GUIDE

Testing for digital engagement

5 data-driven ways to boost nonprofit digital advocacy programs

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Why does digital engagement matter to nonprofit advocacy managers?

Email raises millions of dollars for nonprofits every year, and organizations on Bonterra Supporter Engagement's Advocacy, Digital, Organizing, and Volunteer Coordination solutions (formerly EveryAction) took **over 34 million advocacy actions** in 2022—many of which were across digital channels. As digital continues to grow, nonprofits know they need to take advantage.

Digital advocacy in particular can help organizations **enlist and retain advocates** across geography, time zones, ability, and so much more. Each advocate can participate and bring their passion to your work in a way that works for them, and every single action they take can help you move your mission forward.

Improving your digital advocacy program requires **testing your engagement rates and optimizing your practices based on your findings**. It will allow you to understand trends—because what gets measured gets moved. But **how do you do that testing**?

In this guide, we'll walk you through:

- Five important **digital engagement opportunities** to optimize across channels,
- **Techniques and tactics** advocacy managers need to run effective tests, and
- **Reports** that help you measure and analyze your progress without taking time out of your advocacy work.

By the time we're done, you'll be equipped with ideas for **experiments that help you develop a stronger and more engaged digital advocacy program**. Let's go!

But first: what's in a digital engagement test?

Make sure others at your organization understand what testing entails, and when they can expect you to deliver actionable results.

CAPTURE A BASELINE AND BENCHMARK YOURSELF.

You'll need to understand where you started in order to measure how far different strategies, backed up by evidence you gather from testing, can take you. You should also benchmark yourself against similar organizations in order to gauge how well your program has been performing—the M+R Benchmarks are a great place for nonprofit organizations to start.

PLAN WHICH VARIABLES TO TEST.

You should limit the number of variables that you test at the same time. This is to make sure you give yourself the ability to draw definitive conclusions by isolating which factor or factors are driving your test outcomes.

TESTING MEANS DEVELOPING A HYPOTHESIS (OR HYPOTHESES!)

You should be able to express the test you want to conduct in an "if/then" statement: **If** we do [action,] **then** we will see [outcome.] Here are some examples:

- **If** we send email on Tuesdays instead of Mondays, **then** we will see improved clickthrough rates.
- **If** we send volunteers their final reminders as text messages rather than as emails 24 hours before our events, **then** we will see lower flake rates and improved attendance rates.
- **If** we move our email subscription form up to the top of our website home page rather than housing it in the middle of the page, **then** we will see more supporters sign up to receive our emails.

UNDERSTAND THAT SOME TESTS WILL GIVE YOU NEW INSIGHTS AND OTHERS WILL CONFIRM EXISTING THEORIES.

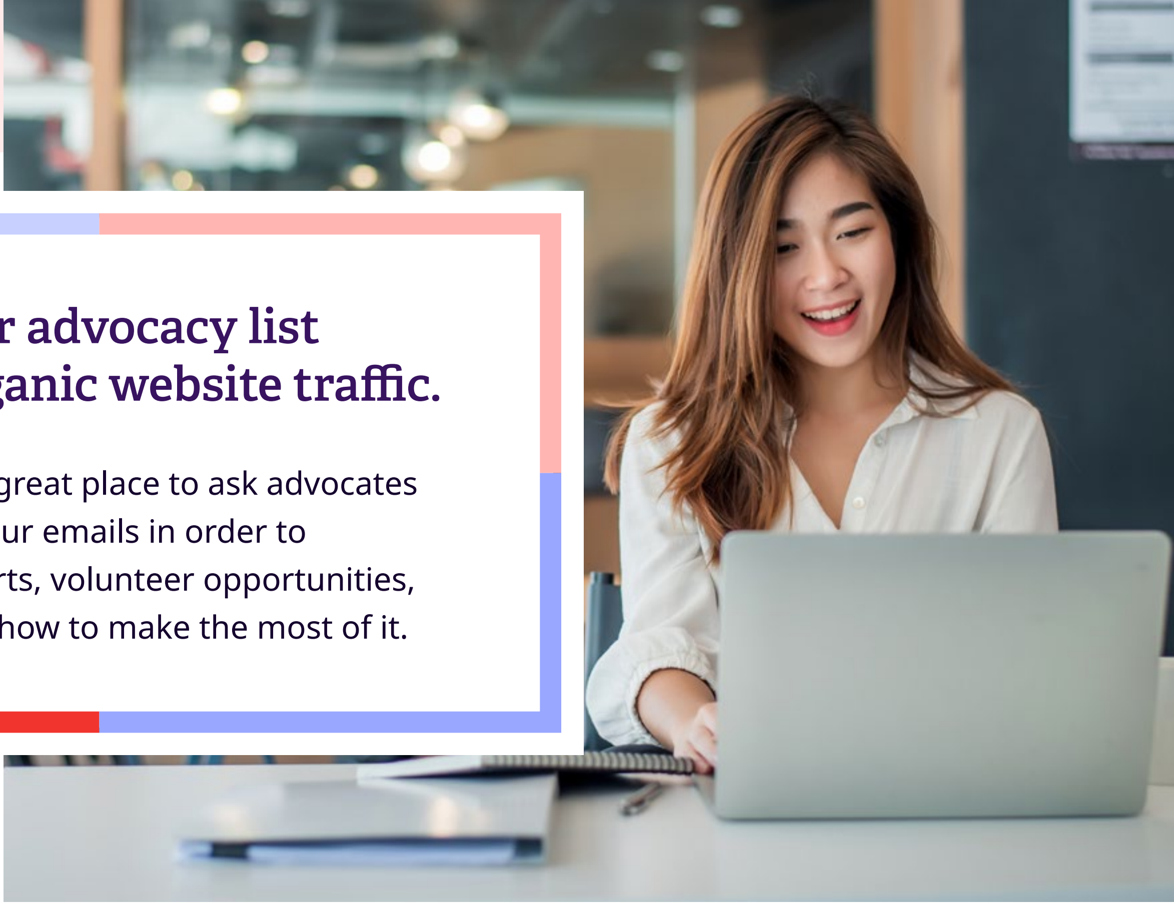
Before beginning a test, understand that it can be just as valuable to finish it and learn that something is working (and shouldn't be changed!) as it is to finish it and learn that something isn't working (and should be changed.) What's important with any test is to design and run it so that by the end, you'll have data to back up a decision you want to make.

DECIDE HOW LONG TO RUN A TEST—AND SHARE THAT WITH THE RIGHT PEOPLE.

Before starting a test (or series of tests,) you might need to set expectations with other folks at your organization about how much time it will take to get statistically significant results. For example: you probably won't be able to achieve statistically significant results in just one email send. In fact, some tests can take months to achieve statistically significant results! Your technology should help you by tracking your chosen variable or variables automatically.

IDENTIFY WHO SHOULD HAVE INPUT ON AND STAY INFORMED ABOUT YOUR TESTING PRACTICES.

While you may want to limit how many people are involved in designing your tests, you'll probably want to keep colleagues on other teams informed about your work. Folks like volunteer managers, fundraisers, and others may feel ripple effects of your work to test and optimize digital engagement efforts for your advocacy audience. A rising tide lifts all ships!



1. Grow your advocacy list through organic website traffic.

Your website is a great place to ask advocates to subscribe to your emails in order to receive action alerts, volunteer opportunities, and more. Here's how to make the most of it.

WHAT TO TEST (AND HOW TO TEST IT)

THE POSITION OF YOUR SIGN-UP FORM ON YOUR HOME PAGE

Placing your form above the fold—that is, on your website home page before any scrolling—can help more site visitors easily locate it, fill it out, and join your email community in order to pitch in and help you make a difference through advocacy. As you're reassessing the location of your form on your home page, this is an important opportunity to make sure your page loads quickly—people tend to lose patience and bounce after a page fails to load within a few seconds, so keep their attention with quick load times.

PRO TIP

Make sure you have your branding applied to all your forms and pages. This is an important visual cue that builds trust with your audience by visually confirming that, yes, the form they're seeing is owned by your organization, and they should go ahead and fill it out.

CALLS TO ACTION

If you're using relatively neutral language ("subscribe to our email"), experiment with more personality-driven language ("join our online community of 2.2 million activists") to encourage more people to subscribe.

LANGUAGE TO DESCRIBE YOUR EMAIL PROGRAM

"Sign up to get email updates from us" may not do the best job of describing what you'd like to send. Experiment with using active and descriptive language ("Change starts with you. Join our movement and receive action alerts to protect our oceans.")

EXPANDING BEYOND EMAIL

Try other ways to grow your list, like adding a petition to your home page, asking for social media follows, or asking supporters to opt in to mobile messaging. Even if you're not running a mobile messaging campaign right away, don't worry—starting out by collecting opt-ins can set you up for success later.

WHAT TO MEASURE

- [ ] The number of **new subscribers** who come in through your website.
- [ ] **Form fills and conversions** for the opt-in pathway you're testing.

KEY TAKEAWAY

Growing your list means meeting more advocates—and figuring out what works to engage them around your mission. The right technology should help you build your list without adding hours of work to your plate.

2. Increase engagement with your email program.

Email is an advocacy (and fundraising) juggernaut, and you deserve to make the most of it. Here are some ways to optimize your program to ensure you're emailing an attuned and active audience.

WHAT TO TEST (AND HOW TO TEST IT)

YOUR WELCOME EMAIL SERIES

Sending new advocates a welcome series is an important way to keep them engaged after they take their first action with you. These first few messages help create the first impression they'll have of your organization, so they can be especially valuable. For a welcome series, it's especially useful to test the **cadence** of your messages and the **asks** you include—for example, how much time falls between your messages? When are you offering educational content, and when are you offering supporters a second opportunity to take action with you? Can you include a double opt-in message at the beginning in order to help supporters confirm that they would like to receive email from you, and build better deliverability over time?

NURTURE SERIES

A nurture series will keep supporters coming back over a broader period of time, and it can be especially fertile ground for testing a wide range of variables, including fun content and creative, since you may be less tied to specific campaign deadlines. Ongoing email nurture series can be a good time to test the use of personalization, especially to remind supporters of how long they've taken action with you, what originally brought them on board, and what you've accomplished together.

CAMPAIGN-SPECIFIC SERIES

If there's a particular initiative you're running, a campaign-specific series will help educate and activate supporters around an event or effort that's timely and relevant to them. These emails may be more time-bound and have very specific goals, so testing elements that help **encourage supporters to click through**—like placing more of your content behind the call to action (CTA) rather than within the body of the email—in order to take an action before a deadline can be particularly helpful.

PRO TIP

Experimenting with email content shouldn't mean abandoning your core messaging pillars or values—developing principles based on **effective and ethical creative best practices** can help guide you.

YOUR OVERALL EMAIL ENGAGEMENT

As you experiment with your various email series, monitoring and taking steps to improve your overall email engagement rate can demonstrate how much of your list is active. Try sending regular "breakup" emails to supporters who haven't opened or engaged with your messages within a certain period of time. This gives them a chance to reengage, refine their subscription preferences, or say a graceful goodbye if they'll continue to be inactive, which will ultimately give you a more accurate idea of how many people are actually engaging with you via your email channel.

Watch a 2-minute tutorial

WHAT TO MEASURE

- [ ] **Email opens**, although if your CRM lacks the ability to help you sort machine opens from human opens, this metric may be less relevant.
- [ ] **Email CTA clicks** and your click-to-open ratio.
- [ ] **Deliverability and soft/hard bounce** rates.
- [ ] **Unsubscribe** rates.

KEY TAKEAWAY

Email has huge potential in terms of reach for advocacy actions. If your technology enables you to use email as a channel efficiently and effectively, you can do more to grow and improve your program over time.

3. Improve the response rate on your online forms and petitions.

You want to successfully engage your supporters and give them straightforward ways to raise their voices in support of your cause during your advocacy campaign—and you're also looking to build your list of supporters. Enter: petitions and online forms.

WHAT TO TEST (AND HOW TO TEST IT)

MESSAGING, IMAGERY, VISUAL ELEMENTS, AND CALLS TO ACTION

Creating alternative versions of a landing page will allow you to test these elements, but no matter your creative experiments, use a clear and compelling headline to grab supporters' attention.

MAKE IT MOBILE FRIENDLY

M+R's Benchmarks for the year 2022 found that "users on mobile devices (including both phones and tablets) accounted for 57% of nonprofit website traffic." Making sure your forms and pages are mobile-friendly and getting a sense of how much of your traffic is coming from mobile rather than desktop will help you do more to reach your supporters where they are.

STREAMLINING AND OPTIMIZING THE FORM EXPERIENCE

Clear away navigation items and declutter your forms by removing unnecessary fields. This will help more supporters to actually convert on your forms, or fill them out and click submit, before getting distracted or frustrated and abandoning them. Additionally, experiment with daisy-chaining your forms—this means directing supporters from one form right along to other. One common use of daisy-chaining is going from an advocacy form to a donation form, but consider other paths too, like asking subscribers to opt in to receive **mobile messages** after signing a petition so they can stay plugged in on the issue.

PRO TIP

Enable one-click form fills to remove obstacles and help more advocates fill out your forms!

WHAT TO MEASURE

- [ ] **Form conversion** rate.
- [ ] **Source of highest form conversion rates by channel** (Where are you getting the most form fills? Is it email, your website, social media, paid ads, mobile messaging?).
- [ ] **Form shares** on social media.
- [ ] **Mobile vs. desktop** form views and conversions.
- [ ] **Acquisition and retention rates** of supporters through your advocacy forms.

KEY TAKEAWAY

Your advocacy forms and petitions aren't just an important way to quantify support for your cause—they're also a critical tool for engaging new and existing supporters. The right technology will make it easy to create, test, analyze, and optimize your forms' performance.

4. Boost attendance rates at volunteer events.

Whether you're hosting a virtual text banking session, an in-person rally, or a hybrid event, you know your advocates' strength is derived from their numbers—which means your technology should help you test and optimize your practices in order to boost your attendance rates.

WHAT TO TEST (AND HOW TO TEST IT)

THE POSITION OF YOUR SIGN-UP FORM ON YOUR HOME PAGE

Making your volunteer opportunities easy to find on your website may help you boost your numbers at events. Specifically, what happens to the number of sign-ups you receive if you decrease the number of clicks a site visitor needs to complete in order to find and sign up for a volunteer opportunity? Your promotion pathways are also a good opportunity to test the blend of channels you're using to solicit registrations—for example, if you've only used your website and email, can you try using digital ads to promote your volunteer program? What happens to your registration numbers if after someone signs up for your event, you serve them an opportunity to invite a friend?

PRO TIP

Your blend of channels should help you make the most of organic promotion opportunities. We've found that organizations promoting an event on our Mobilize.Us network can help organically boost your registrations by 40%!

YOUR IMMEDIATE POST-REGISTRATION WORKFLOW

Attracting supporters and getting them to sign up for shifts is just one part of building a strong volunteer program—another, equally important part is attendance. Your technology should support you as you run tests to improve your volunteer **attendance rate**, or the percentage of volunteers who registered and then attended their shift, and address your **flake rate**, or the percentage of volunteers who registered but unfortunately didn't show up for their shift. Testing the different elements in your automated post-registration workflow may help you send the right nudges at the right times and ultimately drive more registrants to attend their shifts. For example, what happens to your flake rate if you begin sending not only email reminders, but also mobile message reminders the day of your event? What times are you seeing the most confirmations roll in for your different channels, and can you send reminders closer to those peak hours?

YOUR POST-EVENT WORKFLOW

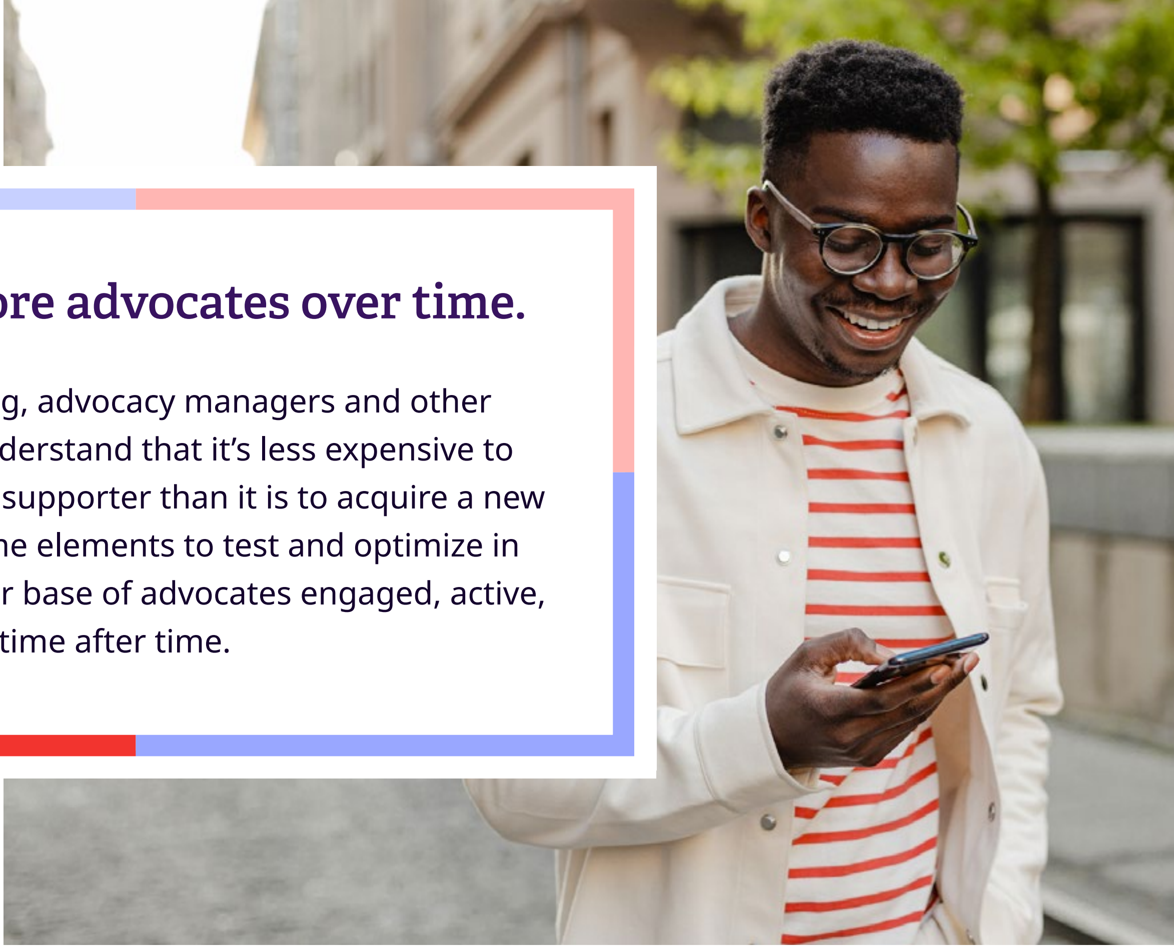
It's always important to say thank you to your volunteers, but using technology to continue the conversation with supporters after you express your gratitude gives you opportunities to test into practices that keep them engaged. For example, does your CRM seamlessly connect to your supporter engagement tools so you can test different personalization in your thank-you messages without spending extra time shuttling data back and forth? In those thank-you messages, are you offering more ways to engage post-event, or are supporters left without a next step? What email series are you providing new and returning volunteers, and if you vary the emails' content and asks, are you seeing them click through?

WHAT TO MEASURE

- [ ] **Registration rate**, including the source of the registration.
- [ ] **Attendance rate**, or how many volunteers attended their shifts.
- [ ] **Flake rate**, or how many volunteers missed their shifts.
- [ ] **Acquisition rate**—and the channels new volunteers are entering through.
- [ ] **Retention rate**—and the digital channels where existing volunteers are taking the most action.

KEY TAKEAWAY

If you're an experienced volunteer coordinator, you know you need to meet your supporters where they are, match them with the right opportunities, and help them follow through on volunteer commitments they make. Your technology should help you build relationships with your volunteers through consistency and reliability.



5. Retain more advocates over time.

Generally speaking, advocacy managers and other nonprofit staff understand that it's less expensive to retain an existing supporter than it is to acquire a new one. Here are some elements to test and optimize in order to keep your base of advocates engaged, active, and coming back time after time.

WHAT TO TEST (AND HOW TO TEST IT)

SECOND ASKS FOR NEW ADVOCATES

Our friends at Plural take special note of how quickly a supporter takes a second advocacy action, since that can indicate a strong affinity for your mission and the work you do. Your technology should help you test different asks in order to measure which ones work the best to generate the most responses. You may want to test messaging, your message length and the creative associated with it, and the time commitment you're asking from them in this second ask, along with the blend of channels you use to steward new advocates toward their next action with you.

TACTICS THAT REENGAGE LAPSED ADVOCATES

As you're reaching out to folks who've let their support trail off over time, consider the content of your message and the nature of your ask. Sending some lapsed supporters something timely and connected to the news and others something evergreen can help you develop a sense of which opportunities work better to reengage them. Additionally, sending some lapsed advocates a lower-effort ask like a petition signature and others a higher-effort ask like an in-person volunteer event can help you refine your recapture strategy for these supporters.

USING TECHNOLOGY TO SCALE UP OVER TIME

Looking into the future, your technology should help you not only meet your short-term goals, but make the most of your staff's expertise by tracking your efforts at building up strong advocates into leaders who can help you expand your program's capacity to do even more in pursuit of your mission. As a real-life example, our friends at M+R saw that ongoing, consistent programming and training not only helped Planned Parenthood build out their National Volunteer Program, but also build super volunteers (those who took consistent action with the organization) into volunteer leaders and coaches so the whole organization could scale up their program and build their capacity.

Using technology to store data and report on your progress can help organizations succeed at this kind of scaling effort. If you're leading weekly mobilization calls, make sure that information flows into your CRM through the right integration so you can track attendance and quickly identify volunteers who are ready for more opportunities. Giving volunteers the ability to self-select into the opportunities that are right for them means creating intuitive forms and building branched automations that send supporters more information about their chosen opportunities without requiring more effort from your staff. Collecting stories from volunteers about their personal experiences with your work or issue area means you'll need a way to capture those details without a lot of effort from supporters, centralize that data, and make it available to all the right staff for use at all the right times.

At the end of the day, when your platform supports the work your advocacy and volunteer managers do, they have more time to spend on building the strong relationships your organization needs to create deeper engagement and promote lasting social change.

WHAT TO MEASURE

- [ ] **New retained** advocates and **long-term retained** advocates.
  - [ ] **Lifetime/life cycle** of an advocate.
- [ ] How quickly new supporters take a **second action**.
- [ ] **Which channels** drive the most action, including:
  - [ ] Registrations.
  - [ ] Confirmations.
  - [ ] Post-event feedback.
- [ ] **Reactivation rate** of lapsed advocates.

KEY TAKEAWAY

The secret to building an engaged and educated body of advocates is to help them build the habit of taking action with you—that's a more efficient approach than starting from scratch each time you start a new campaign. Your technology should help you keep your supporters engaged, whether it's their first time or their fiftieth lending their voice to your cause.

Your next steps

You have a mission, plus short-term and long-term goals to achieve in support of that mission. Your work is too important to not make the most out of your digital advocacy campaigns—and running effective tests will give you the data you need to make decisions that help you improve your program and ultimately create more of an impact on our world.

Talk to us to learn more about how the right technology can help you build, scale, and improve your digital advocacy program and practices.

READY TO CREATE LASTING SOCIAL CHANGE? GET IN TOUCH TODAY.

See our solutions