



The complete guide to lead gen for charities



What are lead generation campaigns?

Lead generation campaigns are digital campaigns that ask people for their phone number or email address, and follow up with a fundraising ask (like asking for a cash or regular gift) by email or phone.

They're a great way to attract more donors from cold audiences to your charity.

Different lead gen models

There are a bunch of different ways to do lead gen.

The most common is running lead campaigns on Meta Ads (which [Platypus Digital](#) can do for you) and converting them by phone (which [Stratcom UK](#) can do for you).

You can get the phone numbers through:

Value exchange

Offering a free gift in return for the person's phone number



Petition / handraiser

Asking the person to complete a petition or an "I believe" statement and calling them if they include their phone number.

Events

like above but in person at events like festivals instead of online.



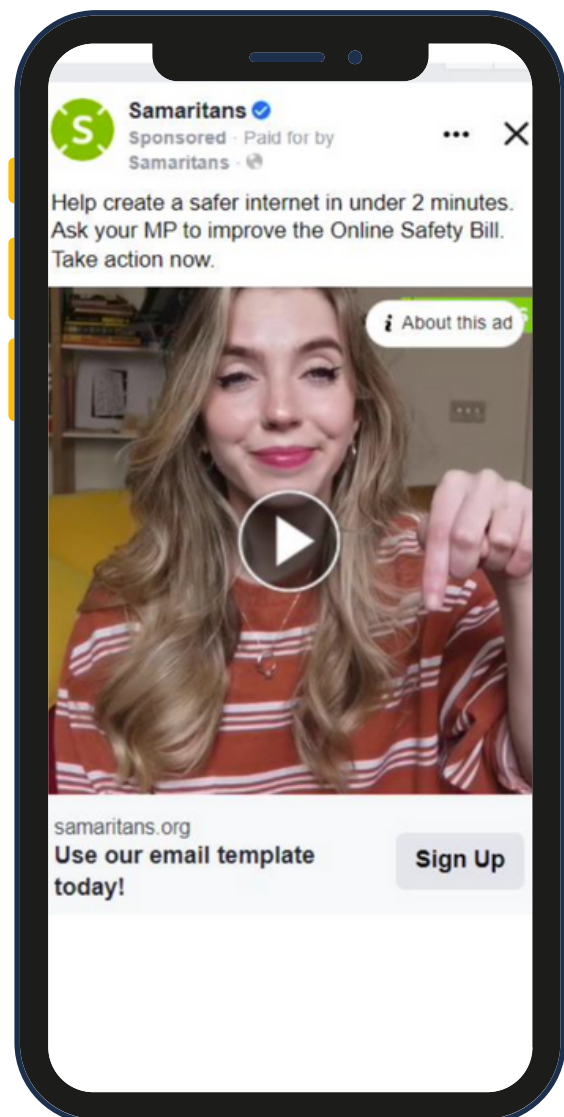
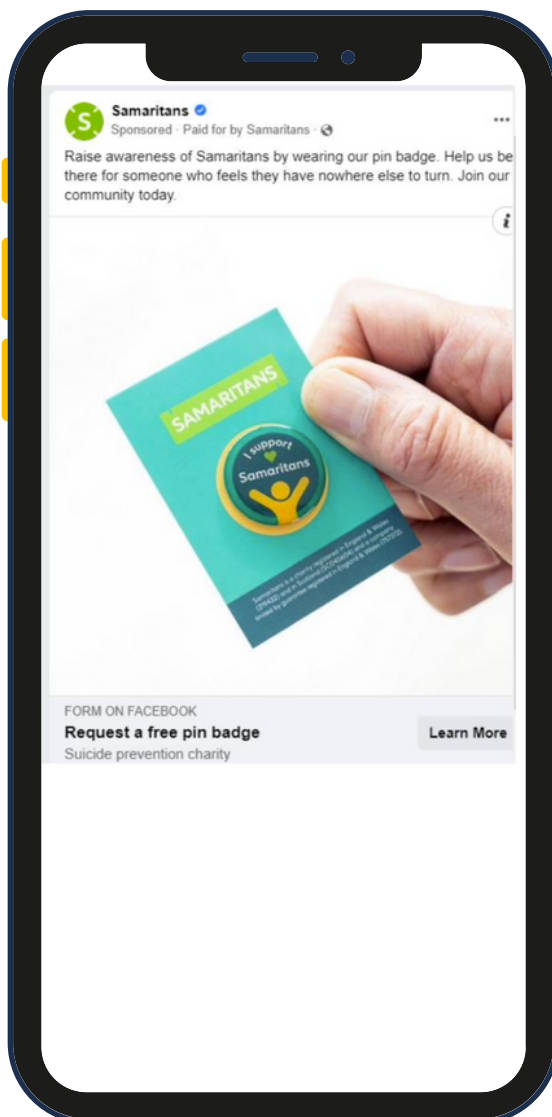
In each of the following examples, the person fills in their details on the form, and your charity or telemarketing agency calls to ask them for a single or regular donation

Value exchange

This is where you offer the person something of value to you in exchange for their contact details.

It's usually a free gift like a tote bag or a badge.

The person fills in their details on the form, Stratcom UK phone them to get the address to send their details, and ask them for a single or regular donation.



Petition

This works best for activism/advocacy asks.

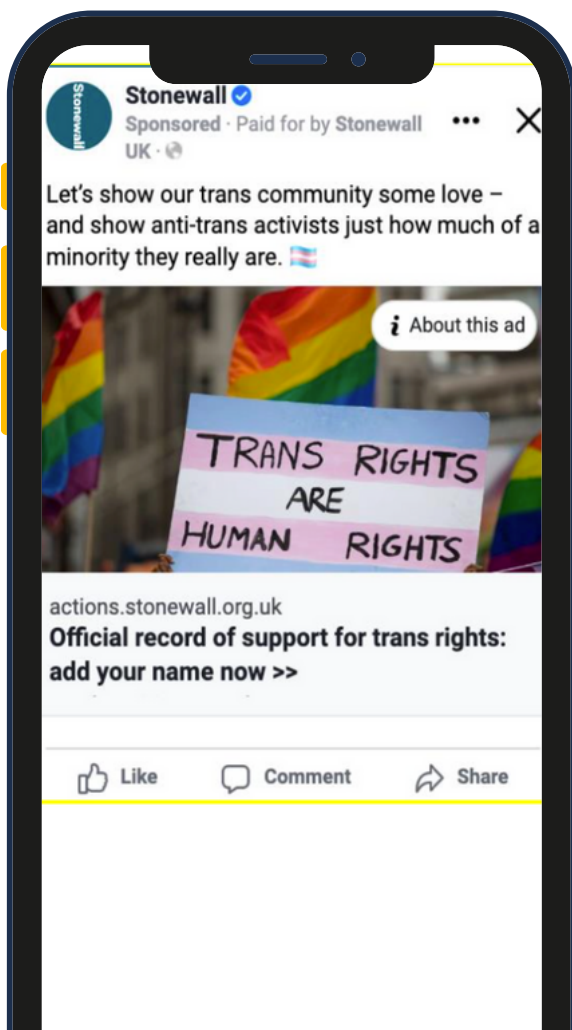
You call on a target (political, corporate etc) to take a specific action. The call to action can be critical or even supportive of the target.

The person fills in their details on the form, and you contact them by phone or email with a fundraising ask later.

Survey, questionnaire or quiz

These are “Test your knowledge of/experience with XYZ” style questions.

The tone can be super serious or fun and comical.



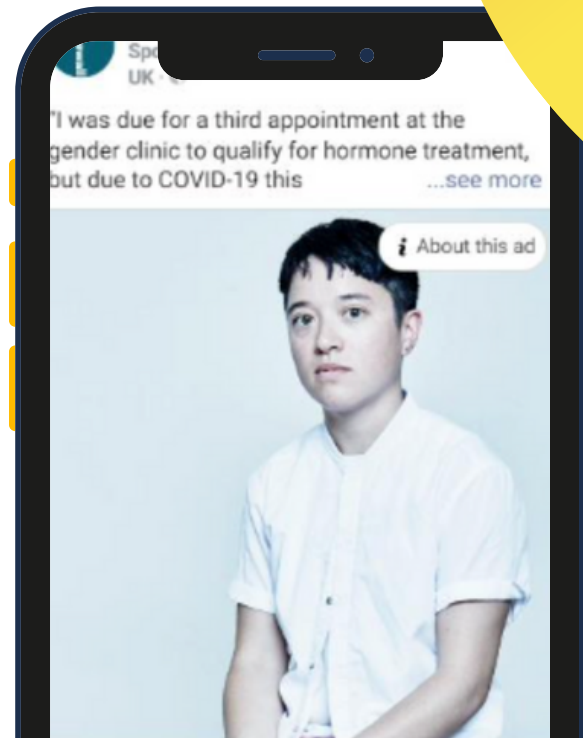
You can do this in lots of ways:

- **Quiz:** Challenge yourself/your friends, find out how much you know
- **Survey:** Ask for people's attitudes towards a topic to improve your service
- **Poll** - Answer a single question on a resonant issue

Handraiser

Here you ask the person to state their support for a certain value statement.

This is usually an “I believe” statement that gets people who believe the same as your charity to (virtually) raise their hand.



Behavioural pledge

This is where you ask the person to commit to adhere to a particular behaviour.

You make it clear you're part of the solution. That helps keep your cost per lead (and therefore cost per acquisition) down.



Send a message

This allows people to send a message of support or gratitude to a beneficiary or 'hero' figure, like a fieldworker working for your organisation.



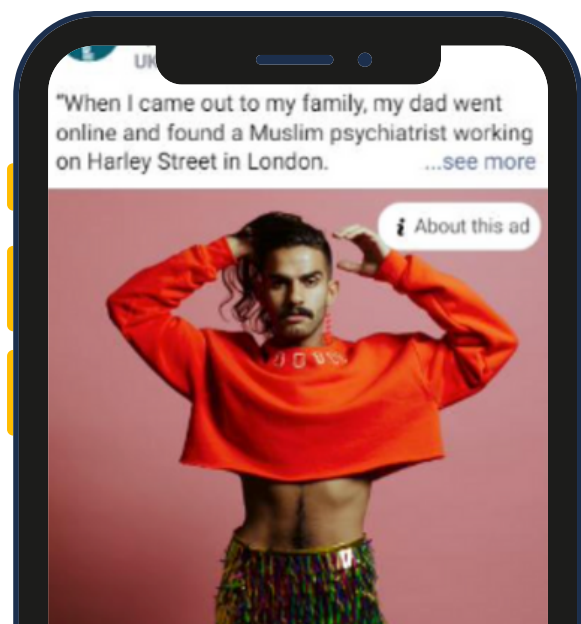
Game

Get the person to play a compelling game that builds your engagement with cause

Share something

Here you encourage the person to share a story, photo or a design related to your charity:

You can run this as a competition.





Top tips for lead gen campaigns



Get insights from your agencies

They can help identify trends and opportunities in the audiences you target, the content you use and the long-term return from the donors you find.

Implementing the action from these insights will definitely boost the long-term impact of your campaigns.



Check your organisation's GDPR policy

Check that your campaign matches your organisation's approach to GDPR (which varies from charity to charity).

Is your privacy policy clear on what you'll do with the people's data? Can you show active rather than passive consent if your forms autofill?



Top tips for lead gen campaigns



Look at different landing page platforms

Facebook's lead gen form will give you the highest number of leads at the lowest cost per lead. There are also other platforms available for different website CMSs and charity platforms.

You can use these to collect lead gen data and integrate it with other platforms.



Keep an eye on Christmas costs

There are so many charities advertising at Christmas, so costs of advertising can increase a lot then.

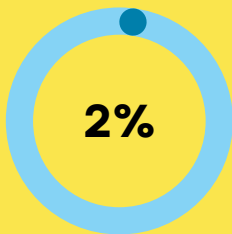
Some charities pause their long term campaigns over Christmas.



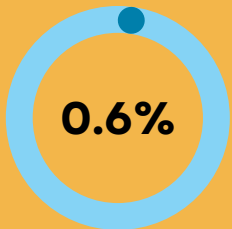
Email lead generation

This is where you ask for the person's email address instead of phone number, and send them a series of emails with a fundraising ask in them.

The cost per lead for an email is usually cheaper than for a phone number, but the conversion rate (the percentage of people who go on to give a financial gift) is usually much lower.



One charity told us they were converting people at 2% through an email campaign.



The M&R Benchmarks study puts this figure at 0.63%.



Another charity told us they were converting 20% of the people they spoke to with a phone call opt-in - way higher than email.





Sustaining lead generation over time

A lot of lead generation campaigns are just one-off campaigns. You set the ads live, you call lots of people to make a fundraising ask and then you review the results.

You can also sustain your lead generation activity long term. Many charities have offered badges for years and people still love them.

If you want to have a really sustainable lead gen programme, you need to have a really good idea that your audience is responding to. Just desperately wanting a long-term lead generation programme isn't enough!

We know several charities running long-term lead generation campaigns. They used lots of testing to find a long-lasting concept.





How do you switch from phased to always on?

To sustain your lead generation program over a long period of time, make sure you have:

- **a great concept** - one that really resonates with your audience.
- **new audiences** - a plan to change the audiences that your campaigns are targeted at
- **new content** - so you can refresh the campaign content and reduce audience fatigue.



Remember to stop when you can see that a campaign isn't working. Not all campaigns can be long-term legends.

Plan long-term returns

To make the case for lead generation, think long term results, not just short-term.

Don't be put off by high costs per lead at the digital lead generation stage of the campaign. They will still be worth it if the campaign is generating income for your charity three years down the line.

Create long-term projections that show what a high cost per lead is achieving this year for your charity. Not just now, maybe not even this year, but several years out from now.


These returns still exist for lead gen campaigns.

How to create great lead gen content

You need great content to run a great long-term lead-generation campaign.

The content that works for your charity will be different from the content that works for other charities. So testing lots of ideas is the only real way to know what will work for you.

Here are some content tips from charities that are running successful lead-generation campaigns.

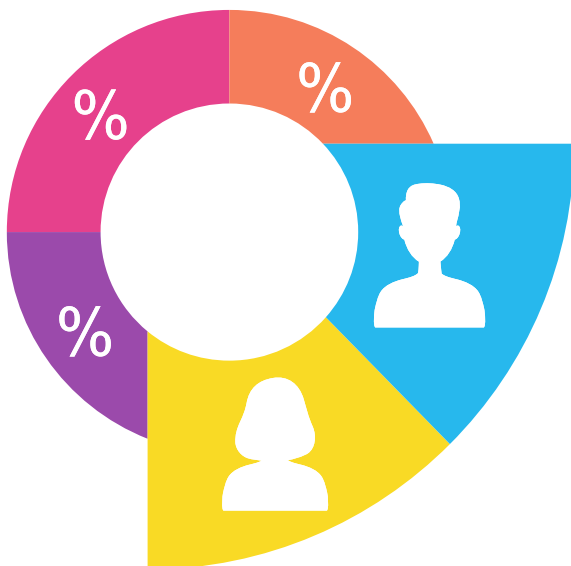
	Place ads in the Facebook newsfeed		Use images instead of video
	Use photos of groups		Use photos of people looking down the camera
	Target lookalike audiences		Target broad audiences
	Start with a positive line about the benefits of your product		Mention campaigns that have a lot of media coverage
	Draw on a strong bank of case studies		Mention shared values in your messaging
	Use powerful storytelling		Make sure ad content is similar to the phone scripts
	Refer to 'official' things in your ad headlines		

If you're not sure what content will resonate, ask the audience. On phone calls, one charity we spoke to asked people what they were planning to do with her badge.

They found they used the badge to refer other people to the charity service, not so much as a displaying their pride in the charity thing.



Get your targeting right



Targeting your campaigns at the right people is crucial for a successful campaigns.

One religious charity told us that broad targeting actually works really well for them. It led to no increase in negative comments, the conversion rate stayed on track, and the cost per lead remains steady. And the contact rate actually increased.

For other charities, lookalike audiences convert well on email but not so much on the phone. A good insight for them.

Another charity segmented the four UK nations separately and found that they also converted differently. This is now a core part of their lead generation targeting and budget decisions.

Get the best conversion rate you can

You can get the best cost per acquisition by putting a really comprehensive testing program in place.

The aim is to get the lowest cost per lead on Meta or other platforms by getting the highest percentage of visitors to your landing page or lead generation form to fill it in.

You can optimise your campaigns using Facebook's inbuilt lead generation forms or a conversion rate optimisation tool like Google Optimise or Visual Website Optimizer.

More tips to improve conversion rate

Choose one test metric for each test you run. That might be the percentage of people who complete the form and give you their phone number in the case of a petition or handraiser campaign.

One charity had great success by moving the phone field to as early in the form as they could get away with.

Other charities have made the phone number field mandatory, although other organisations we spoke weren't so sure about doing this at all. Something to decide your own approach on.

Make sure you choose a message that's going to resonate with cold audiences who are nowhere near as familiar with your charity as warm audiences are.

Use copy that makes getting the phone calls sound appealing somehow. That can improve contact rate whenever you start calling.

When you get successful content, or 'bankers', then test all new content against them. If they don't perform as well, then you know you can continue with your bankers because that's what's going to get the best results

Whatever you do, the key thing is to test the audiences, ad copy and images that you're using to get the most people converting the form as possible.

Get welcome journeys out fast

When you get an email address from someone, send them a series of automated emails to introduce them to your charity.

The attrition rate, which is the rate of people who cancel their regular gift soon after signing up for it, can be quite high with value exchange campaigns.

But if you send out a welcome journey of around six emails welcoming the person to your organisation and telling them about the great work that you do, it can reduce your attrition rate by 25%.

Welcome journeys should tell the recipient about:



What your charity does



Why the action they took is important



Stories of people you've helped or impact you've had



How you'll use any donations they give



Other actions they can take

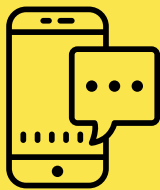


Fundraising asks like a small cash gift or setting up a Facebook Fundraiser

Most email service providers like Mailchimp can set up email welcome journeys.



Other welcome journey options include



SMS welcome messages

You can also send welcome SMS messages.

These messages will be a lot shorter of course but open rates will be higher than email. So you have a great opportunity to engage your new donors this way too.



CRM integration

If you have a CRM like Raisers Edge, then try to integrate your welcome journey with this so that you can see who's interested in becoming a donor and the amount of contact your charities have with them already.

You can use this information to tailor your messages accordingly.

How to resource your lead generation programme

You're sold on doing it. Now you just have to resource it.

You'll need one team doing the digital lead generation and another team doing the phoning.

Those teams could be:

Digital in house.

Passing leads to an external phone agency

External digital agency.

Passing leads to an in-house phone team

Both digital and phone in house.

One external digital lead generation agency and another agency doing the phoning

This is how Platypus Digital and Stratcom work together.

All these models can work if you get great expertise and make sure everyone's working together.

- Plan the ads and the journey with the end goal of regular giving in mind
- Communicate regularly during live campaigns. Everyone should share insight and reporting on which ads and audiences are converting best and fine-tune targeting accordingly
- Only get as many leads as the call centre has the capacity to phone. That way, the people filling in the form don't wait too long for a call and forget who you are!
- Always look holistically at the KPIs, not just cost per lead and conversion rate in isolation

Our clients tell us that Platypus Digital and Stratcom UK are excellent at working in this collaborative and proactive way!

Why work with agencies?

Now of course we're extremely biased, but we think working with specialist digital lead generation and phone agencies is a great way to go.

If you have in-house specialists in both disciplines, then you should definitely use them.

But if you don't have in-house teams, here are a few reasons why you might want to consider bringing in specialist agencies.



Channel experts

You'll be working with teams who do digital lead generation and phone conversion campaigns all day every day. They know what works on the platforms and they can help you get great results.



Scale

A specialist agency has more people and so can find more potential donors than most in-house teams can. That means more funds are raised for your charity.



Fewer headaches

When someone else is running your campaigns for you, you can get on with the rest of your job with at least one less worry on your plate!



Experience with other charities

External agencies have lots of experience in running these campaigns for other charities. This gives them a wider context, which can mean a lower cost per acquisition than you might be able to get in-house.



Top tips for lead generation campaigns

Here are some final top tips to make your lead generation campaign successful.

Work together

Collaboration across teams and specialisms always leads to great results

Create a multi-step journey

Have at least five to seven steps, not just two steps. You'll get better conversion rates and phone contact rates if you do

Build a powerful journey

Use case studies and emotive language to build trust in your charity

Use each channel

Build on its strengths and tailor messaging accordingly

Low CPL doesn't mean lowest CPA

Look at your overall CPA to see if a higher CPL is worth it (it often is)

Call leads quickly

Calling in the sweet spot of 2-7 days means a higher response rate

Measuring success

How do you measure the success of your lead generation campaigns?

You might be getting cheap leads, but they might not convert so well on the phones. So cost per lead is important but may not be the best overall measure of success.

Lifetime value (LTV) is the metric that truly matters, the value of a donor across their whole interaction with your charity. Look at any other metrics as being in service of this goal.

Stage of funnel	Goal	Metric
Top of funnel	Awareness	Impressions
Middle of funnel	Sign ups	Cost per lead
Bottom of funnel	Conversion to donor on the phones	Conversion rate to regular gift Year 1 attrition rate
Bonus bottom of funnel	Donor loyalty	Lifetime value

Measuring success needs a good CRM and the right tracking in place.

Contact Platypus if you need help getting Facebook Pixel or Google Analytics tracking set up.

Some example metrics

How do you stack up against other charities?.

Here are some example lead generation results that other charities are achieving right now.

These are not scientifically gathered or statistically significant at all - they're just anecdotal examples of what other charities are getting right now to give you an idea of how you are getting on.

Cost per lead

- £0.80 for a product-focused ad
- <£1
- £0.60
- £3-£4
- Around £2 and is stable during the year
- £5 for a campaign action
- £25 for an MP action

Phone opt-in

- 20% phone opt-in
- 13% last year
- 16% this year

Conversion to donor on the phone

- 12-18% conversion rate
- Handraisers / petitions 6-10%
- Campaigners 5-10%

Conversion on email

- 2%
- 0.68% (from M&R Benchmarks report)



We can help with lead gen campaigns



We've run lead gen campaigns for lots of charities, including Mental Health Foundation, Concern Worldwide and Dementia UK.

Email Matt or Bethan if you'd like Platypus and Stratcom UK to run a lead generation campaign for you

matt@platypusdigital.com

bethan.francis@stratcomuk.com

