



**SAGE**  
communications

# B2B & B2C Test Ideas for Non-Profits

Thursday, October 24, 2024

2:15 – 2:35 PM



# Today's Objectives

1

Learn strategies that are working in B2C marketing to bring back to your organization

2

Learn more about how nonprofits can take inspiration from direct marketing promotions they're receiving

3

Leave with test ideas to try out

## A little about me...

- Award-winning marketer with 10+ years experience in non-profit fundraising.
- Experience helping clients launch email programs, digital advertising programs, SMS programs, monthly and annual giving programs, and more!
- Joined Sage Communications in early 2023 and began overseeing B2C and B2B clients.
- Current clients include American Express, ADP, Everytown for Gun Safety, C-SPAN, Ocean Conservancy, Mayo Clinic Press and more.



One of my best work memories – working with HRC during Obergefell v. Hodges



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# I. Work Smarter, Not Harder



B2B & B2C Test Ideas for Non-Profits

# Re-run offers that work.

June 2024

Hilton  
GRAND VACATIONS

Offer Ends  
00:00:00  
DAYS HOURS MINUTES

**50,000**  
HILTON HONORS POINTS  
After Your Getaway  
From **\$249/STAY**

LEARN MORE

Terms and Conditions apply.

**GET AWAY + GET 50,000 HILTON HONORS POINTS**  
Enjoy up to 3 nights in your choice of top destinations from \$249.

During your stay, you'll learn about membership with Hilton Grand Vacations and afterwards, you'll get 50,000 Hilton Honors Points — worth 2 NIGHTS at 500+ Hilton properties.

September 2024

Hilton  
GRAND VACATIONS

Invitation ID: 8198772164  
KOT

Offer Ends  
00:00:00  
DAYS HOURS MINUTES

**25,000**  
HILTON HONORS POINTS  
After Your 3-Night Stay In Orlando  
Or Las Vegas For **\$199**

LEARN MORE

Terms and Conditions apply.

**\$199 GETAWAYS + 25,000 HILTON HONORS POINTS**  
Enjoy 3 nights in Orlando or Las Vegas for \$199. During your stay, you'll learn about membership with Hilton Grand Vacations and afterwards, you'll get 25,000 Hilton Honors Points — worth 1 NIGHT at 500+ Hilton properties.

October 2024

Hilton  
GRAND VACATIONS

Invitation ID: 8198772164  
KOT

Offer Ends  
00:00:00  
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After Your 3-Night Stay In Orlando  
Or Las Vegas For **\$199**

LEARN MORE

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**\$199 GETAWAYS + 25,000 HILTON HONORS POINTS**  
Enjoy 3 nights in Orlando or Las Vegas for \$199. During your stay, you'll learn about membership with Hilton Grand Vacations and afterwards, you'll get 25,000 Hilton Honors Points — worth 1 NIGHT at 500+ Hilton properties.



You don't have to reinvent the wheel each month!

# Create a “control” renewal/appeal/acquisition email to test against.

Manage Email Preferences No images? View this online

Account ending: 12345 Member since: 2006

Hello, Ann Cardmember Business Name Studios [Log in](#)

**AMERICAN EXPRESS BUSINESS CHECKING**

WELCOME OFFER:  
**EARN 30,000 MEMBERSHIP REWARDS\* POINTS**  
after performing qualifying activities!

You work hard for your business, so we've made banking easy – and rewarding.

[View Offer Details](#)

With Business Checking, you'll enjoy:

**\$0 MONTHLY FEES<sup>2</sup>**  
No monthly maintenance fees and no minimum balance requirements.

**24/7 SUPPORT**  
Get the powerful backing of American Express. Call or chat with us anytime.

**APPLY IN AS LITTLE AS 10 MINUTES.**

[Learn More](#)

**MANAGE YOUR CASH FLOW WITH CONFIDENCE.<sup>3</sup>**  
Take your business even further with American Express Business Blueprint™.

**BUSINESS BLUEPRINT** A small business digital experience.

- View your select American Express and linked external accounts in one convenient location for a deeper understanding of how money moves in and out of your business.
- Leverage personalized cash flow insights to make better informed financial decisions.

[Learn More](#)

This is banking that rewards you.

EARN 1 MEMBERSHIP REWARDS\* POINT FOR EVERY \$2 YOU SPEND

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Account ending: 12345 Member since: 2006

Hello, Ann Cardmember Business Name Studios [Log in](#)

**AMERICAN EXPRESS BUSINESS CHECKING**

WELCOME OFFER:  
**EARN 30,000 MEMBERSHIP REWARDS\* POINTS**  
after performing qualifying activities!

You work hard for your business, so we've made banking easy – and rewarding.

[View Offer Details](#)

**“** The user experience is beautiful, and I found it so easy to follow. Looking through transactions feels super simple. **”**

— Sandra Lucia Diaz, Lucia Diaz LLC  
Real American Express® customer who was aware that this testimonial may be featured.

With Business Checking, you'll enjoy:

**\$0 MONTHLY FEES<sup>2</sup>**  
No monthly maintenance fees and no minimum balance requirements.

**24/7 SUPPORT**  
Get the powerful backing of American Express. Call or chat with us anytime.

**APPLY IN AS LITTLE AS 10 MINUTES.**

[Learn More](#)

**MANAGE YOUR CASH FLOW WITH CONFIDENCE.<sup>3</sup>**  
Take your business even further with American Express Business Blueprint™.

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- View your select American Express and linked external accounts in one convenient location for a deeper understanding of how money moves in and out of your business.
- Leverage personalized cash flow insights to make better informed financial decisions.

[Learn More](#)

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**AMERICAN EXPRESS BUSINESS CHECKING**

WELCOME OFFER:  
**EARN 30,000 MEMBERSHIP REWARDS\* POINTS**  
after performing qualifying activities!

This is banking that rewards you.  
Turn Membership Rewards® points into deposits,† or redeem them with select travel partners – it's your choice.

[View Offer Details](#)

With Business Checking, you'll enjoy:

**\$0 MONTHLY FEES<sup>2</sup>**  
No monthly maintenance fees and no minimum balance requirements.

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- View your select American Express and linked external accounts in one convenient location for a deeper understanding of how money moves in and out of your business.
- Leverage personalized cash flow insights to make better informed financial decisions.

[Learn More](#)

Get rewarded when you bank.



You could use this strategy for Giving Tuesday / year-end too.

# Resend your top renewal or appeal mailing with a new outer envelope.

AMERICAN EXPRESS P.O. Box 30363 Salt Lake City, UT 84130-0363 Presorted Standard U.S. Postage Paid AMERICAN EXPRESS  
ELECTRONIC SERVICE REQUESTED No Annual Fee

American Express Blue Business Cash™ Card

**SAM A. SAMPLE**  
123 Main Street  
XXXXX  
Anytown, US 12345-6789


Double Welcome Offer

Earn up to **\$500 BACK** + **0% INTRO APR** on purchases for **12 MONTHS**

Terms apply. See inside for rates and fees and other terms.

nerdwallet Best-Of Awards 2024 Best Credit Card Small-Business © 2017-2024 and TM, NerdWallet, Inc. All Rights Reserved.

Built for business — with no annual fee.

 **2% Cash Back** on the first \$50K in purchases each calendar year, then 1% + **Maximum Business Value** Added purchasing power, spending tools and peace of mind for your business.

BBCN-E0624-BBBE

AMERICAN EXPRESS P.O. Box 30363 Salt Lake City, UT 84130-0363 Presorted Standard U.S. Postage Paid AMERICAN EXPRESS  
ELECTRONIC SERVICE REQUESTED No Annual Fee

American Express Blue Business Cash™ Card

**SAM A. SAMPLE**  
123 Main Street  
XXXXX  
Anytown, US 12345-6789


Double Welcome Offer

Earn up to **\$500 BACK** + **0% INTRO APR** on purchases for **12 MONTHS**

Terms apply. See inside for rates and fees and other terms.

nerdwallet Best-Of Awards 2024 Best Credit Card Small-Business © 2017-2024 and TM, NerdWallet, Inc. All Rights Reserved.

The cash back card built for business.

 **2% Cash Back** on the first \$50K in purchases each calendar year, then 1% + **Maximum Business Value** Added purchasing power, spending tools and peace of mind for your business.

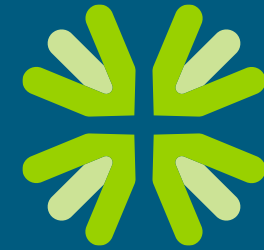
BBCN-E0624-BBWE



Instead of changing up your mailing month-to-month, try changing the OE and resending your top performer.

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## II. Data Is Your Friend



B2B & B2C Test Ideas for Non-Profits



# Use data modeling for your emails – not just direct mail!



**Offer  
Optimization**



**Engagement  
Score**



**RFM  
Analysis**



**Behavioral  
Targeting**



# Be creative on incorporating data points you have.

Hello Rachel | 1,308 points | RR# 406018911

Southwest

SEPTEMBER 24


Login | Book now | Buy points

## Wanna land a low fare?

From Reagan

One-way as low as\*

# \$69



**Book now**

\*Displayed fare was available at time of send. Seats/days/mkts lmted. Restr./excl. apply.

Hello Rachel | 1,308 points | RR# 406018911


Southwest

SEPTEMBER 25

Login | Book now | Buy points

**LIMITED-TIME BONUS**

## Earn 85,000 points.



Spend \$3,000 on purchases in the first 3 months of opening your account.\*

Your current balance:	1,308 points
+ 85,000 points:	85,000 points
<b>Estimated total points:</b>	<b>86,308 points</b>

**Apply now**

The account information is only an estimate for a specific point in time. Please reference your Rapid Rewards® account for the most up-to-date information. Offer ends 10/9/2024. \$69 annual fee.†

†Pricing & Terms | Privacy notice | \*Offer details below

This product is available to you if you do not have a current Southwest Rapid Rewards® Credit Card and have not received a new Cardmember bonus within the last 24 months. This does not apply to Business Card and Employee credit card products.

	You've been a much-loved Rapid Rewards® Member since <b>2008</b>
You flew <b>3</b> time(s) <sup>1</sup> and visited Milwaukee the most, often. So, where will it be in 2024?	
	So far in 2023, you earned <b>47,884</b> Rapid Rewards points. <sup>2</sup> <small>884 counted toward tier status and 884 went towards Companion Pass®. Here's to earning more points and enjoying high-flying rewards in 2024.</small>
<b>Important reminder.</b> Rapid Rewards points don't expire. <sup>3</sup> Just so you know ya know?	 <a href="#">Learn more</a>



You know your donor's state, last giving amount, total giving, etc. – why not use them?

# Customize your content based on past behavior.

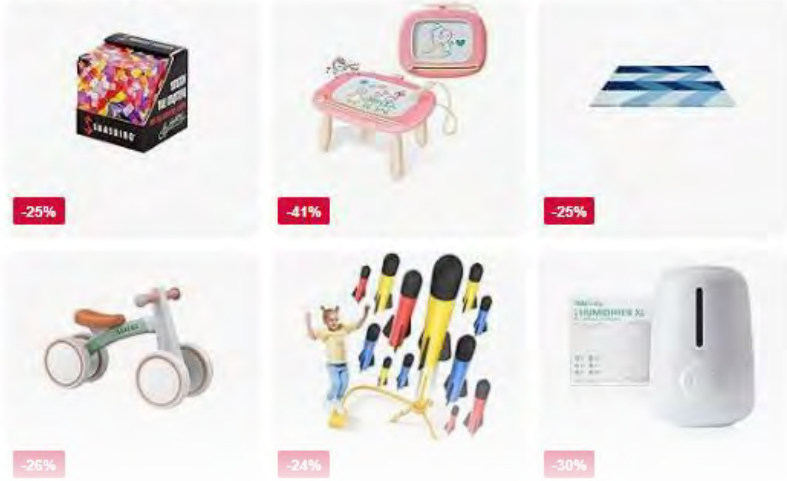

Prime Big Deal Days Buy Again Deals for you

## Prime Big Deal Days

# New day. New deals.

Shop now

Deals for you [Shop deals](#)




A grid of six product images with red discount tags: a box of toys (-25%), a pink table and chair set (-41%), a blue and white striped mat (-25%), a wooden tricycle (-25%), a set of colorful toys (-24%), and a white humidifier (-30%).

Weekly Ad Top Deals New Arrivals

### There's a low price on something you looked at

Save now



**\$93.99 Sale**  
Reg: \$116.99

Playpen Play Yard For Babies Toddlers, Removable Safety Fence With Basketball Hoop, Carrying Travel Bag, Foldable Playmat

Save an extra 5%<sup>2</sup> your way, every day with Target Circle™ Card

Check it out

AMERICAN EXPRESS DON'T live life WITHOUT IT





Account ending: 92005 Member since: 2016

Hello, Rachel Kottler [Log in](#)

### You have offers waiting

Rachel, don't forget you have offers you've already enrolled in. Redeem now and get rewarded.

Enrollment is required and may be limited. Please see full terms below.\*

 <p><b>BOUQS FLOWER SUBSCRIPTION</b></p> <p>Spend \$40 or more, get \$20 back</p> <p><small>See complete offer terms below.</small></p> <p>Redeem now</p>	 <p><b>LULULEMON.COM</b></p> <p>Spend \$100 or more, get \$20 back</p> <p><small>See complete offer terms below.</small></p> <p>Redeem now</p>
 <p><b>TURO - CAR SHARING MARKETPLACE</b></p> <p>Spend \$150 or more, get \$30 back</p> <p><small>See complete offer terms below.</small></p> <p>Redeem now</p>	 <p><b>THE WASHINGTON POST - DIGITAL SUBSCRIPTIONS</b></p> <p>Spend \$15 or more, get \$10 back</p> <p><small>See complete offer terms below.</small></p> <p>Redeem now</p>



This can be based on anything you have data points on.

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## III. One Size Doesn't Fit All



B2B & B2C Test Ideas for Non-Profits

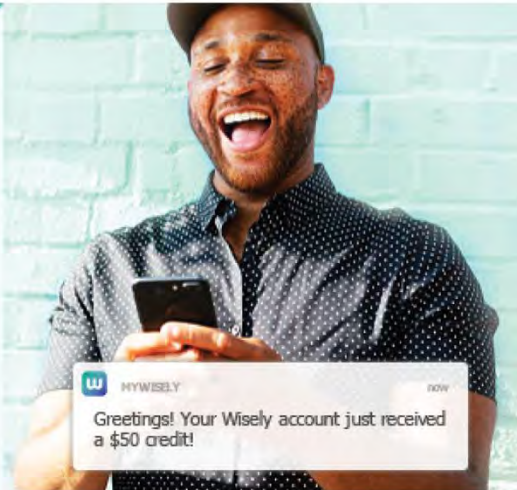
# Version for attributes that will make a difference.

Lorem ipsum dolor sit amet No images? [View this online](#)

 Hello, «Firstname»!  
Access your [Wisely® Direct Account](#) ending in: XXXX **wisely**

**BY SPECIAL INVITATION ONLY:**  
**Get a \$50 credit**  
in your Wisely Direct account when you follow the 3 steps below.<sup>1</sup>


[Activate card](#)



**Hi «Firstname»,**

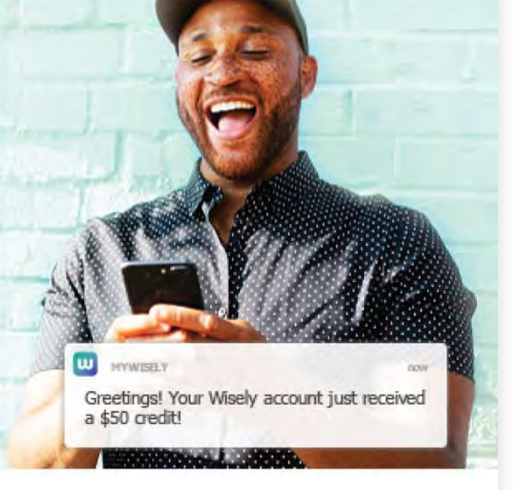
We noticed that you haven't activated your Wisely Direct card and want to let you know about our exciting, limited-time offer!

Lorem ipsum dolor sit amet No images? [View this online](#)

 Hello, «Firstname»!  
Access your [Wisely® Direct Account](#) ending in: XXXX **wisely**

**BY SPECIAL INVITATION ONLY:**  
**Get a \$50 credit**  
in your Wisely Direct account when you follow the 3 steps below.<sup>1</sup>

[Activate card](#)



**Hi «Firstname»,**

During these difficult times, your job status may have changed. We want to make sure you know your Wisely Direct card is yours to keep. Even better, we're here for you with an opportunity to earn a \$50 credit in your account.



For example, if someone gave last Giving Tuesday, call that out prominently.

Test different package formats besides a standard #10 package.



Postcard



Self-mailer



Snap pack



Envelope pack



Invitation



Mini-catalog



Large format



Priority & dimensional



# There are several self-mailer formats that are common in B2C.

AMERICAN EXPRESS  
P.O. BOX 30363  
SALT LAKE CITY, UT 84130-0363

Presorted Standard  
U.S. POSTAGE PAID  
AMERICAN EXPRESS

**Sam A. Sample**  
123 South Main Street  
Address Line 2  
Anytown, NY 01234

CONRAD BORA BORA NUI

**Earn 100,000 Hilton Honors™ Bonus Points with \$0 annual fee**

See inside for rates and fees and Additional Disclosures. Terms apply. HHCP-1019-P10KSM

HILTON SEYCHELLES  
NORTHOLME  
RESORT & SPA

AMERICAN EXPRESS  
HILTON HONORS

3759 876543 21001 7937  
Hilton Rewards number: 123456789 Member Since: 95

C. F. FROST

**imagine** the places you'll travel with a Hilton Honors™ American Express Card

**earn more points**  
in more places to redeem for more travel

**EARN 7X** on eligible purchases at Hilton properties!  
**EARN 5X** on eligible purchases at U.S. restaurants, supermarkets and gas stations!  
**EARN 3X** on all other eligible purchases!

**elevate** your travel with a Hilton Honors™ American Express Card

- Enjoy automatic Silver status with your Hilton Honors Card.<sup>1</sup>
- Earn an upgrade to Hilton Honors Gold status through the next calendar year and by spending \$20,000 on eligible purchases on your Card in a calendar year.<sup>2</sup>
- No blackout dates when redeeming points for hotel stays. Choose from more than 5,600 hotels and resorts within the Hilton portfolio.
- No foreign transaction fees!<sup>3</sup> from American Express when using your Card overseas.<sup>4</sup>
- Global Assist™ Hotline.<sup>5</sup> When you travel more than 100 miles from home, you have 24/7 access to medical, legal, financial or other select emergency coordination and assistance services, including medical and legal referrals, assistance with cash wires, passport replacement, missing luggage and more. Card Members are responsible for the costs charged by third-party service providers.

**3X** on all other eligible purchases!

**apply now**

Get a decision in as little as 30 seconds.

VISIT [amex.us/hhrsvp](https://amex.us/hhrsvp) and enter your RSVP Code, or CALL 1-888-258-3498 and mention your RSVP Code.

or SCAN the code with your iPhone camera or other code reader, and we'll pre-fill your RSVP Code.

RSVP: XXXX XXX XXX XXXX  
Apply by XXXX, XX\*

**earn more points**  
in more places to redeem for more travel

**EARN 7X** on eligible purchases at Hilton properties!  
**EARN 5X** on eligible purchases at U.S. restaurants, supermarkets and gas stations!  
**EARN 3X** on all other eligible purchases!

**escape** to extraordinary with the Hilton Honors™ American Express Card

Dear <INSERT NAME> XXXX-XXXX

Pack your sunscreen and set your away message. The shimmering turquoise water and soft white sand of Wailea and Bora Bora are closer with the Hilton Honors™ American Express Card.

To start, you can earn **100,000 Hilton Honors™ Bonus Points** after you spend \$1,000 or more in purchases with the Card within the first 3 months of Card Membership.<sup>1</sup>

Then, continue to use your Card for travel, restaurants, groceries, and everyday purchases. Redeem your accelerated points to explore the world. Where to next?

Indulge your love of travel with the Hilton Honors American Express Card for a **\$0 annual fee!**<sup>2</sup> Apply by XXXXXXXX.XX.XXXX<sup>3</sup> and you can earn your **100,000 Bonus Points**.

Sincerely,

Mark Weinstein  
Mark Weinstein  
Global Head  
Customer Engagement,  
Loyalty & Partnerships  
Hilton

Douglas Buckminster  
Group President  
Global Consumer Services  
American Express  
Member Since 1986

Hilton HONORS

**7X** on eligible purchases at Hilton properties!

**5X** on eligible purchases at U.S. restaurants, supermarkets and gas stations!

**3X** on all other eligible purchases!

**apply now**

Get a decision in as little as 30 seconds.

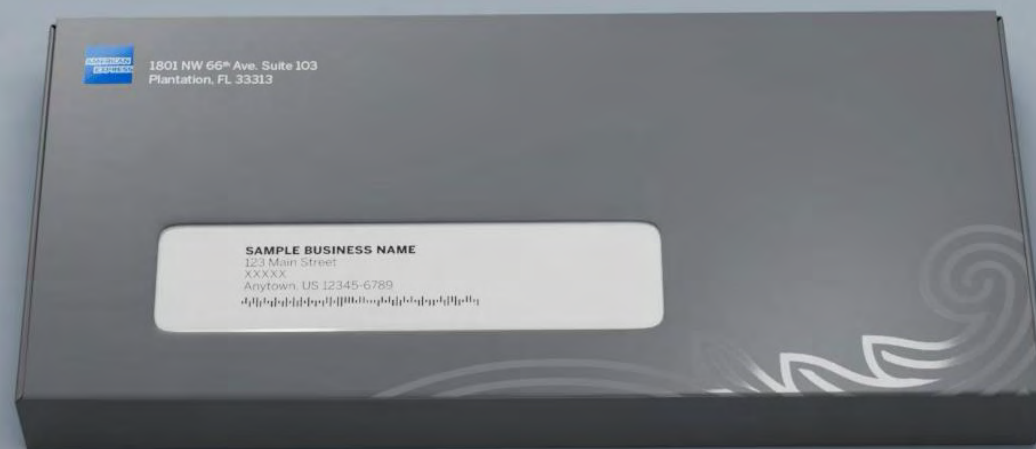
VISIT [amex.us/hhrsvp](https://amex.us/hhrsvp) and enter your RSVP Code, or CALL 1-888-258-3498 and mention your RSVP Code.

or SCAN the code with your iPhone camera or other code reader, and we'll pre-fill your RSVP Code.

RSVP: XXXX XXX XXX XXXX  
Apply by XXXX, XX\*



Don't be afraid to go big for your mid-level/high-level donors OR get creative with your premium packaging!







**SAGE**  
communications

# Thank you!

We look forward to working together.

**Contact:**

Anne Kottler, President | Founding Partner  
[anne@sagecommunications.com](mailto:anne@sagecommunications.com)

Rachel Kottler, Vice President | Partner  
[rkottler@sagecommunications.com](mailto:rkottler@sagecommunications.com)