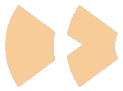# CASE STUDY
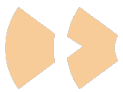# UNITED WAY

Nonprofit organization, United Way, needed a better way to educate, interact with, and care for their online donors. A partnership between sales and marketing solution provider, Lead Liaison, and full-service donation platform, iDonate, made United Way's vision a reality.

INTRODUCTION

Marketing automation can help nonprofits streamline their donor engagement strategy. It allows nonprofits to segment the donor base, allowing them to speak more relevantly to each donor, based on which category they fall into. In addition to that, nonprofits can customize content based on a donor's stage and level of engagement.

PROBLEM

United Way is a nonprofit organization that combines the efforts of offices across the US to fundraise and provide support. Their mission is to improve lives across our diverse communities by prioritizing needs in education, income and health; forming innovative and effective partnerships with other organizations; and strategically raising and investing resources to make lasting change.

United Way needed a better way to educate, interact with, and care for their online donors. They employed the help of Lead Liaison's Lead Management Automation (LMA)™, as well as iDonate's donation platform, to build a process for potential donors who visit their website and complete (or start) their web form. They call this lead flow their **Donor Engagement Plan**.

United Way's biggest hurdle was using iDonate's donation forms in conjunction with Lead Liaison's automation. Because the iDonate forms were not natively built within Lead Liaison, the level of tracking and automation that Lead Liaison could offer around form submissions was reduced. United Way needed to find a way to associate a donation with a visitor's activity profile inside of Lead Liaison and retarget people who visited donation pages but didn't donate using omni-channel marketing.

SOLUTION:
Partner with iDonate to Create an Integration

iDonate forms were integrated to work with Lead Liaison's Custom Activities. The Custom Activity defines the iDonate form name, description, donation amount, and form ID. The iDonate form is then created as a Lead Liaison form object, and all fields in the iDonate form are mapped to Lead Liaison Prospect fields to ensure data flows from iDonate into Lead Liaison.

To associate a donation with a visitor's activity and profile, Lead Liaison has a Prospect ID that's passed through the iDonate form. Once passed to iDonate, iDonate sends the Prospect ID back to Lead Liaison, as a JSON formatted webhook, so that Lead Liaison can associate the donation with the visitor (via the Prospect ID). Once all forms have been integrated, JavaScript snippets are added to Lead Liaison's existing tracking code to identify which web pages contain iDonate forms. This is the same tracking code that tracks donor interests, including page visits, document downloads, tracking URL clicks, social post engagement, email engagement, video engagement, and more. With this enhanced tracking code, donations become another activity in the overall engagement profile of a donor. Profiles continue to evolve through the donor lifecycle.

But wait, there's more! United Way is now also able to retarget people who visit, but do not donate. The process is designed so that if someone visits a donation page and doesn't donate within one (1) hour, an email is sent asking them to reconsider. If they do donate, or if they received an email through Lead Liaison in the last 3 days, that email will not be sent.

To do that, United Way added a new true/false prospect field (called "Remarketing Flag"). If a user visits their donation page and that field is not flagged as "True", then Lead Liaison will wait an hour and then send their email. If someone makes a donation, then the flag is turned on and the system won't send the email. If the email is sent, then the field is flagged as true for three (3) days so they aren't spammed asking to donate over and over. After three (3) days, the flag is turned off, so if they visit the page it starts all over again.

The flows look something like this:

Didn't Donate: wait 1 hour > check field > field is not true > send re-targeting email > change field to true > wait three (3) days > change field to false

Did Donate: change field to "True" (via fulfillment action from form submission) > wait 1 hour > check field > field is true > skip email > wait three (3) days > change field to false.

In both cases Lead Liaison changes the field to false after three (3) days so United Way can re-target them again later if they visit without donating.

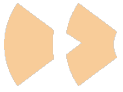## United Way/iDonate Architecture
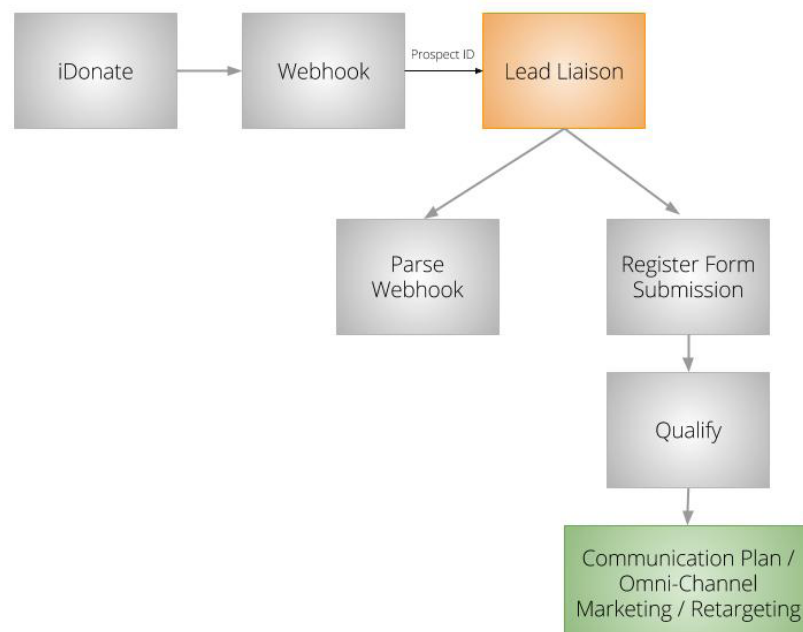
Eager to learn more?
Contact us for more information today!

✉ info@leadliaison.com   ☎ (888) 895-3237

RESULTS

United Way can use the information collected to do more omni-channel marketing initiated from a donation. Lead Liaison and iDonate help United Way make sure there is no lead left behind. As a result, United Way is up 57% in donations for this time period (April 15, 2017 - September 13, 2017) versus the same dates last year (April 15, 2016 - September 13, 2016).