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# Creating Constituent Journeys

Engage constituents with personalized, connected journeys

**In the nonprofit world, your constituents are your customers, and your interactions with them build personalized relationships over time.**

Nonprofit marketers' #1 priority is engaging constituents in real time<sup>1</sup>.

## Why are constituent journeys important?

As the world of constituent engagement becomes increasingly digital, there are more touchpoints than ever before. With so many different ways to engage constituents, many experiences end up disconnected. That's why digital engagement through organized and intentional constituent journeys is so important.

An individual's story with you should go beyond just clicking an ad, signing up for an email list, or attending a single virtual event. By connecting channels of engagement – such as encouraging social media followers to sign up for a newsletter – you can create multi-channel journeys that seamlessly build and nurture 1:1 personalized relationships with constituents at scale.

Mapping constituent journeys gives you deeper insight into what brings constituents to your organization, and what makes them passionate about supporting your organization and your mission.

The more you understand how constituents want to engage with your organization, the more you can personalize and streamline journeys.



## How can nonprofits map constituent journeys?

Journeys can take on any format that fits your organization, but most will follow this model:



A good constituent journey is one that meets the requirements of your organization. Think about what makes your most passionate supporters excited about your mission and goals. Fundamentally, every constituent journey should tap into these feelings.

Questions like these can help nonprofits identify the most important goals for their journeys:

- Who are our constituents now, and how do we find others like them to engage?
- How do our constituents learn about us and about ways to give and get involved with our organization?
- How do we engage with our constituents, and how do they currently engage or want to engage with us?
- What does the beginning, middle, and end of constituent engagement look like?

## Marketing moments — by constituent types

Constituents fall into many categories and often overlap, but the most common categories are net new, donors, volunteers, and members. Different organizations will have different types of constituents, but each type has unique key moments where you have the opportunity to cultivate longer-term engagement.

### Prospective Constituents

First Touch	Second Touch	Third Touch	Fourth Touch
<p>These constituents will have clicked on an ad, joined your Facebook group, or heard about you from friends or family.</p>	<p>Now that they've found you, they need to get to know you. Make sure they visit your website to learn more about your mission, programs, organization, and goals.</p>	<p>Once they've learned a little about your mission, you need to find out more about them. Make sure to include a CTA on your website that will collect their email address and some personal information – such as a newsletter sign up, program registration, donation form, or event or activity registration.</p>	<p>Success! You have their email address. Now they're known to you and you can further personalize their journey.</p>

## Donors

First Touch	Second Touch	Third Touch	Fourth Touch
Maybe this is the first time they've donated, or maybe it's the hundredth. Send them a thank-you email with links to additional ways to support you.	Send them impact information so that they can see where their donation went and invite them to a virtual fundraising event.	Excellent! They've donated a second time – or better yet, they've signed up to make a recurring donation! Keep them engaged. Send them more information about how their gift is helping, and encourage them to consider additional ways to get involved.	Check in and encourage them to get their friends and family to donate and get involved as well.

## Volunteers

First Touch	Second Touch	Third Touch	Fourth Touch
A volunteer signed up! Send them an email explaining why you need their participation. Let them know what you'll be able to accomplish thanks to the power of your volunteers.	They've just completed their first volunteer project. Thank them and send them similar opportunities to help out. Did they enjoy the activity? If they did, provide a link to similar ones that they may be interested in. If they didn't, let them explain why. Make sure they know their feedback will help you grow and improve.	They've completed a second volunteer project. Great! Encourage them to share your organization with friends and family, and highlight how to have groups sign up.	Check in on holidays, their birthday, and send them special opportunities to keep them interested. Send impact data and provide links to groups, chats, and forums where your community of volunteers tends to meet to encourage them to participate there also.

## Members

First Touch	Second Touch	Third Touch	Fourth Touch
Orient your new member by walking them through the perks of membership, and using this as an opportunity to learn more about them.	Keep them interested by introducing them to other members. Send links to groups, your community, or events where they can meet others who support you.	Encourage them to attend an upcoming event or activity. Highlight members with similar characteristics who are passionate advocates for your organization.	Check in to make sure they're happy with their membership and ask for feedback. Identify and note whether they are likely to renew their membership. If not, send special, personalized opportunities to take advantage of their membership.

# What does a constituent journey look like?

Here's an example of what a nonprofit constituent journey could look like:



Jessica is interested in animal welfare and clicks on an ad for her local animal rights organization.



The ad takes her to the organization's website where she's able to register for a newsletter. She is able to specify that she's interested in local news when she registers.



Over the next few weeks, Jessica receives articles about animal rights activists and events in her area which really resonate. Jessica decides to donate.



The organization can see that Jessica has clicked on a lot of local stories about dogs, so once she donates, she receives an email from the organization thanking her and recommending another opportunity to volunteer to walk puppies in her area.



Two days before the event, it's expected to rain. The organization sends out an email reminding the volunteers of the impact they'll have by attending the event.



Jessica loves puppies, and thinks she might enjoy volunteering as well, so she registers for the volunteer event.



After the event, Jessica receives a thank you package welcoming her as a volunteer and advocate for her area.

Jessica is thrilled, the organization has sent her a t-shirt, and a special link to a local volunteers group where she can chat with other supporters. She receives a personalized impact statement every time she volunteers, and is encouraged to share her advocacy with friends and family. The organization also offers her a membership as a long-term repeat volunteer and donor.



## How can nonprofits overcome constituent journey challenges?

For many nonprofits, the increasing need for digital-first and digital-only engagement means reimagining constituent journeys across multiple digital channels.

Nonprofits often face significant hurdles in developing cross-channel constituent journeys. Only 27% of nonprofit marketers describe their cross-channel coordination as “dynamic,” while 54% describe it as “duplicated” and 19% say it’s “siloed.”<sup>2</sup>

### Most Common Cross-Channel Constituent Journey Challenges

#### Delivering better experiences

Experience is the key differentiator in the for-profit space, and it’s increasingly important in the nonprofit space as well. Constituents provide more consistent, long-term support to organizations that deliver better experiences. Mapping customer journeys can help nonprofits identify experiences that hit the mark with the most constituents.

#### Personalizing journeys with data

Constituents want the same type of personalized engagement from nonprofits that they receive from the for-profit services they use. Data is the key to delivering the customized, curated experiences these individuals want—across all their preferred channels.

#### Connecting constituent journeys

New generations of constituents don’t just want email updates from nonprofits – they want engagement across all their preferred channels, tailored to their interests. To engage these audiences now and in the future, nonprofits need to get their datasets and cross-channel personalization tools ready.



## Here's a constituent journey map worksheet.

Enter your answers digitally or print multiple copies to make plans for different types of constituents. Refine your strategies as needed.

### Assessing Your Current Constituent Journey

List your current touchpoints related to each category.

Awareness	Onboard	Engage	Retain

### Journey Goals

What do you want your constituents to do by the time they reach the end?

## Channels and Message

What channels does your organization use to connect with constituents right now?

What message does your organization currently use to speak to constituents?

Where do you most want to distribute content?

If you could create any kind of content, what would it be?



# Mapping Your Ideal Constituent Journey

Use this sheet to begin building out your ideal constituent journey based on your ideal content and channels. Print this out and hang it in your office! Work with your teams to continue building your perfect journey!

**List the ideal message, content, constituent type, and ideal channel for each stage of your journey.**

Awareness	Onboard	Engage	Retain

**Identify areas where touch points connect. What are the next steps constituents will need to take?**

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## Refining Your Journey

**What goals have shifted? Identify any hurdles or gaps that will need to be addressed.**

### Ready to start building? Need some help to get there?

Contact your Salesforce.org account executive to learn more.

