one convenient location. HubSpot's content strategy tool makes it easy to discover and rank for the topics that matter to you and your customers.

Even better, you will see data from Google that can be used to inform your SEO strategy when you integrate Google Search Console with HubSpot. Metrics like total impressions, average position, and clickthrough rate will tell you exactly where your content stands in Google's search results so you can lean into what's working, and take steps to improve what isn't.

Prove Your Results

All nonprofits recognize the importance of reporting their successes to their donors. But did you know that reporting on your campaigns can lead to even higher fundraising numbers? And even more impressed donors?

HubSpot reporting tracks your campaign success, giving you the information you need to hit your goals.



Attribution

Leveraging campaign tracking in HubSpot, you can see which specific activities are driving the most donations. Are your social media posts doing better than your emails? What about organic search? These reports will help you find out what's working and what needs improvement.



Dashboards

Get a holistic and high-level view of your campaign goals and how close you are to hitting them with HubSpot's reporting dashboards. Create unique layouts with unique combinations of reports so you can see everything you need to know in one place.

Create your own reports to dig a level deeper into performance specific KPIs. You'll better understand how your activities are performing because you chose the variables yourself.

As an added bonus, you can easily create a dashboard for Donors, Board Members, Volunteers, Funders (Grantors), Other key decision makers to help communicate how successful your fundraising campaign has been.



Qualifying for the HubSpot Nonprofit Program

Qualifying for non-profit status can grant you access to a few benefits or programs with HubSpot. This includes a 40% discount on Professional and Enterprise tier HubSpot products.

HubSpot for Nonprofits is here to help you help others.

HubSpot for Nonprofits is here to support you with its dedicated nonprofit program. HubSpot for Nonprofits has all the marketing, sales, and automation tools your team needs to bring awareness to the people who matter most, your communities. All at an exclusive nonprofit price.

Join 4,000+ nonprofits around the world who are scaling meaningful change with HubSpot.

Apply

Get In Touch!

If you're interested in how Aptitude 8 can help your nonprofit organization make the most of everything you have seen here, give us a visit at www.aptitude8.com!