

20
20



FIREFLY PARTNERS' GUIDE TO

NONPROFIT DIGITAL MARKETING TOOLS

www.fireflypartners.com

To our incredible and strong nonprofit community:

As I write this, we are deep into the first month of lockdown, social distancing, and self-imposed isolation due to the COVID-19 outbreak and pandemic. These are scary, uncertain times for us all. And yet, as we all brace for a peak in cases and the impending fallout, we are all also settling into this new reality the best we can.

We've been speaking with a lot of our nonprofit clients and friends and learning about the challenges for fundraisers and nonprofit marketers on the frontlines.

What does this moment in time look like for you?

- Your nonprofit is likely adjusting to a remote working environment for the first time,
- Events from galas to 5k walks to community trainings are all either being canceled or pivoted to a digital / virtual / livestreaming version instead,
- Maybe you don't know what to say to your constituency or how to ask for money and support in these economically challenging times

We're with you in this, and, while uncertainty is pervasive across many aspects of our lives right now, we are certain about one thing: **digital is going to be more important than ever** in our new reality. Fine-tuning your digital landscape is critical as it is now your primary – perhaps your only – means of communicating and connecting with your donors, supporters, and community.

We put this guide together to help you all evaluate some of the top digital marketing platforms on the market today and to assist you with any digital pivots that are now critical for your organization. We are here to help your team navigate the strategies, messaging, and approach to embrace this new normal. Let us help you define your most critical functional requirements and put together a plan that works for your organization.

These are unprecedented times, but we are one hell of a strong community and we will see each other through it, together. Be kind to each other and most importantly be kind to yourself.

In solidarity,



Jen Frazier
President + Founder,
Firefly Partners

Hello and welcome to our 2020 DIGITAL MARKETING TOOL GUIDE!

If you're reading this guide, it's probably because you're curious about the latest and greatest nonprofit digital tools. Whether you're just starting to think about a new tool, or you've already had demos with your favorites and want to make sure you don't miss anything, we think this resource will help you move your process forward.

Our own nonprofit experience means we know it's nearly impossible to juggle everything on your plate—the right message for your next fundraising campaign, the right layout for your donation forms, or the right timing for your next advocacy campaign. That's why we put this guide together and zeroed in on 13 of the best digital marketing platforms that have been purpose-built for nonprofit communicators like you.

Firefly Partners is women-owned and women-run, and our team of digital marketing experts knows these tools inside and out. We can help you answer questions like: How do I know which tool is right for my organization? How do I choose a tool that will support the growth of our programs? How can I pick a platform that will work well across departments? And how do I create and execute a plan for a successful migration once I have picked the right next tool?

Your online tools are a vital component of your larger digital ecosystem and too often we see nonprofits making tool decisions in isolation of their other systems or without surveying the needs of everyone in the organization. Selecting a new platform won't solve all your problems, but ensuring the new tools are setup for your success is a great start.

So check out the guide and give us a call. We want to help you get the best ROI out of your digital marketing solutions and ensure your long-term success. Helping to take a few items off your to-do list and making it easier for you to communicate, raise money, and further your mission is what it's all about.

Sincerely,
Your friends at Firefly Partners

[LET'S TALK >](#)

303.325.5934
info@fireflypartners.com

WHAT'S INSIDE

Dive into 13 different digital tools and their capabilities in these four areas:

Email Marketing

Fundraising

Peer-to-Peer + DIY

Advocacy

In addition to an overview of what each tool has to offer and what sets it apart, these profiles detail:

Pricing Structure

Migration Process

Updates + Upkeep

Client Support

Common Integrations

How to Use the Guide

The Grid

For a high-level overview of the tools, reference the grid. While each tool has many more functions, this summary page can help you determine where to start.

The Content

Whether you're looking for one tool, or a few, we suggest reading through each profile to get a clear picture of what differentiates each from their competitors.

The Process

Use the last section of this resource to learn more about the tool selection and migration process from beginning to end.

The Functions

A sidebar with an expanded list of tool capabilities helps you understand what each platform can do, down to the smallest of details.

Let's Talk!

Our team understands that investing in new digital marketing tools can be an overwhelming process. Are you ready to move, but need help managing the details? Do you want to understand if the tools you need can work together successfully? Are you interested in custom forms, landing pages, and email templates?

That's where we come in! Click on or paste this link in to your browser to find out how we can help you today!

<https://fireflypartners.com/tool-guide-follow-up/>



	EMAIL MARKETING	FUNDRAISING	PEER-TO-PEER AND DIY	ADVOCACY
CLASSY <i>p6</i>		●	●	
DONORDRIVE <i>p8</i>	●	●	●	
ENGAGING NETWORKS <i>p10</i>	●	●	●	●
EVERYACTION <i>p12</i>	●			●
KINDFUL <i>p.14</i>	●	●	●	
LUMINATE ONLINE <i>p16</i>	●	●	●	●
ONECAUSE <i>p18</i>		●	●	
PARDOT <i>p20</i>	●			●
PHONE2ACTION <i>p22</i>	●			●
RALLYBOUND <i>p24</i>		●	●	
SALESFORCE MARKETING CLOUD <i>p26</i>	●			●
SALSA <i>p28</i>	●			
SPRINGBOARD <i>p30</i>		●	●	●

- CONSTITUENT MANAGEMENT
- EVENTS
- FORMS
- FUNDRAISING CAMPAIGNS
- PEER-TO-PEER + DIY
- SOCIAL MEDIA INTEGRATION

Classy

www.classy.org

In their words:

Classy offers world-class online fundraising tools for nonprofits, modernizing the giving experience to accelerate social impact. From crowdfunding to peer-to-peer fundraising, event registration and management, and one-time or recurring donations, nonprofits of all sizes can use Classy to manage all of their online fundraising under one roof.

What sets it apart:

Using Classy, organizations can grow their online donations through branded forms or crowdfunding campaigns. Time-based or evergreen campaigns are also available and give supporters the power to donate and fundraise on behalf of an organization. Through Classy Events, users can create customized event pages to collect registrations and track performance. Classy Passport supports donations in up to 130 different currencies and organizations can process donations with Classy's in-house payment processing solution.

How you can use it:

Once you've signed up, Classy donation forms, fundraising campaigns, and events are easy to set up, easy to use, and easy to manage. You don't have to be a designer to build beautiful, mobile-responsive fundraising campaigns that highlight your mission. The tool allows nonprofits to meet supporters where they are with mobile-responsive pages, social sharing tools, and options for how they want to support a cause. With peer-to-peer campaigns and fundraising events, supporters can create personalized individual or team fundraising pages to raise money.



PRICING

Pricing for Classy is customized to fit the needs of each organization and includes a flat monthly subscription fee. Classy also offers Pay As You Go pricing for organizations to get started and test out the tool.



SET UP + MIGRATION

Users can set up a Classy account on their own timeline through self-guided tutorials in their account. Engagement Managers are available to guide nonprofits through setup, including migrating from a previous tool.



INTEGRATIONS

Nonprofits can connect Classy to their favorite apps, or leverage an open API to build organization-specific integrations. Classy integrates with Salesforce CRM, Virtuous CRM, Kindful CRM, Raiser's Edge CRM, Hubspot, Facebook Fundraising, Google Tag Manager, MailChimp, Constant Contact, Google Analytics, Double the Donation, Amply, Giving Assistant, and Charity Auctions Today.



UPDATES

The Classy team is constantly innovating and rolling out new features that automatically appear in user accounts. Updates and documentation about new releases can be found in the in-product Resource Center.



ONGOING SUPPORT

On-demand support articles and product walkthroughs are available inside an account. Email support plus live chat and 1:1 phone support is available during business hours. The Customer Success Management team also provides best practices for using the tool.

- **CONSTITUENT MANAGEMENT**
- **EMAIL**
- **EVENTS**
- **FORMS**
- **FUNDRAISING CAMPAIGNS**
- **PEER-TO-PEER + DIY**
- **MARKETING AUTOMATION**
- **SMS**
- **SOCIAL MEDIA INTEGRATION**

In their words:

Using DonorDrive, nonprofits can empower their fundraisers to raise more, build fundraising events with ease, and give donors a better giving experience. Launch beautiful, mobile-first donation campaigns in minutes and give donors a way to quickly complete one-time and recurring donations.

What sets it apart:

Charity streaming has become the new telethon, and with Live Fundraising participants can add their charity stream to their organization's branded fundraising pages. Paired with Express Donate, Fundraising Milestones, and Donation Incentives, this creates an experience that drives high engagement and builds donor trust. With the Fundraising Motivation Engine, users can build notifications to encourage their supporters to raise more through configurable email and text alerts, send fundraising tweets on their behalf, and even award badges for fundraising progress.

How you can use it:

DonorDrive's peer-to-peer platform offers personalization, social media integration, and mobile-responsiveness. One-time campaigns feature branded landing pages that require no coding. No matter the campaign type, nonprofit teams can manage configuration, automation, and results and make updates in real time. 2020 will see the launch of DonorDrive University, where clients and partners can take courses to make the most out of the tool.



PRICING

An annual contract gives users access to all tool capabilities and support. There are additional costs incurred for implementation. Platform fees are charged for donation processing.



SET UP + MIGRATION

DonorDrive migration varies based upon specific client needs and number of fundraising campaigns. Each step in the migration process is managed by a client success advisor.



INTEGRATIONS

DonorDrive's platform is integration agnostic. The platform provides export APIs to the most common CRM applications as well as more specific integrations, including Facebook Fundraisers. There currently is no limit to the integrations that DonorDrive can support.



UPDATES

DonorDrive is entirely cloud based, and updates are deployed automatically. Updates are ongoing with new product features being added monthly based upon client demand.



ONGOING SUPPORT

Support is available via phone, email, and live chat. New clients get extensive training through the setup of their first event. On-site group trainings are available for organizations that have many admins that need to get up to speed on the new tool.

- ADVOCACY
- CONSTITUENT MANAGEMENT
- EMAIL
- EVENTS
- FORMS
- MARKETING AUTOMATION
- PEER-TO-PEER + DIY
- SOCIAL MEDIA INTEGRATION

In their words:

Engaging Networks is a flexible, completely customizable, and innovative software platform for nonprofits. It can handle an organization's advocacy, fundraising, email, peer-to-peer, events, and data management systems needs, or integrate with existing tools.

What sets it apart:

Engaging Networks can be a one-stop shop for a nonprofit's digital marketing strategy and it has a rapid development cycle, so users regularly gain access to new features and functionality. Still in Beta, Engaging Networks launched advanced marketing technology powered by Machine Learning in 2019. This technology delivers automated and highly personalized marketing content to users via email.

How you can use it:

Teams can create fully integrated advocacy campaigns and branded landing pages. Email marketing includes a drag and drop interface, built-in testing, conditional content, and marketing automation. Engaging Networks can be deployed quickly out of the box or can be deeply customized for your needs. Using flexible APIs and flexible templates, nonprofits have complete control over the look and feel of their forms, behaviors and code, or how data is handled. This allows clients to spin up a form quickly in a pinch or to push the limits and try new things using deeper customization.



PRICING

Subscription is annual as part of a multi-year contract term.



SET UP + MIGRATION

Onboarding can take anywhere from six weeks to nine months, based on needs. Robust assistance runs from setup through final testing. Migration can be done by the nonprofit or a certified partner agency.



INTEGRATIONS

Using an open and flexible API, Engaging Networks can easily integrate with an organization's database of record. Existing integrations include Raiser's Edge via Omatic, JMG or other tools, Portfolio by Amergent, Blackbaud CRM, ROI Solutions, Salesforce, and StratusLive. In addition to integrations with databases, Engaging Networks integrates with Gravity Forms via a WordPress Plugin.



UPDATES

Rapid development cycle with new releases, updates and bug fixes every 6-8 weeks. New features are a mix of client-driven and market-driven innovations. Clients are informed of new releases by email and video overviews. Updates and releases are typically pushed out with no downtime or interruption.



ONGOING SUPPORT

Live support 24/7 via email. Clients will reach a staff expert via support channels to help diagnose and troubleshoot problems. There is also an Online Academy where teams can be trained on how to use the tools at their own pace.

- ADVOCACY
- CONSTITUENT MANAGEMENT
- EMAIL
- EVENTS
- FORMS
- FUNDRAISING CAMPAIGNS
- MARKETING AUTOMATION
- PEER-TO-PEER + DIY
- SMS
- SOCIAL MEDIA INTEGRATION

In their words:

EveryAction is a unified CRM with tools built by and for nonprofit professionals. With a full suite of fundraising, digital, advocacy, and organizing tools all in one place, EveryAction allows users to obtain a 360 view of supporter interactions, run multi-channel campaigns, and raise more money with optimized emails and forms.

What sets it apart:

EveryAction's Marketing Automation gives organizations the ability to create workflows that streamline repetitive tasks and communications. This means more time can be spent on driving strategy. With Marketing Automation on EveryAction, nonprofits can easily leverage their data into action with personalized communications to welcome or re-engage subscribers or convert supporters into donors. An intuitive visual workflow builder is simple to use and provides endless possibilities.

How you can use it:

EveryAction is a unified platform. This means that organizations don't need third-party tools or integrations to run offline and online fundraising, digital programs, and more. In 2020, EveryAction will be launching its own native SMS tool. Users will be able to send broadcast text messages to engage their supporters. EveryAction's SMS tool is the perfect way to amplify messages and supplement email and direct mail strategies without relying on a third-party tool.



PRICING

EveryAction's pricing model is dependent on the size and needs of an organization's database.



SET UP + MIGRATION

Getting started can take between two to four months. Options include account-managed migration, self-set-up, or working with an implementation partner.



INTEGRATIONS

Open APIs allow nonprofits to pull data from their lists as needed. Typically implemented by a nonprofit's programmer, these APIs are designed to integrate with custom solutions that organizations may be using elsewhere. EveryAction provides unlimited API calls at no additional charge. Other common integrations include: Salesforce, WealthEngine, Call Hub, Frakture, Raiser's Edge, ROI Solutions, and BBCRM.



UPDATES

Updates and improvements happen on a weekly basis. Major updates and new functionality launch regularly.



ONGOING SUPPORT

Unlimited phone & email support. Individuals do not have to be the designated user or account contact to speak with the support team. Live, web-based weekly trainings offer the full classroom experience.

- **CONSTITUENT MANAGEMENT**
- **EMAIL**
- **EVENTS**
- **FORMS**
- **FUNDRAISING CAMPAIGNS**
- **PEER-TO-PEER + DIY**
- **SOCIAL MEDIA INTEGRATION**



In their words:

Kindful was founded with a simple idea in mind: Nonprofits should be able to spend less time focused on their database and more time focused on their mission. Kindful offers several solutions to help nonprofits amplify their fundraising efforts, simplify their donor management, and maximize their impact.

What sets it apart:

One of Kindful's biggest features that sets the tool apart is the number and quality of integrations that connect the tool with many other platforms that nonprofit organizations use. For more advanced users, they have a very robust API that can be utilized to import and export both donor and transaction data. The tool's reporting capabilities are also flexible and powerful, giving organizations the ability to do highly effective grouping and segmenting of donors so that they can send the right message to the right donors at the right time.

How you can use it:

Kindful's donor management capabilities center on data that helps build relationships. Dashboards show all important data in one place and there is no limit to admin users, so an entire development team can have access to this important information. Segmentation helps nonprofits customize their messages based on donor behavior. Users can implement Kindful's fundraising tools for donation pages, event ticketing and registration, recurring giving, peer-to-peer, crowdfunding, and text-to-give. Unlimited reporting templates help organizations access information about donor lifecycles.



PRICING

Contact-based pricing. Every pricing package includes all of Kindful's features.



SET UP + MIGRATION

After paying a one-time starting fee, the process is customized to meet the client's needs. Most nonprofits onboard within 30 days.



INTEGRATIONS

Kindful integrates with more than 45 tools and systems. The categories include email providers like Mailchimp and Emma, payment processors like Stripe and PayPal, fundraising tools like Classy and CrowdRise, accounting tools like QuickBooks, and more.



UPDATES

Kindful releases new features and improvements to their software each week. Since Kindful is a cloud-based software, these improvements are immediately available in each user's account when released.



ONGOING SUPPORT

The Kindful Care Team is available Monday through Friday from 8am to 5pm CT. Free phone and email support is included in all of Kindful's pricing packages.

- **CONSTITUENT MANAGEMENT**
- **EMAIL**
- **EVENTS**
- **FORMS**
- **FUNDRAISING CAMPAIGNS**
- **MARKETING AUTOMATION**
- **SOCIAL MEDIA INTEGRATION**

Blackbaud Luminate Online®

www.blackbaud.com

In their words:

Blackbaud Luminate Online provides everything you need to acquire more constituents, build online fundraising campaigns, and nurture donor relationships. With TeamRaiser peer-to-peer and advocacy add-ons you can create a full nonprofit engagement experience for your supporters and organization.

What sets it apart:

Luminate Online's campaign tools and data available for segmentation allow nonprofits to personalize their content and target their audience with specificity. This drives better engagement, inbox placement, open rates and therefore fundraising totals. Luminate Online's Sustaining (Recurring) Revenue tools allow teams to automatically process transactions. There is also a donor self-service management tool for all recurring donations to alleviate some burden on your staff by allowing individuals to update their information, donation amount, and frequency on their own.

What you can do with it:

Nonprofits can create and send email campaigns that are personalized to supporter interest, along with automations like a Welcome Series. Luminate Online offers dynamic forms that auto-fill donor names and amounts to simplify the donation process. Users can also create webpages and microsites to better engage their donors. A/B testing and custom reports help users fine-tune their messages and track performance over time. A recently launched social posting feature allows organizations to view social media accounts in one area to streamline marketing campaigns across multiple channels.



PRICING

Luminate Online, when used on its own, is priced based on the number of useable email addresses. When bundled with other Blackbaud tools it is priced based on contacts in an organization's CRM.



SET UP + MIGRATION

Set up can take from eight to ten weeks to three to four months depending on custom requirements and assets. Nonprofits can work with Blackbaud staff or a certified implementation partner.



INTEGRATIONS

The most well-known integration used by the largest percentage of Blackbaud customers is with Raiser's Edge and Raiser's Edge NXT. This common integration combines marketing and fundraising capabilities with Blackbaud's most prominent CRM.



UPDATES

Updates are deployed on a quarterly basis with mid-release patches.



ONGOING SUPPORT

Strategic ongoing services guide teams through the design of an initial email or fundraising campaign. Videos, how-to guides, and message boards are available to users through the Community Portal.

- EVENTS
- FORMS
- FUNDRAISING CAMPAIGNS
- PEER-TO-PEER + DIY
- SMS
- SOCIAL MEDIA INTEGRATION

In their words:

OneCause empowers great missions with powerful online and event fundraising software that makes giving easy. The tool has helped over 6,000 cause-driven organizations of all sizes amplify their message and raise more funds. Because building a better tomorrow happens one cause at a time.

What sets it apart:

Organizations who use OneCause give their supporters the flexibility to fundraise anywhere at anytime, including on mobile devices. From auctions, galas, and events, to online fundraising, peer-to-peer campaigns, and Text2Give™, giving is easy for everyone. Their full suite of event and online solutions helps nonprofits reach and engage digital donors.

What you can do with it:

OneCause has event fundraising software that helps with the administrative tasks related to managing event fundraising campaigns. Organizations can set up branded event pages, manage table assignments and seating, promote the event on social media, and track everything from registration, to donation, to check out. Their peer-to-peer solution works for in-person events, virtual events, and honor or memorials DIY campaigns. Features include social media integration, gamification, and mobile-responsive personal pages. Built-in analytics highlight donor trends.



PRICING

Pricing is offered as an annual subscription based on a nonprofit's fundraising needs. There are a variety of packages to choose from.



SET UP + MIGRATION

For out-of-the-box solutions, nonprofits have immediate software access and online tutorials and video resources. For larger packages, OneCause has Customer Success professionals to help.



INTEGRATIONS

Users can move data between OneCause and Salesforce, Raiser's Edge, and many other leading donor databases. OneCause also offers a wide variety of integrations built specifically for their peer-to-peer fundraising platform including Facebook, Twitter, Instagram, Salesforce, Blackbaud Luminate Online, Mail Chimp, What's App, Amply, Double the Donation, Google Tag Manager, Google Analytics, Facebook Conversation Tracking Pixel, mixpanel WordPress, Google Fonts, Adobe Typekit, Apple Pay, and Android Pay.



UPDATES

A continuous deployment process includes constant releases of innovations and enhancements.



ONGOING SUPPORT

Clients have access to US-based live phone, chat, and email support, with extended hours to support west coast nonprofits (M-F 9am to 8pm ET). There is also 24-hour access to online resources and self-paced learning courses.

- **CONSTITUENT MANAGEMENT**
- **EMAIL**
- **EVENTS**
- **FORMS**
- **MARKETING AUTOMATION**
- **SMS**
- **SOCIAL MEDIA INTEGRATION**



In their words:

Pardot is a software as a service (SaaS) marketing automation and contact management software/platform by Salesforce. It offers many tools to nonprofit organizations including email marketing, ROI reporting, and artificial intelligence.

What sets it apart:

With its Salesforce integration, Pardot gives nonprofits deep insight into exactly which marketing efforts are leading to donations and fundraising success and which ones are not. Nonprofits can combine the campaign impact data with Salesforce data to get answers related to volunteer recruitment, fundraising totals, and much more. Pardot also lets you manage and track events, volunteers, and webinars all in one place. This is possible because Pardot can connect with tools like Eventbrite, WebEx, and GoToWebinar.

What you can do with it:

With Pardot, nonprofits can quickly build visually appealing, personalized and responsive emails, A/B test them, and automate them in targeted drip campaigns. In addition to reports that show email actions (clicks, opens, click-through rate, etc.), Pardot helps nonprofits understand how their supporters are moving from one type of engagement to another, such as website visitors to donors. This means that teams can more effectively reach the right individuals at the right time, and successfully track all related data.



PRICING

Based on the number of contacts a nonprofit has and the level of automation they want to do, nonprofits can choose from a variety of Pardot plans.



SET UP + MIGRATION

An organization can migrate to Pardot from another marketing automation platform/tool in as little as four weeks, but it is ideal to allocate six to eight weeks to ensure a smooth migration.



INTEGRATIONS

Pardot has a seamless integration with Salesforce. It also connects with webinar tools, event tools, social media apps, Google Analytics, Google Ads, and more. Pardot can be integrated with WordPress websites to enable code-free form and content hosting. The tool also offers integrations with keyword search and SEO applications.



UPDATES

Pardot updates just like Salesforce, with every Spring, Summer and Winter Release. The updates are automatically implemented.



ONGOING SUPPORT

Pardot's Support Team is available 24 hours from Monday to Friday at 8pm EST. Users also have access to Pardot Knowledge Base where they can find answers and submit tickets.

- ADVOCACY
- CONSTITUENT MANAGEMENT
- EMAIL
- EVENTS
- FORMS
- FUNDRAISING CAMPAIGNS
- MARKETING AUTOMATION
- PEER-TO-PEER + DIY
- SOCIAL MEDIA INTEGRATION
- SMS

In their words:

Phone2Action a digital grassroots advocacy organization that provides services to allow organizations to amplify their voices. They are a leader in communications tools and offer essential public affairs functionality.

What sets it apart:

Phone2Action's campaign pages are designed to make it as easy as possible for nonprofits to set up and launch advocacy alerts. Campaign pages are optimized so supporters can access them on any device. Constituents can contact their legislators via email, tweet, and patch-thru phone call. Phone2Action also has a text messaging tool. Advanced audience segmentation tools allow nonprofits to create lists of supporters to receive the right messages at the right time.

What you can do with it:

Phone2Action offers different modules based on an organization's needs. Their Advocacy Module includes campaign creation and reporting. The Communications Module includes mass text message and email capabilities. Their Stakeholder Module includes their public affairs tools. Phone2Action makes it simple to create custom alerts that yield high levels of engagement. And, in addition to email and tweet functions their advocacy platform also allows supporters to complete webforms and comment on regulatory forms.



PRICING

Phone2Action's tools are sold by module. Pricing is flexible and based on an organization's needs.



SET UP + MIGRATION

New clients are set up with a 12-month plan. Beginning with goal setting in a kickoff call, they are guided through setup by a Client Success Manager.



INTEGRATIONS

Phone2Action integrates with Blackbaud Luminate Online and is listed on the Salesforce AppExchange. Phone2Action connects easily with NationBuilder and can send supporters into MailChimp after they take an advocacy action.



UPDATES

Platform updates are released every other week but there are no outages or interruptions during these updates so clients are not affected.



ONGOING SUPPORT

Ongoing Support with Phone2Action includes strategic partnerships and regular check-ins with Client Success Managers. Training sessions and access to around-the-clock online chat support are also available.

- **ADVOCACY**
- **CONSTITUENT MANAGEMENT**
- **EMAIL**
- **EVENTS**
- **FORMS**
- **FUNDRAISING CAMPAIGNS**
- **MARKETING AUTOMATION**
- **PEER-TO-PEER + DIY**
- **SOCIAL MEDIA INTEGRATION**

In their words:

The Rallybound fundraising platform is built for nonprofits of all sizes, and supports fundraising events of any size, from local walk-a-thons to global fundraising campaigns. Nonprofits using Rallybound can (and do!) organize nearly any fundraising campaign imaginable, from single day walk-a-thons to birthday DIY campaigns to endurance treks to Mt. Everest.

What sets it apart:

Role Registration is Rallybound's solution for dealing with the different types of users that come to nonprofit events. From attendees to volunteers to virtual fundraisers, Role Registration makes it simple for organizations to send specific messages to these (and other custom) groups of people based on how they interact with an event or campaign. Plus, administrators can easily retrieve registrants based on their roles. For example, a nonprofit can search for all attendees or all volunteers, and take needed actions as appropriate based on that role.

How you can use it:

Peer-to-peer tools and a easy-to-use dashboard make it simple for nonprofit teams to create campaigns and for supporting fundraisers to email their friends and family for donations. A flexible guided registration system helps streamline the event sign-up process. Organizations can even create branded mobile apps for on-the-go donations. The tool offers many options for international fundraising and has powerful reporting features.



PRICING

Pricing is determined on a case-by-case basis. There is an annual license.



SET UP + MIGRATION

Rallybound's onboarding team partners with each organization for the setup and migration experience. Options range from quick-start to more comprehensive builds that can take months.



INTEGRATIONS

CRM integrations includes Salesforce, NCRM, Proprietary CRMs (Admire, Clearview). Email marketing integrations include Mailchimp, Constant Contact, and Pardot (through Salesforce). Payment processing integrations include NeonPay, Stripe, iATS, Worldpay, WePay, Auth.net, PayPal. Matching gift integrations include Double the Donation, Amply, and Hep Data. Rallybound can also be integrated with Google Analytics, Zapier, and Dropbox.



UPDATES

Users can expect weekly releases. Many of these releases will apply to all clients, in which communication is done weeks in advance to notify customers of the upcoming change. Other releases are opt-in only. Webinars will be held to answer any and all questions.



ONGOING SUPPORT

Rallybound has three tiers of support. Tier 1 is basic questions and information requests. Tier 2 responds to more complex needs for more mature clients. Tier 3 offers an assigned account rep to assist large clients with all of their unique needs.

- EMAIL
- MARKETING AUTOMATION
- SOCIAL MEDIA INTEGRATION



In their words:

Salesforce Marketing Cloud is a marketing platform that connects data in a meaningful way to give your organization a 360-degree view of every one of your constituents. Using Marketing Cloud, and its many integrated tools, organizations can engage with their supporters and personalize their experiences.

What sets it apart:

Salesforce Marketing Cloud is unique in that it offers a variety of tools, and allows each nonprofit to pick and choose the right bundle based on its needs. From digital ads, to social media, to mobile tools, Marketing Cloud can handle all communication needs and channels. When used in conjunction with Email Studio, nonprofits can build custom mobile-responsive templates, use drag and drop to segment their lists, and schedule automated personalized constituent journeys. Advertising Studio has re-engagement and lookalike functionality. The tool also has a very robust API for building bridges between apps without a pre-built integration.

How you can use it:

Choosing the right tools to bundle with Salesforce Marketing Cloud makes each organization's utilization unique. Email Studio provides the foundation for marketing with templates and conditional content. Journey Builder works in conjunction, allowing teams to create simple or complex individualized journeys based on actions taken. Social Studio, which can be used on its own, manages social listening, publishing, and engagement. Nonprofits can track social media interactions and attach that information to database records, allowing teams to connect with a constituent, no matter which platform they are using.



PRICING

The primary metric for pricing utilization is the number of “contacts” that are under management in Marketing Cloud, but there’s also a base price depending on what edition nonprofits start with.



SET UP + MIGRATION

Customers have the option to set up Salesforce Marketing Cloud themselves. Agency assistance is recommended for Journey Builder and other automated activities.



INTEGRATIONS

Salesforce Marketing Cloud can be used as a standalone tool, or can be used in conjunction with Salesforce CRM.



UPDATES

Marketing Cloud typically has at least four major updates each year. Account Managers work with administrators to make sure they are using the tool and its new functions to their full capacity.



ONGOING SUPPORT

Salesforce provides guides for setting up various connectors between Marketing Cloud and its various tools. Premiere support is available for users to ask questions and get help. Salesforce offers “Accelerators” which assist customers with common scenarios.

- ADVOCACY
- CONSTITUENT MANAGEMENT
- EMAIL
- EVENTS
- FORMS
- FUNDRAISING
- MARKETING AUTOMATION
- PEER-TO-PEER + DIY
- SOCIAL MEDIA INTEGRATION

In their words:

Salsa provides nonprofits with a complete software ecosystem to fulfill their fundraising, advocacy, and marketing needs to ensure complete connectivity between tools. With robust fundraising and advocacy solutions in addition to their own CRM platform, Salsa can support nonprofits' extensive tech needs.

What sets it apart:

Salsa's online fundraising dashboard provides real-time visualization of the key metrics indicating fundraising success, including funds raised by donor type, donation type, average amounts, number of donors, number of donations, and top fundraising forms. Access to this much data means organizations can adjust campaigns to make the most of the tool. Salsa offers grassroots advocacy tools to empower supporters to reach out to federal, state, and local legislators, as well as community leaders such as legislators, representatives, and corporate CEOs.

How you can use it:

Using Salsa, nonprofits can create emails and email templates using a drag and drop email editor. It's possible to trigger email series for new supporters or during specific campaigns to encourage engagement. Salsa also offers the ability to schedule and publish posts to Facebook, Twitter, LinkedIn, Pinterest, and Tumblr so organizations can let their supporters know what they're up to. Nonprofit teams can also encourage supporters to share their involvement by enabling social sharing buttons. Salsa users can also create custom forms that can be embedded in landing pages, lightboxes, or widgets.



PRICING

Salsa's pricing model is based on each organization's specific needs.



SET UP + MIGRATION

Salsa provides each new client with an Onboarding Specialist to guide nonprofit teams through data migration, setup and training.



INTEGRATIONS

Salsa is tightly integrated with both Salsa CRM and with Salesforce. In addition, Salsa has integrations with tools like Double the Donation, DonorSearch, WealthEngine, Zapier, and more.



UPDATES

Salsa's applications are regularly updated to provide new and expanded features. The Salsa knowledgebase is kept up-to-date with content to help you make the most of Salsa's fundraising tools.



ONGOING SUPPORT

Salsa users have continual access to an online learning portal with on-demand content, training, webinars, and consulting, and the Salsa Support Center which is available 8am-8pm ET, Monday through Friday.

- **ADVOCACY**
- **EVENTS**
- **FORMS**
- **FUNDRAISING CAMPAIGNS**
- **MARKETING AUTOMATION**
- **PEER-TO-PEER + DIY**
- **SOCIAL MEDIA INTEGRATION**

In their words:

Springboard gives organizations complete control over their donations, advocacy, and event registration experience, including one-step, multi-step, and fully custom forms. In addition, users get built-in mobile responsiveness, deep social integration, dynamic, personalized content, and the ability to create wholly new campaign types, such as social and peer-to-peer advocacy.

What sets it apart:

Springboard for Sustainers, the sustaining gift tool, features one-time to monthly gift upgrades, gift amount upsell, one-click renewal, and automated credit card updates. The tool also has its own payments solution that can integrate online, offline, single and batch payments in Salesforce. Springboard natively integrates with Salesforce and leverages its data collection functionality which allows for complete, end-to-end marketing automation, including tracking recipients across multiple channels and making real-time, data-driven decisions to increase conversions.

What you can do with it:

For organizations already using Salesforce or undertaking a Salesforce implementation, Springboard uses Salesforce as its CRM, allowing organizations to draw actionable insights from their data. Users can build flexible fundraising forms and personalized donor experiences. Advocacy campaigns can target federal, state, and local decision-makers. Springboard also offers peer-to-peer, DIY, and ticketed event solutions. Teams can build custom, mobile-responsive, multi-lingual, and multi-currency forms supported by a built-in payments platform.



PRICING

Organizations pay a single monthly platform fee based on the features they need, with tiered pricing based on transaction volume.



SET UP + MIGRATION

A Project Manager begins working with the client at discovery and provides ongoing customer support to the client. Implementations involve close collaborations and typically range from six to twelve weeks.



INTEGRATIONS

The Springboard system is easily integrated with many other systems and models. For CRMs, Springboard natively integrates with Salesforce (NPSP, NGOC, Luminate Online, and custom) and Microsoft Dynamics CRM.



UPDATES

Springboard upgrades are fully managed by the Jackson River client services team. New releases including new features, enhancements, and ongoing security and maintenance upgrades happen every four to six weeks.



ONGOING SUPPORT

Springboard's implementation team provides training and support. Clients sign up for different monthly support retainers based on their needs.

QUESTIONS TO ASK:



What features of your current tools do you not want to lose?

What connectivity would help everyone feel more effective?

When is the best time to start this project?

Who on your staff can be the internal leader for the tool migration?

Will this tool help you reach more people?

Will this tool get you closer to your goals?

Do you have staff and board support?

How We Can Help

Making the decision to change the tools you use at your organization is a big one. Now that you know more about the landscape of digital marketing platforms, our **tried-and-true method of evaluation and selection** can help your nonprofit pick the right tools for the job.

Research the Options

To know where you're going, you need to audit every tool you currently use and how (or if) they work together. This is the time to talk to your team to learn who uses which tools and the highs and lows of each. **Our project managers can guide your team through an audit and track all the information.**

Demo the Tools

Demonstrations allow you to test tools and see how each would fit with your organization's goals and processes. Think about challenges from your daily work and ask how each tool can solve them. Explore integrations that can help create a unified digital ecosystem. **We work with many of these tools and can help craft test scenarios and demos.**

Decipher the Results

We suggest grouping your needs into 'must haves,' 'nice to haves,' and 'not important' categories for everyone involved. Then make a pros and cons list for each tool to get a fair comparison. **We organize and decipher results to help you make decisions with confidence.**

Manage the Process

Once you've chosen the right tool or tools, there are still steps to take before you can start using them. That's where our team of nonprofit technology experts comes in. **We can help with migration and design, and build all the assets you need. Then we can work with you to optimize your tools using digital marketing best practices.**

Thank You!

To all the nonprofit professionals working hard to make a just and equitable world, thanks for all you do and for inspiring us. And a huge thank you to our amazing partners in the wide world of nonprofit digital marketing. The teams at all 13 tools we profiled gave their time and insights and each provider supplied resources and information to us as we dug into their tools and learned more about their capabilities.

LET'S TALK >

FIREFLY PARTNER SERVICES:

- Digital Strategy + Support
- Website Design + Development
- Email + Fundraising Campaigns
- Tool Selection + Upkeep
- Analytics + Optimization

303.325.5934 | info@fireflypartners.com