MISSION: UNCOMFORTABLE

How Nonprofits Can Embrace Purpose-Driven Marketing to Survive and Thrive

By Stu Swineford and Aaron Wrixon

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MARKETING IS NOT A DIRTY WORD

As the leader of a nonprofit organization or its marketing department, you may have been told that investments in marketing run contrary to your organization's mission. At the very least, you may feel that any spending that can't be *directly* tied to that mission runs counter to the good you accomplish for the world. (Worse, you may worry that spending money on marketing actively robs the benefits you provide from the people who need them most.)

These beliefs, although they're likely rooted in a genuine desire to do good for your constituents, are patently false.

Like any for-profit business, your nonprofit needs to invest time and energy—and yes, capital—in marketing to do the most you can for your stakeholders.

Because marketing, at its core, is about building relationships. And your nonprofit relies on those relationships to attract volunteers, engage with beneficiaries, build a team, recruit a board, attract press interest, and enlist the help of donors to do the *most* good you can for those you seek to help.

Besides, marketing *should* be considered an investment that helps you expand your ability to deliver on your mission. (Most healthy for-profit businesses invest between 3 and 20% of gross revenue, depending upon their market and desired growth goals).

Consider how much $1,000 could help your organization bring true benefit to the world. How much *more* good could you do with $10,000 to invest in that same mission? $100,000? If you could expand your ability to reach ten or even 100 times more people, wouldn't that be a boon?

That's the power of thoughtful, systematic marketing—what we call "Purpose-Driven Marketing—and what this book is all about.

But let's go back to relationships for a minute. The first step to building a healthy relationship is to create awareness. After all, how can you have a relationship with someone if they don't know who you are?

And just like you did in grade school with the person you had a crush on, you have to introduce yourself.

But you can't merely send your audience a note that reads, "Do you like me? Circle Yes/No."

Well, one way to build relationships for your organization is to get the word out about the good you create—heck, even the fact that you exist.

And you do that with marketing.

Specifically, *purpose-driven* marketing: a marketing style that takes advantage of all today's modern methods—search engine optimization, content marketing, conversion-focused copywriting, pay-per-click ads, and so on—but makes sure that advancing your *purpose* is the primary order of business.

Purpose-driven marketing is a great way to ensure consistent communication and messaging with your donors, volunteers, and other people you serve.

Not only that, purpose-driven marketing can help you reach *new* individuals that can benefit from or support your organization.

Many benefits flow from engaging in purpose-driven marketing.

First, purpose-driven marketing takes advantage of a *system* by which you build relationships—attracting stakeholders and connecting with interested individuals, engaging with them, and inspiring them to promote your organization to *their* networks. A streamlined system like this ensures that you effectively nurture your relationships, which creates predictability for your organization and builds the foundation on which you will be able to survive and thrive.

Second, a purpose-driven marketing system builds a hook on which you can confidently hang other marketing investments and opportunities. The wealth of materials you'll create to Attract, Connect with, Bond with, and Inspire your audiences (we'll explain these terms shortly) can be re-used effectively *outside* of the purpose-driven marketing ecosystem. (For just one example, let's pretend your founder is accepting an award; if you've already done the work to create a wealth of purpose-driven communications, her acceptance speech will virtually write itself.)

Third, purpose-driven marketing creates messaging consistency for your team. That consistency, accelerated by the structure of purpose-driven marketing itself, can foster additional benefits that keep your audience engaged and boost your organization's performance more organically. Search engines love activity—both on your site and on social media. So the effort you and your team put in to fuel your purpose-driven marketing activities will have the residual effect of improving your search engine and social rankings.

Historically, some marketers (mostly in the for-profit space) have given marketing a bad name. Indeed, there are plenty of examples of marketers stepping over the line, leveraging suspect techniques, and generally being "bad people." And, yes, these have contributed to the bad taste some people get in their mouths when they hear of "marketing."

But it doesn't have to be this way.

Purpose-driven marketing aligns with your organization's values, vision, and mission, to expand the good you can do in the world. It isn't about taking advantage of your stakeholders or tricking them into doing anything unsavory.

Purpose-driven marketing is all about building strong, lasting relationships with your stakeholders, spreading your message to the broadest audience, and creating opportunities to do the *most* good you can for your beneficiaries. It's rooted in the idea that you and your organization do great work—and that you simply want to expand your ability to do this excellent work for the most people possible.

Because what happens when you *don't* invest in purpose-driven marketing for your organization?

Immediately speaking, you miss the opportunity to talk to the part of your audience that wants to engage *now*. Long-term, if you're not building connections now, you'll also miss the opportunity to engage with people down the road when they *are* ready.

It's important to consider all the ways your team can reach out to and build relationships with your stakeholders. Most of these fall under the "marketing" umbrella—or at least originate there.

Simply hoping your mission will speak for itself and naturally draw an audience is no longer an effective strategy. You need a new paradigm, a shift in the way you think about your organization and how it spreads its message.

Because being a viable player in an increasingly noisy world—trying to compete for the attention of an audience continuously buffeted by advertising messages—requires a new approach to nonprofit marketing. It's time to think about purpose-driven marketing and how this powerful system can expand your reach; enable you to connect with a larger, more engaged audience; and do more good in the world.

Yes, this is a new way of thinking about your organization.

But any discomfort you may feel is a natural reaction to the idea that marketing has to be disruptive, inauthentic, or generally sleazy to get things accomplished. This is simply not the case.

Purpose-driven marketing uses some of the same *tactics* as for-profit marketing. But the *strategy* that drives it is the polar opposite. At the root of purpose-driven marketing is the desire to do real good.

So let's get started.

PART 1: WHAT IS PURPOSE-DRIVEN MARKETING?

Simply put, purpose-driven marketing is marketing aligned with ethical values. Trust, respect, honesty, kindness, compassion—purpose-driven marketing takes these ideas as guiding principles. It aims to naturally attract visitors who resonate with these same values, rather than manipulate them into mindless compliance with a marketing message.

WHAT IS PURPOSE-DRIVEN MARKETING?

As a purpose-driven marketer, you'll create compelling content that gains your stakeholders' attention, makes your nonprofit more easily found online, and draws participants to your organization's website. Once they're there, you'll use purpose-driven systems to nurture these individuals through an engagement lifecycle and invite them to become donors, supporters, volunteers, constituents, beneficiaries, or even customers. (For "customers," here, substitute whatever word you use to call the people or populations your organization exists to help.)

Purpose-driven marketing relies heavily on a "sharing is caring" approach to stakeholder engagement. It leverages healthy relationship-building to create trust between you and your potential donors, volunteers, and participants.

And by creating content that appeals to these different audiences, you can attract the people with whom you want to engage—and better target those who could benefit from your services.

In short, purpose-driven marketing helps you build awareness and credibility to serve your purpose more effectively.

> *CONSIDER: Think of ways that for-profit businesses have used marketing techniques that you've responded to in the past. How could these be transformed to be more appropriate for a nonprofit audience?*

THE AUDIENCE ENGAGEMENT CYCLE

Purpose-driven marketing nurtures stakeholders, transforming them from interested parties into connections, then into participants, and then promoters of your organization.

Put another way, promoters don't just materialize out of thin air. They start as strangers, visitors, contacts, and participants. So purpose-driven marketing brings specific marketing tools and actions to the table to nurture those individuals throughout their journey.

In the for-profit world, this lifecycle is often called "the marketing funnel." Typically, this model imagines that many people enter at the "top" of a funnel, where they spend their time exploring and researching information about a challenge they may be facing or a goal they are trying to reach.

At this phase, people may not even realize they have a problem to solve. Alternately, they may have a basic idea that challenges exist, but they don't yet understand the true scope of the situation they're facing. As a result, they're just poking around for information or resources.

You can think of this phase as diagnostic; the people visiting you are asking the question, "Do I have a problem? And, if so, what is it?"

A funnel-based approach to marketing suggests that your job here is to provide a wealth of information that can help move some percentage of these "researchers" to the next phase of discovery—the "middle of the funnel."

In the middle of the funnel, people have typically identified that they have a problem and are now starting to research information about solutions.

Here, says the funnel model, you'd provide information about how to solve those problems. The goal is to demonstrate your company's understanding of these solutions *without* scaring prospective customers away by going "too hard" on why they should buy now. (It's a delicate balance.)

Sales messages like that are reserved for the next phase, the “bottom of the funnel.” If you’ve done your funneling job correctly, according to the model, you’ll be dealing here with much fewer people. But, in theory, if those people are still around, they must be very interested in buying.

Here you start to emphasize the differences your company brings to the table to make it the best choice. White papers, case studies, impact reports, “total cost of ownership” studies, buying advice, and the like—all of these are what you’re “supposed” to use to help convince people that your company is the one they want. This is the “selective” phase of the stakeholder’s journey—you’re helping them select you as the right choice.

To review, here’s an easy way to think of these phases:

- Top of funnel: Problem awareness/Diagnostic
- Middle of funnel: Solution awareness/Prescriptive
- Bottom of funnel: Organization awareness/Selective

And to be clear, there’s nothing abjectly wrong with this model—if you want to use it in the for-profit world.

Yes, it can seem distasteful to think of faceless humans, funneled unsuspectingly into a machine whose only goal is to produce hyper-loyal buyers.

However, if you were to replace the words “marketing funnel” with, say, “selection process,” you’d end up with a model that had a certain undeniable logic.

But what of the nonprofit world? How do you reconcile a “funnel” model with the kinds of values that drive purpose-driven marketing?

First, you start by throwing out the term “marketing funnel” altogether. To us—the owner of a purpose-driven marketing agency and a conscious copywriter—the idea of a funnel is anathema to what we’re trying to achieve with what we’ve awkwardly been calling the “purpose-driven marketing revolution.”

We prefer to talk about the *Audience Engagement Cycle*, a carefully chosen phrase that speaks to three concepts.

First, “Audience.” We landed on this word because, frankly, it’s a lot easier to say than “visitors and donors and constituents and stakeholders and all of the other people who interact with you.”

Second, “Engagement.” For us, the idea of engagement is at the heart of everything a purpose-driven marketer does. Marketing shouldn’t be about tricking people into doing what you want or forcing them through some undesirable process. Purpose-driven marketing is about engaging your audience, plain and simple.

And third, “Cycle”—about as natural a word as there is. Think of the water cycle, in which liquid water evaporates, then condenses into clouds, then falls back to Earth as precipitation. To us, this is the perfect representation of what we hope happens every time we engage audiences—they come to us, are transformed in some way, then return to their lives changed. (And, if we’re truly lucky, ready to start the process with us again someday.)

| THE ACTIVITIES IN THE AUDIENCE ENGAGEMENT CYCLE

While the for-profit funnel model is based on three phases, the Audience Engagement Cycle (AEC) is made up of four activities:

1. Attract
2. Connect
3. Bond
4. Inspire

Why activities?

The funnel model focuses on "where" a buyer is in the funnel, as it's primarily concerned with whether prospective customers are squeezing through the funnel on a journey from unknowing visitor to (hopefully) willing buyer.

But the AEC consciously zeroes in on what *you* need to *do* in each phase. It's not about the "where," but the "how."

We feel this distinction helps remind purpose-driven marketers that they're dealing with real people. It also underlines the idea that, as a marketer, you are *doing something to someone* as you try to get your message across—and, accordingly, you owe it to your audience to act responsibly.

We'll now elaborate on these four activities in the next section.

As you read, remember one thing. You don't necessarily carry out these activities in a stepwise fashion. There's no "green light" that comes on to indicate you've finished Connecting, for example, and now you can move on to Bonding.

Because not every member of your audience's journey will be the same—meaning you may not get the chance to move through every activity with everyone. Some may be Attracted to your organization but decide never to engage with you. Some may find out what you stand for as you're trying to Connect with them and decide there and then to donate, volunteer, and spread the word.

You may also need multiple "touches" to nurture your audience to the point where you can begin the next activity. For example, you may have to send emails for months until a volunteer decides to donate—and even then, they may take years to share your mission with those close to them.

For another example, it will likely require more relationship-building to Attract a large, corporate donor than it will an individual donor. In each phase of your relationship-building with the large donor, you might need to be more patient and create more materials and Connection activities before they Bond with you.

It's important to act as if you need to do each activity for everyone, however. Because, for the most part, your audience will eventually move through all of the psychological states that the four activities address.

Many will want to know more about you. Some will be interested in connecting. Some of *those* will grow to support your mission. And a few (or more) will go on to evangelize for you.

So without strategies and tactics to shore up each of the four activities, you risk wasting time, effort, and precious dollars.

PART 2: THE FOUR ACTIVITIES: THE PILLARS OF PURPOSE-DRIVEN MARKETING

Let's take a deeper dive into the four activities that make up the Audience Engagement Cycle: Attract, Connect, Bond, and Inspire. Together, you could consider these the four pillars of purpose-driven marketing.

THE FOUR ACTIVITIES:
THE PILLARS OF PURPOSE-DRIVEN MARKETING

ACTIVITY #1: ATTRACT

The process of Attracting an audience starts with three questions:

- Whose attention do you want to Attract?
- What's in it for them?
- What action do they need to take to get engaged?

But before you get too involved, you need to understand that you don't want just *anybody* to come to your site to engage with you; you want the *right* people.

So who are the "right" people?

To answer that question, you'll want to identify and create "personas"—fictitious personifications of the kinds of people in your target audiences.

Creating Personas

Personas (sometimes also called avatars) help you refine your voice and tailor your content. In essence, they help you zero in on the wants and needs of the people you want to reach—and guide the way you invest your time and money on getting in front of them.

Personas detail the demographic information common to the best members of your audience, as well as the goals, challenges, and barriers to supporting you that they might face.

Your personas aren't static templates but living guides. They help you and your team make better decisions about the people you're contacting and the messaging that will resonate with each group.

In other words, personas can evolve as you gather more information about and develop a more robust understanding of your audiences—who they are, where they get their information, and what types of materials engage their interests.

Always start with data when developing personas. If you have historical information about donors, volunteers, or sales (if your nonprofit has a paid service or product), take a peek at your information to see if you can discover commonalities among your best audience members.

For example, if you're looking to build your volunteer base, you could produce a list of all your volunteers and sort by the number of volunteer hours per person. If you analyzed this information, you could discover commonalities among the most prolific volunteers and develop a persona based on those characteristics. This would provide a starting point from which you could try to understand what motivates "super-volunteers," guess at where they go to find volunteer opportunities, learn about their demographic information, and so on. And it would help you more easily reach out to—and relate with—similar super-volunteers you don't know yet. (Best of all, you could simply ask them about their preferences, since you already have an established relationship with them.)

Perform this exercise for each audience group you want to Attract—volunteers, donors, and even Board members and staff—to supercharge your purpose-driven marketing and streamline your outreach:

- **Volunteers:** What type of volunteer opportunities do you offer? Is there a specific industry from which you can recruit? What motivates their desire to give time or money? What age groups do they represent? What do they do in their free time?

- **Individual donors:** What type of work do they do, or what life experiences have they had that make them want to support your cause? How much money do they make? What frustrations are they trying to alleviate with their donation? Do they belong to any common organizations? What publications do they read or sites do they frequent? Could they become recurring donors?

- **Super-donors:** Take a look at the individual donors who go above and beyond for you. Are they running a foundation? Do they have a personal connection to your organization or its mission? Have they had a powerful experience or life-changing event that makes them want to engage so dramatically? Are there egos involved?

- **Corporate donors:** What motivates an individual to bring their business in as a corporate donor? Are they the key decision-maker, or are they making the recommendation up the ladder? Is there a PR play for the corporation (often called "cause marketing")? Are there multiple personalities involved in this decision? Is their corporate mission aligned with your organization's?

- **Participants:** How do people find you when they need to access your services? How do they access your website—at home or on a public computer? On a phone? What challenges are they facing? Where do they turn when they're looking for information? What are the *feelings* they are experiencing?

- **Customers:** If you also sell products or services, what would make people potential customers? With what kinds of problems are they struggling? What other options do they have (i.e., your competitors)? What differentiates *your* product or service?

You could even go deeper with your research by sending surveys or scheduling interviews to get additional insight into what motivates these stakeholders, where they go to get information, how they prefer to be contacted, and more.

Because when you have robust personas for each of these groups, you'll have a much clearer idea of how to Attract each specific group:

- *Who* you are talking to.
- *What* materials and content types will work best for that persona.
- *Where* to publish content to reach each persona.
- *When* you should try to reach them.
- *How* you communicate with each group.

Creating Content for Your Personas

Once you have defined your target personas, you can address the core component of purpose-driven marketing—content.

Content comes in various forms, from blog posts to infographics, webinars, podcasts, eBooks, and everything in between. These materials help position you and your organization. And they provide the value to your stakeholders that encourages them to exchange the information, time, resources, or donations that drive your mission.

Ideally, these materials—sometimes called "lead magnets" or "content magnets" as they attract your audience like a magnet—require that stakeholders provide an email address to download them. Some content (for example, blog posts) should remain free as a low-barrier way to start conversations.

A mix of content types is usually most effective in drawing prospects into your sphere of influence, enticing them to give you their contact information, and enabling you to continue to provide value over time.

Regardless, your audience wants *information* from you when they're just getting to know you.

That's why your purpose-driven marketing needs to engage new audience members. The content you produce should provide answers to their basic questions and satisfy their initial needs. (Most often, this content will speak to the challenges and frustrations motivating their interest in your organization.)

There are many ways to Attract new audiences with this kind of content:

- **Blogging.** Consistently creating compelling blog posts is one of the best ways to Attract your audience. Remember, though—to be found by the *right* audience, you should create content that answers questions they have about their challenges and frustrations. Blogging positions your organization with authority—and demonstrates that you're willing and ready to help your stakeholders overcome their challenges to reach a specified goal.

  Interestingly, your blog doesn't necessarily have to be *written* posts. If you prefer to create—and your personas prefer to consume—other types of content like videos or podcasts, use those mechanisms to consistently get your message out there and keep your site up to date.

- **Social Media.** When used correctly, Social Media can be an effective way to build relationships.

  The best accounts post a variety of interesting content and actively engage with people.

  If you are struggling with what to say on Social, think about a set of "idea buckets" from which you can draw inspiration. For example, some posts could be informational; others, aspirational. You could post success stories or share articles published by others you feel would be helpful or informative to your audience. You might share "behind the scenes" information, overt calls for donations or volunteers, and more. Find the buckets that work well for you and dip in!

  Then, when it comes time to engage with followers, *really* engage. Start conversations. Ask questions. Social media engagement goes both ways—it's not about publishing content in a vacuum.

- **Podcasts.** Podcasts are a fantastic way to introduce your mission to the masses. Depending upon how you structure your podcast, it can also be a valuable tool to generate other content ideas. A good interview is usually full of fodder for additional content pieces; even the interview itself can often be turned into other content. (Transcripts, audio excerpts, book material, YouTube or Facebook Live videos, and so on.)

  Think: the more you can get out of each podcast, the more places you can promote your message to a broader audience.

  Incidentally, if you're curious, one of us (Stu) has a podcast where he hosts informal chats with interesting people in the nonprofit space. You can learn more or sign up to be a guest here: https://relishstudio.com/podcast/

- **Other places to publish content.** You may find your personas get information from forums, webinars, conferences, networking events, other people's podcasts, and so on.

  Get creative about putting your organization out there to engage with potential stakeholders. Again—be sure to *engage* instead of merely "depositing" your message in front of your audience or going for the "hard ask." When you keep the idea of "relationship-building" in mind—and lead with a genuine desire to help—you'll go far.

Making Sure Your Content is Reader-Focused

If you're reading this, you've probably already created a site for your organization; we won't spend too much time, then, on the importance of having a strong web presence that tells your organization's story.

Let's ask this instead: what is that website *doing* for you?

Your site is an opportunity to capture the hearts and imaginations of those who find it. And the most effective way to do that is by telling a certain kind of story—one that casts your reader as the hero in the mission you're trying to achieve.

Let's say your organization fosters literacy in underprivileged communities. Can you feel the difference between "We help children learn to read" and "You can help children learn to read?"

In the marketing stories that fill your website, we always recommend casting your reader as the hero and relegating your organization to the role of "guide." In other words, you're not the ones doing the good work—you're helping your *audience members* do it on behalf of your organization.

If you accomplish this well, your site will capture your readers' attention, captivate them, and help them come to engage with your programs.

Getting Traffic

All of the time, energy, and effort you put into content should have the ultimate goal of driving traffic to your site—so you can transform your visitors into Connected audience members.

"Traffic" is shorthand for *all* the people who come to your digital properties—website, Facebook page, GuideStar profile, YouTube channel, and so on. But your traffic numbers aren't just metrics that you need to increase; when you realize that traffic is the sum of all the opportunities you have to connect with people, you'll naturally treat it differently.

And remember—you don't generate traffic for its own sake. What you can *do* with that traffic is just as important. After all, as we've said before, you don't just want to get people to your properties; you want to Attract the *right* people and convince them to Connect once they arrive.

Solving the traffic problem can be challenging, however. If you'd like help, we'd be happy to talk.

Improving Your Search Engine Results

Your website can't live up to its full potential if your audience can't find it. Your target personas begin their engagement process online—usually by using a search engine to find answers to their most pressing questions.

So, you need to make sure your site appears *when* and *where* they search.

This is especially important if your goal is donations. According to the 2020 Global Trends in Giving Report, fully 63% of North Americans surveyed prefer to give online with a credit or debit card. In other words, if people can't find you, your donations are in trouble.

To help your site show up in search engines, you need to identify the search keywords your audience will likely use. After all, when they're trying to find information about their challenges or the solutions your organization provides, they're going to search for something, right?

You can optimize your pages and posts to perform well in these keyword-driven searches by creating content that speaks to those phrases (as well as working to build links to your content across the web). This process is called Search Engine Optimization (SEO). The full breadth of the SEO process is beyond this book's scope, but from a strategic perspective, it's important to keep a few considerations in mind.

First, there is no SEO "magic bullet." If it's to make a difference, SEO requires consistent, month-over-month effort put into content creation, measurement, and refinement. Think of SEO as a kind of "dimmer switch" for your site that comes on slowly. It's a slow-burn mechanism that builds in value over time. (It also degrades gradually, however—leave it alone for too long, and the results for which you have fought will disappear.)

SEO isn't just about on-site activities, either. Your results will be influenced by the volume and quality of links that point back to your website. That's why both an on-site *and* off-site SEO plan is needed to achieve the most significant effect.

To further complicate matters, everyone else is out there trying to crawl to the top of the SEO ladder. So if you rest, you get passed. The rules are continually changing, as well. After all, the search engines are doing everything they can to provide the *best* search results for those who use their systems. That means they're continuously adjusting the rules by which sites are ranked—to improve the chances of the most relevant materials appearing first.

If you're starting to feel like optimizing your site for search engines is a daunting process, you're not alone.

But take heart. You can achieve not-insignificant results by doing just two things: regularly publishing helpful content and asking your audience to share that content widely.

The search engines are getting smarter every day about delivering the best content to their users, so spending endless time and money on trying to game the system is simply not the right approach for your organization.

Keep it simple: Write for your audience. Publish valuable materials for them. Ask them to share.

And do it often.

Using Social Media

Purpose-driven marketing is about creating great content that helps your personas overcome the challenges they face. Publishing information on the social networks where your personas "play" helps you get in front of those audiences and share valuable information with them. In turn, this helps engage with your prospects and puts a human face on your brand.

It only makes sense, then, to be on the networks where your personas spend their time. (Yes, that might mean LinkedIn, but it also might mean TikTok.)

A healthy mix of materials can be useful. Figure out what types of media your audience prefers and push that content out most frequently. For example, if you've determined your personas prefer reading, don't put all your eggs in the video basket.

But don't forget: personas are just guides. Feel free to get creative with your publishing and experiment from time to time. Blog posts, videos, audio, infographics, photos and graphical content, slideshows—these can all be effective ways to keep your audience engaged.

In the same vein, creating a mix of goals is also recommended. If you're always asking for donations, for example, you're going to lose your audience. Don't forget to mix in news updates, interesting reading, thought leadership pieces, links back to blog posts, and so on. A healthy mix of materials ensures that you're providing value to your audience. You won't come across as "selling" all the time, and you'll always contribute to the healthy relationship you want to build.

| ACTIVITY #2: CONNECT

Once you've Attracted visitors to your website, you need to start a relationship with them. That's why Connect is the next phase in the Audience Engagement Cycle.

Here again, we borrow from the for-profit world. Your primary Connection activity will be creating content that offers your visitors some kind of value in exchange for their contact information.

That *exchange of value* is key: the Connect phase of our process is a "give and get" situation. So, yes, it's appropriate to ask your visitors for contact information—but only after you've made sure your offer will genuinely help them.

Because contact information represents the most valuable currency for your organization. It's what starts the entire process of transforming strangers into supporters and advocates. Over time, your contact list will become one of your organization's greatest assets.

But today's web users are savvy, and they've been burned over and over by, shall we say, more unscrupulous marketers who only want to take advantage of their email address.

So they'll likely be reluctant to share details with you—which means it's all the more critical to offer high-value worksheets, eBooks, access to exclusive information, tip sheets, guides, and so on. (In our experience, content offers can vary widely among nonprofits, but virtually every organization has *something* that will entice its audience members to provide their contact information.)

Making Calls-to-Action

Most websites, nonprofit and for-profit alike, make a significant mistake. They fail to use strong, effective calls-to-action, or CTAs—on-page elements like graphics, buttons, or links that tell your visitors what to do next. If you've ever read "click here," "add to cart," or "donate now," you've seen a CTA.

Your site *must* expect your visitors to take action—and then present instructions about what to do in a clear, concise manner. If your site doesn't have the right CTAs, you'll have a difficult time creating connections.

The best calls-to-action are tailored to request a specific action well-aligned with the page content and your stakeholders' pressing challenges or motivations. "Talk to our team," "Volunteer on a project," "Donate now"—all of these might be appropriate CTAs. But many organizations equivocate—"Learn more" is a terrible CTA—or even refuse outright to ask for action.

Be bold. Ask for what you want. And repeat that request often, both across your site and on individual pages.

Most times, you'll want to create CTAs that lead to dedicated landing pages or sign-up forms, but cross-promoting other on-site materials can also be an excellent way to drive engagement on your website. Providing a form in conjunction with your CTA can also be effective—for example, asking people to sign up directly to an email list.

Finally, here's a tip to consider: because of a psychological quirk called the consistency principle, pre-asking website visitors for a small "yes" has been shown to increase the percentage of people who give you their information.

People are biased toward cognitive consistency—behaving consistently with their previous attitudes, beliefs, and actions. In other words, get them to say "yes" once, and they'll be more likely to do it again.

So imagine, for example, you were to ask "Would you like our free eBook about the poaching crisis in Sudan?" Those who clicked "yes" would be even more likely to fill out a form to get that resource. Use this principle effectively, and it could increase the number of people with whom your organization can connect.

Using Landing Pages

In most instances, when one of your website visitors clicks on a call-to-action, they should then be sent to a landing page—a specialized page with information about the offer you're making, and a web-form the person uses to submit their contact information.

When they click submit, they're typically taken to a thank you page and presented with the offer you promised. And because you have their contact information, your organization can begin a conversation with them.

Landing pages are most effective when they strip out everything not related to your offer—such as social media links, competing offers, and even navigation menu items—to keep from distracting users before they complete the form.

Bottom line: landing pages streamline the engagement process, keep your audience on track, and improve your opportunities to build relationships online.

Optimizing Forms

If the purpose of a CTA is to get visitors to the landing page, and the landing page gets them to give you their information… Then it follows that the most valuable part of your landing page is the form.

That's why it's crucial to get your form "right." Keep your form as brief as possible, and make sure it's well-aligned with the "value" of the offer you're providing.

In other words, resist the urge to ask for too much information too early in your relationship. (Do you *really* need to know their birth date at this stage of your budding relationship?)

To start, asking for a first name (or full name) and email address is ideal. This is all the information you need to continue the process of engaging with your new connections. Other details—not to say that they're not necessary—can come later.

If you absolutely need to collect more information than that, consider using a “smart form” to dynamically customize your form fields based on the answers you receive in previous fields. These are more complex to design and implement, but they can provide a balance between giving you the information you want and scaring visitors away.

For example, the answer to a simple question like “What’s the best way to stay in touch with you?” could trigger the appropriate field—phone number, email address, mailing address—but only show the fields that were relevant to the answer provided.

| ACTIVITY #3: BOND

You've attracted the right visitors and created the right connections, but now you need to Bond with those connections so you can transform them into stakeholders.

But how will you know if you're making progress?

As mentioned above, you'll need a system to keep track of the connections you are making and monitor where they "are" with your organization. Create a new volunteer, build a valuable donor, find a new customer, bring someone on as part of your team, or engage with them as a beneficiary of your organization... No matter what you want to do, you're going to need a plan and a method to track your relationship as it develops and flourishes.

Think about the steps required to guide a prospective volunteer through their journey—from discovery to engagement.

Perhaps this is straightforward for your organization. Maybe it's complicated. Regardless, trying to do so can quickly get out of hand without some kind of tracking and automation software.

There are a variety of systems you can use to help manage this Bonding process. They range from the very "hands-on," requiring lots of manual work, to automated and hands-off. Costs are just as varied, and can be everything from free to quite expensive. Most good ones provide you with the ability to migrate and upgrade as your needs change.

But you need to have *something* in place to ensure you take full advantage of your opportunities.

Here are a few options.

Keeping Track With a Customer Relationship Management (CRM) System

Customer Relationship Management systems track details about your connections—most importantly, for purposes of Bonding, the specific relationship each of those connections has with your organization.

All your contacts, relationships, and conversations are stored in your CRM; you can easily find out *anything* about *anyone* at *any time*.

Having this knowledge at your fingertips dramatically streamlines the process of deepening relationships with your various audience members.

A CRM is especially important if you have an existing engagement team that tracks client "touches," as it can ensure that every team member stays up-to-date on all of a particular person's interactions with your organization.

For example, many nonprofits see their stakeholders begin with an interest in the organization and a connection. This interest often transitions to a volunteer engagement, which then transforms into a membership or donor relationship. At this point, a typical stakeholder has at least two "titles" within your organization—volunteer AND donor. That means they'll likely interact with several members of your organization as they continue (and hopefully deepen) their relationship.

Can you understand how challenging it might become to foster both of those relationships without a system?

Now imagine that that volunteer and donor goes on to join your team in some official capacity, say as an employee or a board member. The chances of somehow letting them down—at *some* point on their experience journey—are multiplied exponentially.

This is where a CRM can shine. With a lot less work than you'd expect, you'll have all the information you need to strengthen and transform this individual into a mega-donor, help them get their company on-board as a corporate donor, and more.

Initially, using a CRM might seem daunting. Still, once you and your team commit to using one consistently, you'll quickly realize the advantages of collecting and storing your stakeholder outreach information in a single, easy-to-access place. And here's a final piece of advice about CRMs: The best system is the one you *use*. Make sure your team is on-board with whichever one you select, and you'll be well on your way to success.

Automating Your Marketing

In the early phases of running your organization, "manually" reaching out to and engaging with your stakeholders will probably be enough. You may experience some challenges building your audience. But in the early phases, their numbers may be small enough that your team can still keep up.

However, if your goal is to expand your mission to help as many stakeholders as possible, marketing automation will become more and more important.

For our purposes, "marketing automation" refers to anything that allows you to, ahem, *automate* your messaging and outreach processes.

Marketing automation systems typically track a stakeholder's place in the Audience Engagement Cycle and present materials appropriate to that stage.

For example, let's say a visitor downloaded an eBook from your site in the past, but they haven't yet taken the next step and become a donor. Marketing automation could help you keep in touch and provide information about other content offers they might find interesting. This could help you deepen your relationship with that constituent—Bond with them—until they felt more ready to commit financially.

The goal is to use software to help you understand your stakeholders' experience so you can tailor your activities accordingly. Think how much a constituent might feel you "get" them if they received a written event invitation a few days after exploring information about that event on your site. That kind of approach encourages *real* engagement with you—but it's impossible to perform it at scale manually. You might feel that "automation" is robotic, but it's precisely the opposite; automation tools free you up to be more human.

One caveat: automation can get complex very quickly, so it's always an excellent plan to start small and build upon your successes.

A perfect place to start? With the initial connection request. When a visitor downloads an ebook, for example, have your automation system put their details into your CRM, then immediately send them a follow-up email with a link. Then have a series of emails sent out on a schedule to ask what they thought of the download, inquire about their experience, offer some other content you feel would be valuable, and so on. Automation helps this process flow smoothly, without any additional effort or attention required from your team. (It can even send out alerts to your team if a visitor takes a specified action. This will promote timely, additional outreach to specific individuals.)

Automation is a powerful tool in your kit and—bonus!—is a standard component of many CRM systems.

Nurturing With Email

Email can be about more than "thank you for downloading." A thoughtful series of emails focused on useful, relevant issues can build trust with prospects and help them engage further as volunteers or donors. All modern email automation programs will let you send these kinds of series.

Regardless of what you send, if you create more personal materials—that is, if they appear to come from an individual within your organization, rather than the organization itself—you'll typically see more opens and clicks.

(Speaking of clicks, if you move away from a “choose your own adventure”-style newsletter and focus most of your email copy on a single item of interest, current trends indicate you’ll also see more engagement.)

Tracking Your Performance

Do you know which marketing efforts attract the most valuable connections? Is your team effectively transforming those ideal visitors into stakeholders?

If you’re not able to track your marketing efforts’ performance, you won’t be able to understand where adjustments need to be made—or where you should invest more of your energy and assets to fuel growth.

At the end of the day, if you believe that purpose-driven marketing should create a return for your organization, you should embrace closed-loop reporting as a way to identify the efforts that produce the most significant returns. It will show you where your efforts are falling short of expectations—and where you should be doing even more to Attract, Connect with, and Bond with your stakeholders.

You can use quite a few mechanisms to gain insight, from tracking interactions in your CRM, to setting cookies that power dynamic content, using heatmaps to understand on-site behaviors, or tracking conversions in Google Analytics.

Data is your friend—so setting up systems by which you and your team can get the fullest understanding of behaviors is essential. Measuring performance can help you make fully educated decisions about what activities are most effective, which ones need some fine-tuning, and which may need to go away so you can focus on what works.

These systems and activities help create and support your ability to Bond with your connections and transform them into active, engaged stakeholders within your organization. And even though it may seem that your work is done, the next phase of the Audience Engagement Cycle can be where the real magic happens.

ACTIVITY #4: INSPIRE

By now, you have systems and tools in place to Attract visitors, Connect with them, and Bond them to your organization.

Now is not the time to take your foot off the throttle, however. Just because someone has already written you a check doesn't mean you should forget about them.

A good purpose-driven marketing strategy will continue to build trust and Inspire engaged participants to become promoters for your organization.

After all, any person you've Bonded with can become an ally and share your story with other people. So if you remind your stakeholders of the work you do and give them resources to share with new potential donors, volunteers, and those in need of your services, you'll be better able to spread the word about what you do.

This makes sense financially, as well. With any relationship, there's an investment associated with creating it and building it.

However, where the for-profit world tends to think of those investments in terms of CAC, "Customer Acquisition Cost," we feel this is counterproductive. Thinking of your marketing efforts as a "cost" leads to a negative emotional relationship with marketing.

As we stated earlier in this book, marketing is an investment in the future of your organization—and it should be thought of that way at every turn. Even considering getting a "return" on that cost is limiting, as it locks you into a "cost mindset."

Instead, you should be trying to maintain a "multiplying mindset," where you think longer-term about your relationships with your stakeholders.

In other words, instead of Customer Acquisition Cost, consider Stakeholder Acquisition Investment.

You've spent time, energy, effort, and capital Attracting, Connecting, and Bonding; the work you'll do in the Inspire phase ensures that your organization makes the most out of those investments.

The notion here comes back to an old sales adage: "It's easier to sell to an existing customer than to bring on a new one." Continuing to nurture and build upon your existing relationships is vastly more effective than creating new ones. As much as it's crucial to find new stakeholders, it's just as important (or even more so) to Inspire your existing ones.

Inspiring Volunteers, Donors, and Other Stakeholders

There are countless ways to Inspire your stakeholders once they have become part of your inner circle. Continuing to create materials for this group will help you let them know how much they mean to your organization, as well as stay top-of-mind in their busy lives.

Just as you did in the Bonding phase, think of materials that answer your stakeholders' questions about the positive impact they're creating. For example, you can send volunteers and donors field reports and impact statements, or invite all stakeholders to participate in research and provide input into how your organization can do more good.

Stay in touch regularly to keep everyone in the loop with good news, needs, and opportunities to serve.

Here are a few other ideas for keeping your stakeholders Inspired:

- **Surveys.** To figure out what your stakeholders want, simply ask them. Use feedback and surveys to ensure you're providing stakeholders what they're seeking and that they're happy with the services you provide.

  Survey Monkey, Google Forms, and Typeform are three excellent tools to help collect information from your constituents and track their responses easily. However, a simple on-site form will also do.

Even one-question surveys can yield actionable information if they're properly constructed. (You can even collect information from your surveys you can use to follow-up with your stakeholders and re-engage dormant contacts.)

Surveys can be a valuable conversation-starter as well. Consider adding a field at the end, asking whether or not the participant would be willing to discuss their answers and experience with your organization. These conversations can unlock many great insights into engaging new members, volunteers, donors, and beneficiaries.

Finally, surveys can also be a useful tool that keeps stakeholders Inspired during downtime or delays in "regular" engagement. Ultimately, people like to feel "part of a movement," so surveys can present an excellent opportunity to help create this experience.

- **Focus groups.** Another great way to Inspire and foster community is to hold focus groups with different segments of your stakeholder base. This process requires more work than surveys, but focus groups can create valuable information-gathering opportunities and stakeholder engagement.

  Make sure you record your sessions, so you don't miss a word.

  It's also usually a good idea to have someone other than the facilitator take notes and curate interactions, especially if your focus groups will take place online.

- **Social engagement.** One of the most potent ways to Inspire your promoters is to provide them with materials to quickly spread your message. This can be as simple as encouraging them to share your message on social media. If you're feeling more ambitious, you can help them use their email by giving them pre-written messaging and materials. (Think of the kind of system that helps someone look up their Representative in Congress and send a scripted message.)

- **Social monitoring.** Keep your finger on the social media "pulse" by actively listening for your stakeholders' questions, comments, likes, and dislikes—then reaching out to those stakeholders with relevant content.

  Many services have social monitoring tools built-in, including Hootsuite, Buffer, Google Alerts, and many CRM systems. These systems enable you to "watch" for key terms and phrases that are relevant to your organization or its mission, then reply with valuable materials to keep people Inspired.

- **Regular, public recognition.** Here's a real-world example where an organization with which one of us (Stu) volunteers does a great job recognizing volunteer activities and even "gamifies" the volunteer experience.

  At each volunteer day, the Volunteers for Outdoor Colorado (voc.org) takes a moment to recognize repeat volunteers and calls out how many projects on which each has worked. When certain milestones are reached (project 3, 5, 10, 25, etc.), special badges are presented to each volunteer. This creates an opportunity to encourage that volunteer to return to work on more projects, and Inspires other volunteers to return so they too can be recognized and "earn" those prizes.

- **Content sharing.** Finally, be sure to keep all your stakeholders engaged with regular connections, asks, and check-ins. Keeping them in the loop—and asking for regular micro-commitments of time, energy, or money—can help maintain the initial Inspiration they felt when they first connected with you.

PART 3: TIME FOR ACTION

The intersection of the right message, shared in the right place, at the right time is where the magic of purpose-driven marketing happens.

TIME FOR ACTION

When you get a firm understanding of your prospects' motivations, that understanding will inform both your messaging and its format.

When you know where your stakeholders go to get information, you'll know where to post and promote your materials.

And when you're consistent with your cadence, you'll be ready when *they* are—which is the key to success with the Audience Engagement Cycle, and indeed with purpose-driven marketing as a whole.

The purpose-driven marketing methodology covers every step on the road from stranger to stakeholder. It empowers marketers to Attract visitors, Connect with them, Bond with stakeholders, and Inspire promoters.

But purpose-driven marketing doesn't just *happen*—you *do* it. And you do it by creating and delivering content that will appeal to precisely the right people (your stakeholder personas) in the right places (channels) at just the right times (lifecycle stages).

So now it's time to take action.

There is a lot to do to create a successful purpose-driven marketing campaign, and you shouldn't take the volume of effort lightly.

That said, it's easy to look at the size of the challenge before you and become overwhelmed. So choose your inspiring cliché—the longest journey begins with a single step, and you can't build a whole house at once.

In other words, purpose-driven marketing is an approach that is achievable for every organization. And it's one where investing will multiply your ability to fulfill and expand your organization's mission.

So map out your plan and commit to taking that first step. And if you need help, by all means, find us on the Web at relishstudio.com and wrixon.com and reach out.

ABOUT THE AUTHORS

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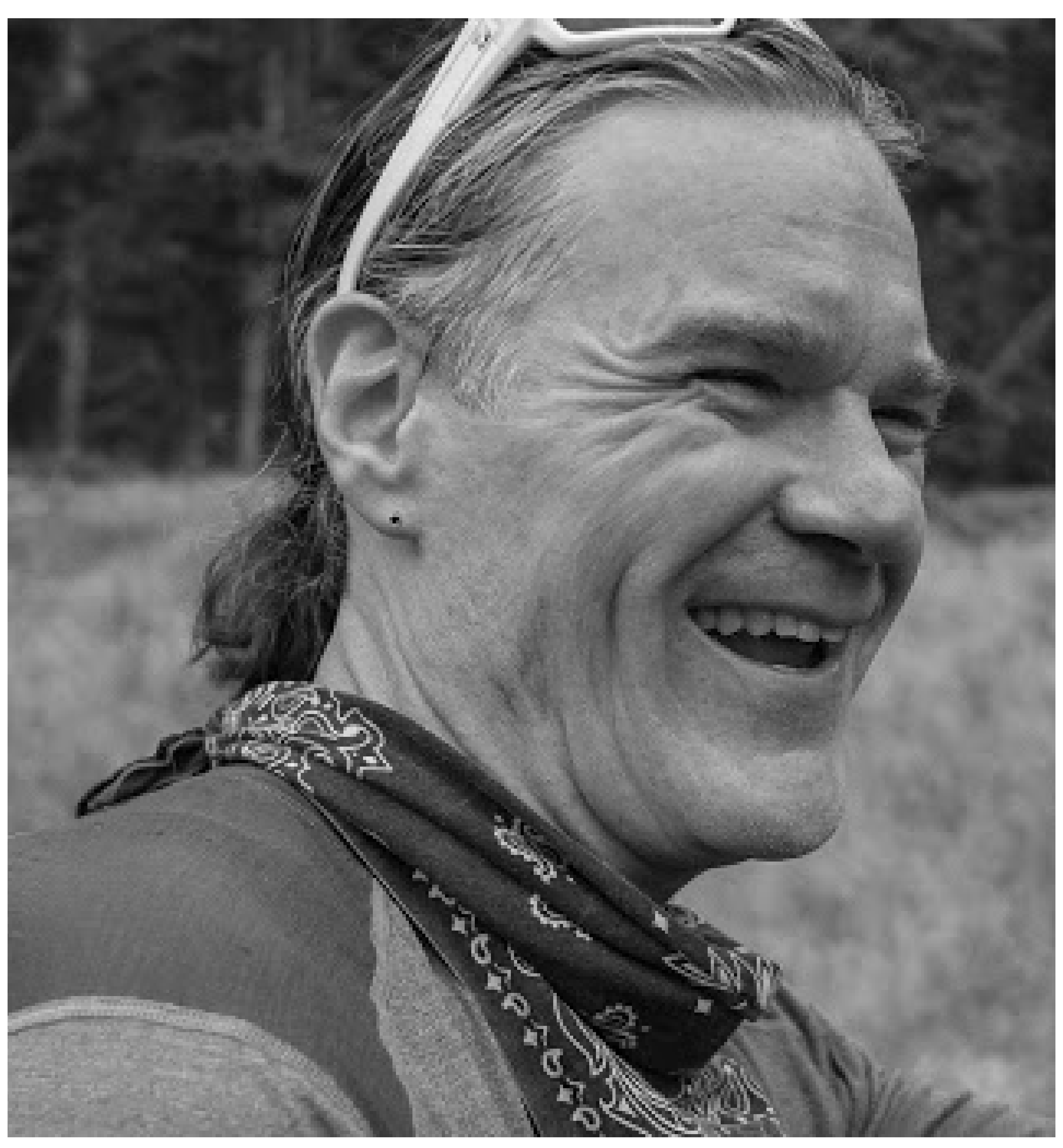
| STU SWINEFORD



Stu Swineford is a mountain-fella, cinephile, and Co-Founder of Relish Studio, a digital marketing firm that creates conversion-focused marketing solutions for nonprofits seeking to expand their mission.

His first memory is of his father holding him on the front lawn, pointing to the middle distance, and saying, “See that? That’s a tornado!”

It’s been a whirlwind ever since.

Stu started his marketing journey in sales while working at a mail-order bike company while deciding whether to go to med school.

He opted for “not,” but when approached about writing about the bikes, he jumped at the opportunity to add “copywriter” to his list of responsibilities.

When the graphic designer quit several weeks later, he figured, “If I know how to turn on the Mac, I can certainly figure this out, right?” and found himself the Head of Marketing of one of the country’s top 3 mail order bike companies at the age of 24.

Print design quickly shifted to digital. After gaining experience leading teams throughout the full production cycle of websites and app development, Stu lost his mind and decided that running a digital marketing agency was a good idea. Relish Studio was born. (See that? That’s a tornado.)

When he's not helping purpose-driven leaders fuel the growth of their organizations, Stu can be found traipsing around the woods near the cabin in which he has lived with his wife Rachel, and their menagerie of pets since 1993. He may also be watching movies, reading, or polishing the details on his latest (possibly ill-advised) master plan for world domination.

Interested in learning more? Stu can be found at:
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and relishstudio.com

He also hosts a podcast! If you run a nonprofit and would like to brainstorm ways to unearth some gold for your organization, join Stu as a guest. Here's a link for more: https://relishstudio.com/podcast/

AARON WRIXON

To say today's web is noisy is an understatement. Unless companies take a different approach to content, for-profits and nonprofits alike now struggle to get noticed.

But what makes some content rise above the rest? Copywriter and content strategist Aaron Wrixon knows.

He began his career in 1997, when a too-kind girlfriend refused to say "Get a job" and chose instead to cut a classified ad out of the paper and give a pep talk. "You're a great writer; you should apply for this." That girl is long since an ex-, but Aaron's obsessions with writing for a living.

And since that time, Aaron has been paid for crafting well over 7 million words, or approximately 229 copies of Shakespeare's Hamlet. He has written for more than 100 different industries in the US, Canada, England, and Australia. (That's a whole lotta "to be's" and "not to be's.")

Somewhere along that journey, he met Stu, although things didn't *really* start cooking until they shared drinks that neither one had a right to be consuming in a Denver speakeasy. (Aaron had just gotten off a plane from Toronto and was struggling with altitude; Stu was taking contraindicating medication and struggling with, um, attitude.)

Now they try to talk regularly, usually about movies, books, and the greatest Canadian television show ever created, Letterkenny.

Aaron resides in a hippie town in Ontario, Canada, with solar panels on the roof powering a battered Macbook. He lives with a spouse, two children, two dogs, and a bearded dragon, all of them female, and grunts testosteronishly to compensate.

Additionally, his mom says he's handsome, and one time he drove slow on the driveway when his dad came to Walbrook.

MISSION UNCOMFORTABLE:

How Nonprofits Can Embrace Purpose-Driven Marketing to Survive and Thrive

By Stu Swineford and Aaron Wrixon

For more information on Mission Uncomfortable,
including finding out how to launch a purpose-driven marketing campaign,
visit missionuncomfortablebook.com or call 303.825.4414.

Relish

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