

Little Green Light

LGL Training: Communicating with Donors (Mailings, Emails & Appeals) September 2018

Training objective:

Provide attendees with a greater understanding of how to use LGL's Mailings, Email and Appeal features by providing some common use-case scenarios for each

Scenario #1: Using Mailings to send a printed year-end tax receipt

- LGL Mailings makes it possible for you to create personalized letters, labels and envelopes directly inside LGL. When you use LGL Mailings, LGL automatically documents that activity in each recipient's constituent record, allowing you to easily view which mailings your constituent has received.

Step 1: Go to Mailings tab, click Add a mailing (enter 4 step process)

Step 2: Build your mailing list (2017 donors)

Step 3: Select which output options you want: Letter, labels, and/or envelopes

Note: Letter creation, either LGL Editor or MS Word) If LGL Editor, you can create letter content in this step or use a previously created template.

Step 4: Name your mailing/settings

Step 5: Review/download & print (Mark sent)

Scenario #2: Send email pledge reminders to those with installments due next month

- The ability to send emails via LGL is included with your account and is a great way to send email acknowledgments or pledge reminders but is not meant to take the place of an email marketing service like MailChimp or Constant Contact

Step 1: Go to Mailings tab /select Emails then click Add an Email

Step 2: Search for constituents who have installments due next month (gift date= next month, gift type=installment)

Step 3: Create email content/insert merge fields as needed or use a previously created template

Step 4: Name email

Step 5 : Review/edit if needed then queue for delivery

Scenario #3: Using Appeals to track who received and responded to a request to donate via an envelope inserted into your recent newsletter

Why use Appeals?

- A strategic way to document who's been asked for what and how they've responded.
- Can also be a useful way to see which efforts are more successful and allow for comparison of year to year outreach efforts

Step 1: Add a new Appeal (Name, date, goal, assoc. w/Campaign/type)

Step 2: Create a list of who will receive newsletter/ask

Step 3: Generate labels for those receiving newsletter from within Appeal

Step 4: When gifts are received, associate them with this specific appeal

Viewing Appeal Results: (by appeal type for comparison)

Appeal dashboard: Total raised vs Goals, Fundraising by Appeal view (2016-2018)