

THE ULTIMATE TEXT MESSAGING CHECKLIST FOR NONPROFITS™

HOW TO ROLLOUT SMS/MMS TO INCREASE DONOR ENGAGEMENT.



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Notes



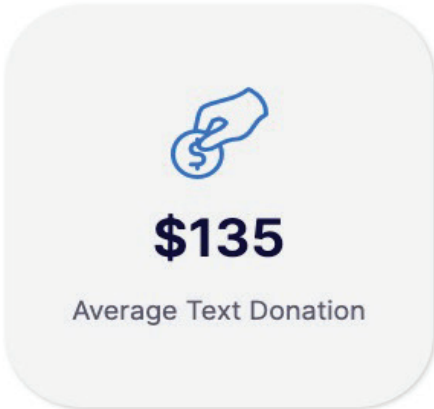
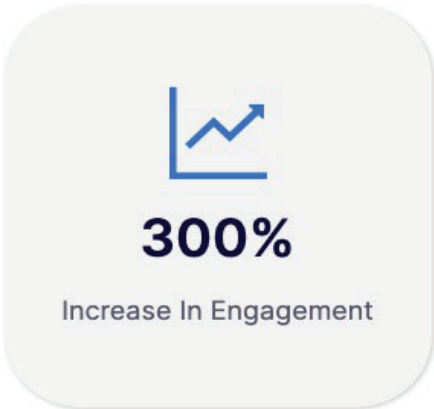
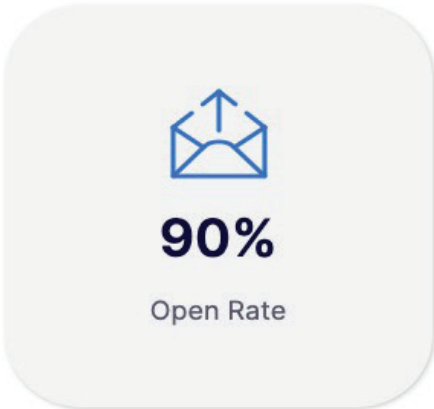
ABOUT THIS CHECKLIST

Most nonprofits struggle to capture and keep people's attention, so we created The Rally Platform to help forge unbreakable relationships with donors and volunteers. When you can Rally support, great things will happen!

Your mission is too important to ignore

People see on average 5,000 ads a day and have 200+ emails in their inbox -- most of which they ignore. With the rising cost of donor acquisition, you want to make it simple to connect and keep existing contacts engaged.

With Rally Text-2-Donate™ and Conversational Text Messaging™ built exclusively for causes and charities, **your message will get through.**



We put this checklist together as a free resource to help you evaluate and implement text messaging — regardless of which platform you use. We hope you find it helpful, and we welcome your feedback on how we can make it even better.



OUR GOALS FOR TEXTING DONORS

We've listed some common goals. Add your own and then rank them in order of priority.

Goal	Priority	What Does Success Look Like?
Capture New Donors		
Engage Existing Donors		
Increase Recurring Donations		
Move Supporters to Other Channels		
Improve Virtual Event Engagement		
Implement a Thank You Program		



4 TYPES OF TEXT MESSAGES

Be clear on what you are looking to accomplish and how.

Some examples include:

1. Transactional

Example: Thanks for registering for our Save Our Streets event. Here is the information we promised [{{link}}](#). We'll see you there!

2. Solicitation/Marketing

Example: Donate today! Click [{{link}}](#) to help us raise \$100,000 to save the Chubby Unicorns. They'd thank you if they could! | Reply STOP to Unsubscribe

3. Informational

Example: Our Keep SD Sunny Walk is just two days away! We've updated our route and parking suggestions here [{{link}}](#). See you there!

4. Conversational

Example: Hi [{{first_name}}](#), This is Jane with ACME Foundation. Thank you for your recent gift. Do you have a minute to jump on a call? I'd love to chat with you.

Then decide if you want to send these from your personal/work phone or use a platform like RallyCorp.com to automate and personalize messages, manage compliance, and share an inbox with your team.



6 STEPS TO SETUP TEXT TO DONATE

Build opt-in lists and reduce the friction to give.

1. Choose a provider that offers either a shortcode (a number like 24-365) to keep it simple or a regular toll-free or local area code number that can support telephone calls.
2. Select a keyword or two that matches your brand or campaign. Use more than one for different workflows and to segment campaigns.
3. Configure QR codes and short links to activate numbers and keywords.
4. Connect existing CRMs and fundraising pages or set up a new merchant processor.
5. Test on various devices, iPhone, Android, macOS, and iPad, for example. Try to use a couple of different carriers, like AT&T, Verizon, T-Mobile, etc.
6. Share your keyword on social media, during live events, etc. Then use a tool like Canva to add your shortcode or QR code to images before posting them.



7 WAYS TO SUPERCHARGE NONPROFIT DONOR ENGAGEMENT

Follow these strategies to grow your lists and drive results.

1. Align with Your Values and Why
2. Know Your Audience
3. Stay Human
4. Reduce the Friction to Act & Give
5. Be Grateful & Encourage Conversation
6. Define and Measure Success
7. A/B Test - Wash, Rinse, & Repeat

Take a deep dive into each of these areas in the 7 Strategies to Use Text Messaging to Supercharge Nonprofit Donor Engagement webinar [here](#).



THE ULTIMATE NONPROFIT TEXTING CHECKLIST

	Completed	Comments	Next Step(s)
Align with Values & Why/Mission	<input type="checkbox"/>		
Define Goal(s)	<input type="checkbox"/>		
Success is Measurable	<input type="checkbox"/>		
Select Number or Shortcode	<input type="checkbox"/>		
Decide MMS or SMS or Both	<input type="checkbox"/>		
Update Forms to Capture Consent	<input type="checkbox"/>		
Choose Platform Partner	<input type="checkbox"/>		
Integrate CRM/Platforms	<input type="checkbox"/>		
Mobile Friendly Pages	<input type="checkbox"/>		
Create UTM Parameters	<input type="checkbox"/>		
Setup Link Tracking	<input type="checkbox"/>		
Generate QR Code	<input type="checkbox"/>		
Create Graphics (e.g. Canva)	<input type="checkbox"/>		
Setup Inbound Workflows	<input type="checkbox"/>		
Segment Audience	<input type="checkbox"/>		
Upload Existing Opt-in Contacts	<input type="checkbox"/>		
Validate Contact Phone Numbers	<input type="checkbox"/>		
Import Global Unsubscribe Lists	<input type="checkbox"/>		
Write Personal Messages/Scripts	<input type="checkbox"/>		
Send A/B Tests & Monitor Replies	<input type="checkbox"/>		



Notes



ADDITIONAL RESOURCES

<p>[Course] How to Use Text Messaging to Engage & Retain Donors</p>	<p>Staying in touch with past donors is a real challenge. This course will share how to use conversational text messaging to forge a robust and authentic relationship with your donors. The result will be supporters who feel connected and give more. Signup free at rallycorp.com</p>
<p>[Webinar] 5 Things to Consider Before Texting Donors</p>	<p>Join us as we share five things you should consider before you text donors — especially for the first time. We discuss techniques for building a vibrant opt-in list, crafting the ideal message, working with existing donor workflows, and staying compliant (avoiding steep penalties and fines). Watch now at rallycorp.com/webinars</p>
<p>#TextGen Free Training and Nonprofit Leader Facebook Group</p>	<p>We will provide free training and resources using technology to acquire, engage, and retain donors from time to time. You will also get an invite to a private Facebook Group of Nonprofit Leaders. Signup at rallycorp.com/TextGen</p>



HELPFUL TEXTING DEFINITIONS

Ai-Enhanced, Natural Language Processing, or Sentiment Analysis - The ability to interpret and score the meaning in text and respond with specific instructions based on a message received, not just a particular word. Rally is a pioneer in this space, so most systems will only support rudimentary commands like STOP or HELP.

Campaigns - A message or sequence of text messages sent at a particular day/time, one-to-one (peer-to-peer), or in bulk to a group of people. These messages can include embedded contact/custom data, emojis and are generally 160 to 300 characters in length, depending on your texting platform.

Keyword/Key Phrase - A combination of three characters or more, including a phrase or an emoji sent to a number to kick off a workflow. They are usually not casesensitive.

MMS - Multimedia Messaging Service is a standard way to send messages that include multimedia content like pictures and videos.

Prompt - A configurable auto-response/reply sent from an SMS Platform. These are generally used to capture a response to a question, trigger a follow-up message, or record consent.

Reserved Keywords - Most systems respond to specific words automatically; for example, HELP will return TCPA compliant instructions for how a person might unsubscribe from a list, and STOP will prevent further messaging to that phone number. Again, which commands and how “intelligent” they are will depend on your texting platform.

Short Code - A short telephone number such as 24365 (Rally’s number) approved by US mobile network carriers to reliably deliver messages. Short numbers are a convenient and straightforward way to capture consent and trigger workflows, like Text-2-Donate, with little effort.

SMS - Short Message Service. Invented in the 1980s, it’s a text message service component of most Internet and mobile devices.

TCPA - The Telephone Consumer Protection Act of 1991 regulates telemarketing, auto-dialing, text messaging, & unsolicited faxes.

Workflow - An event-based trigger or sequence that takes a contact down a specific path. Workflows can be kicked off via QR Codes, texting a toll-free/local phone number, or sending a keyword to a shortcode, depending on your platform.



THE NEXT STEP

Need help implementing text messaging to increase donor engagement?

**Have a specific fundraising campaign or event in mind?
We've got you covered:**

- Get answers to your questions.
- We'll show you how our platform features will accomplish your specific goals.
- Together, we'll craft a plan you can take back to your team or board for discussion and approval.

Pick a date on the calendar or [contact us](#) for more options.



**<https://rilly.cc/consult>
or Send **RALLY** to **24-365** and
select option #2**





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