Donorbox + Salesforce:
Using Insights to Personalize Outreach & Build Donor Relationships

Engaging with your donors on a personal level and building long-term relationships with them is critical to sustained growth for your organization and your mission.
Donorbox and Salesforce Nonprofit Cloud combine to simplify your workload by giving you access to the insights you need to create customized, effective outreach with one powerful integration.

Learn more about how you can use the right insights to make a big difference for your organization.

1. **Create Custom Ask Amounts on Your Giving Page.**

Asking donors for the appropriate ask amount is key to receiving a good response to any fundraising appeal, and using both Salesforce and Donorbox data can help you determine this amount as you customize your Donorbox giving page.

Use your average gift size as a starting point for your one-time ask amounts, then increase them at intervals of 150%, 200%, and 400%.

**Pro Tip: Be sure to include variations in your ask amounts — one for one-time donations and one for monthly recurring donations.** Because recurring monthly donors are giving on a regular cadence, these ask amounts are typically much lower than the one-time ask.

2. **Meet Your Donors Where It’s Convenient for Them**

Your donors are busy. They have jobs, families, and hectic lives. That’s why it’s important for you to put in the effort to “meet” your donors where it’s most convenient for them. New donations through Donorbox automatically convert into new donor profiles on Salesforce filled with critical giving data. By learning how your donors prefer to give and understanding more about the channels they prefer using, you can communicate with them in a more meaningful and effective way.
3. Personalize Email with Pre-built Templates

Your major donors often expect more than just a personalized name in your email. You can create customized content with Salesforce using your supporters’ data, collected from Donorbox, that tells you which programs or campaigns excite them. You can then use these insights and pre-built email templates to send appropriate content in personalized emails that are relatable to your recipients.

You can even use Salesforce to create dynamic content! For example, the program can automatically select images of a beach boardwalk for a walkathon supporter who lives in Los Angeles, while St. Louis recipients are sent images of walkers along the riverfront and Gateway Arch.

**Pro Tip:** It takes more than mentioning a name or a previous gift to show donors you truly know them. **Personalizing your communication to donors is an important area to focus on because it shows your current (and potential!) donors that you value their support!** You show you care when you take the time to curate your communications to suit their needs, interests, and demographics.

4. Collect Information to Curate Your CRM

Take time to ask your supporters about what is important to them by offering feedback opportunities, such as surveys, that can provide you with information about how to communicate with them in the future. Then, create custom fields to store this information in Salesforce.

When supporters give through Donorbox, you can also ensure you have updated contact information on both platforms, and know more about the causes they prefer to support. By mapping supporter feedback and demographics to fields on each donors’ Salesforce record, you can build out robust donor profiles that will help you continue to grow each relationship.
5. Segments Can Sustain Your Campaign

Keep in mind that flooding your supporters with communications that aren't relevant - or interesting - to them can be counterproductive. If the messages you’re sending out are for everyone, they're not really for anyone. That’s why segmenting your communications is critical to the success of your fundraising campaigns!

Using information you collect and store in Salesforce can make segmentation easier for you. Communicating this information back to your supporters shows them that you took time to listen, which can create a powerful connection between them and your organization.

Each organization uses segments differently. Some organizations segment emails simply by donor group, while others use sophisticated segmentation for age, geography, gender, event attendance, and giving frequency. Find a level of segmentation that is comfortable for your organization and use it to curate messages that deliver relevance and authenticity.

**Pro Tip:** Give your fundraising and nonprofit management a boost with free tips and resources from Donorbox’s Nonprofit Blog.