



Improving email stewardship
journeys with tailored automation

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A Wood for Trees case study

Key benefits

- Fully automated, tailored and streamlined email stewardship process, using Apteco marketing software
- Personalised and relevant, dynamic and high-quality email content
- Projected year one uplift of £200-£300k fundraised income and ROI
- Time and resource saving – two full days of an employee's time per week
- Enhanced supporter experience and engagement



Overview

Teenage Cancer Trust supports young people aged 13-24 through cancer. The email stewardship process for 'own place' fundraising event participants consisted of manually downloading lists from a CRM database and creating mail merges in Outlook, which was time-consuming and restrictive.

Individuals received three consecutive emails - 'Welcome' within a week of registering, 'Good luck' the Friday before an event and 'Well done' within two weeks after an event. Personalisation was inconsistent and the emails weren't always timely, with the task solely carried out by one employee. The content was generic and didn't consider the different needs of different supporters.

The goal was for each participant to receive up to nine emails, all dependant on the length of time between the date of registration and an event, with each email to include personalisation and dynamic content.

Apteco marketing software was used to build the new, automated email stewardship journey. Flags in Apteco PeopleStage added personalisation and triggered relevant information to be included. Complex expressions group the various calculations of email content and ensure emails are sent when they should be, making selections in Apteco FastStats straightforward.

Overview cont'd...

Further enhancements warranted building a control pool to ensure streamlined, deduplicated communications and a visual, interactive reporting dashboard in Apteco Orbit allows for tracking fundraised income, stewardship journeys and email engagement.

Without the previous manual process, two full days of an employee's time a week have been saved and the new, automated email journeys would be the equivalent of a full-time job.

With a more supporter-centric approach, event participants now receive more tailored, bespoke and higher-quality emails, which will likely increase email engagement and ROI, with a year one projection of a £200-£300k uplift in 'own place' income.



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Challenge

While Teenage Cancer Trust has many places in fundraising events, hundreds of supporters choose to take on their own challenge – buying their own place and opting to fundraise for the charity. The email stewardship process for these individuals consisted of manually downloading lists of participants from a CRM database and creating mail merges in Outlook, which was time-consuming and restricted the ability to tailor messaging or provide robust and consistent support, plus the impact on team resource was significant.

Historically on registering, these 'own place' participants received three consecutive emails:

1. 'Welcome' email within a week of registering for an event
2. 'Good luck' email the Friday before the event
3. 'Well done' email within two weeks following the event

The emails didn't include consistent personalisation and weren't always time-sensitive, and the task was solely carried out by one employee. The content was also generic and couldn't take into account the different needs of different supporters, for instance, those who might need support with training or those struggling to fundraise.

Solution

The goal was for each participant to receive up to nine emails, all dependant on the length of time between the date of registration and the event.

1. 'Welcome' email upon registering for an event
2. Three or four subsequent 'check-in' emails leading up to the event
3. 'Good luck' email the day before the event
4. 'Congratulations' email the day after the event
5. 'Thank you' email two weeks after the event
6. 'Onwards' email one month after the event

An additional aim was for each email to include some level of personalisation or dynamic content to relate to, for example, the supporter's name, event name, whether the supporter had set up a fundraising page and whether they'd ordered clothing specifically for an event.

This new, automated email stewardship journey was created using Apteco marketing software. Flags were set up in Apteco PeopleStage to add personalisation to each email and trigger relevant information to be included. Expressions were created to group all the calculations required to put together all variations of email content and ensure emails fire off when required. This made the selections in Apteco FastStats straightforward to drive the automated Apteco PeopleStage journey.





Solution cont'd...

The benefits of the Apteco Orchestrator Bundle added the functionality to process the data at event booking level as opposed to supporter level, allowing communications with supporters who register for multiple events at different times.

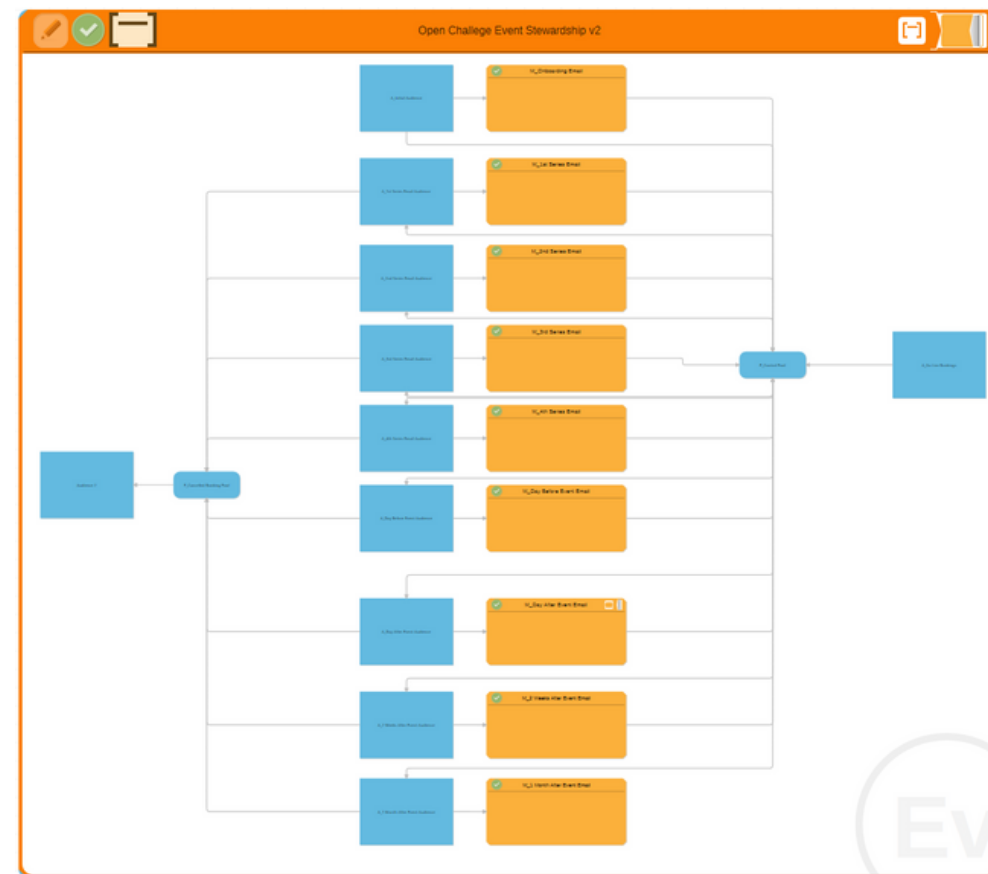
Further project work enhanced the calculations and expressions to include more dynamic dates and split event types, allowing participants to have different email journeys depending on what events they register for (see the full email schedule on the following page, along with an example expression).

A control pool was built within Apteco PeopleStage to ensure event bookings are picked on the date emails require sending, where they're then placed back awaiting the next communication trigger (see the Apteco PeopleStage journey, including the control pool, on the following page). This also allows for existing event registrations to be accounted for in the inclusion criteria, as well as new ones, plus it avoids duplication of communications.

Finally, a visual, interactive and accessible reporting dashboard was created using Apteco Orbit. This allows the team to see how many event registrations are going through the journey, how much income is being fundraised and the level of email engagement.

Solution cont'd...

	Welcome Email	Series Email 1 / Fundraising	Series Email 2 / Training	Series Email 3 / Cause Led	Series Email 4 / Countdown	Day Before Event / Good Luck	Day After Event / Well Done	2 weeks after event / Thank you & Reminder	2 months after event / Onwards
All Open exc Other									
>= 4 months	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
6 weeks - 4 months	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
<= 6 weeks	Yes	Yes	-	Yes	Yes	Yes	Yes	Yes	Yes
<= 4 weeks	Yes	Yes	-	Yes	-	Yes	Yes	Yes	Yes
<= 2 weeks	Yes	Yes	-	-	-	Yes	Yes	Yes	Yes
<= 1 week	Yes	-	-	-	-	Yes	Yes	Yes	Yes
<= 2 days	-	-	-	-	-	Yes	Yes	Yes	Yes
Open Other									
>= 4 months	Yes	Yes	-	Yes	Yes	Yes	Yes	Yes	Yes
6 weeks - 4 months	Yes	Yes	-	Yes	Yes	Yes	Yes	Yes	Yes
<= 6 weeks	Yes	Yes	-	Yes	Yes	Yes	Yes	Yes	Yes
<= 4 weeks	Yes	Yes	-	Yes	-	Yes	Yes	Yes	Yes
<= 2 weeks	Yes	Yes	-	-	-	Yes	Yes	Yes	Yes
<= 1 week	Yes	-	-	-	-	Yes	Yes	Yes	Yes
<= 2 days	-	-	-	-	-	Yes	Yes	Yes	Yes



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```
DescOf([EB_Challenges Other])="No",

/*More than 4 months*/
If(DateDiff([EB_Booking Date],[Challenge Event Date],"months")>=4,DateShift([Challenge Event Date],-4,"months"),

/*6 weeks to 4 months*/
If(DateDiff([EB_Booking Date],[Challenge Event Date],"weeks")>6,DateShift([EB_Booking Date],RoundDown(DateDiff([EB_Booking Date],DateShift([Challenge Event Date],-7,"days"),"days") / 4,1),"days"),

/*Less than or equal to 6 weeks*/
If(DateDiff([EB_Booking Date],[Challenge Event Date],"weeks")>4,DateShift([EB_Booking Date],RoundDown(DateDiff([EB_Booking Date],DateShift([Challenge Event Date],-7,"days"),"days") / 3,1),"days"),

/*Less than or equal to 4 weeks*/
If(DateDiff([EB_Booking Date],[Challenge Event Date],"weeks")>2,DateShift([EB_Booking Date],RoundDown(DateDiff([EB_Booking Date],DateShift([Challenge Event Date],-7,"days"),"days") / 2,1),"days"),

/*Less than or equal to 2 weeks*/
If(DateDiff([EB_Booking Date],[Challenge Event Date],"weeks")>=1,DateShift([EB_Booking Date],RoundDown(DateDiff([EB_Booking Date],DateShift([Challenge Event Date],-7,"days"),"days"),1),"days"),
MakeDate(1800,01,01)
```

Results

This evolving project and ultimate implemented solution using Apteco marketing software has changed operations in the mass participation and data teams at Teenage Cancer Trust for the better.

The previous manual process took two full days of an employee's time a week during event high-season. Furthermore, to manually implement the quantity and quality of emails included in the new journeys would be the equivalent of a full-time job.

Teenage Cancer Trust now has a fully automated and streamlined email stewardship process, accessible to numerous users. From this, employees have been, and will continue to be, upskilled and unified in data solutions and analysis.

Supporters now receive more personalised and relevant, bespoke and higher-quality email content, more often, with the aim being to increase email engagement and engagement with the charity as a whole. In turn, this will ultimately grow fundraised income and ROI, with year one projected at a £200-£300k uplift in 'own place' income.





Results cont'd...

In addition, it's anticipated that with prompts now being included in emails, more fundraising event pages will be created. Not only is this likely to increase fundraised revenue but it'll also improve the way in which funds are processed.

Bigger picture, the charity now has more time, resource and functionality to focus on building and implementing wider strategies. With solutions and systems in place to track analytics, benchmarks can be established over time and, from this, longer-term strategic KPIs and objectives created and monitored to the overall benefit of the charity and its supporters.

Ultimately, this builds a supporter-centric approach to the charity's stewardship to create brilliant experiences for its fundraisers, personalising their journeys and tailoring to their needs, which should build brand awareness and increase supporter retention and engagement in the long-term.

Get in touch

Email

getinfo@woodfortrees.net

Call

+44 (0)1225 636 017

Visit

woodfortrees.net



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