



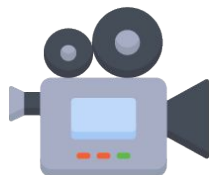
# Creating Emails Part 1

Bloomerang Academy

**Thank you for joining us today. We're glad you are here.  
Please tell us where you are joining from in the CHAT!**



# Housekeeping



**We're recording this webinar!** We'll send you a link to the recording and copy of the slides within 48 hours.

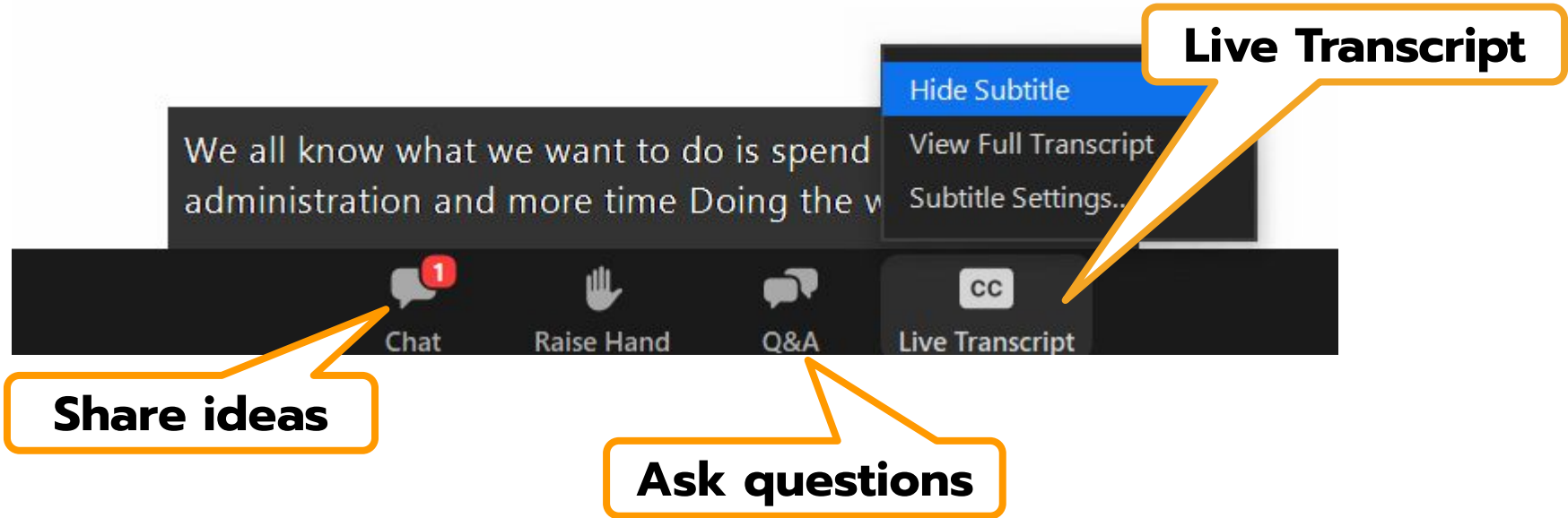


**Feel free to ask questions!** Use the Q&A option to ask questions and the chat option for general discussion. We'll answer questions at the end of the presentation.



**Share your highlights and takeaways** on your favorite social media channel and make sure to give us a follow!

# Housekeeping



The image shows a video player interface with a dark control bar. The video content displays the text: "We all know what we want to do is spend administration and more time Doing the v". The control bar includes icons for Chat (with a red notification bubble containing the number 1), Raise Hand, Q&A, and Live Transcript (with a CC icon). A context menu is open over the Live Transcript icon, showing options: "Hide Subtitle", "View Full Transcript", and "Subtitle Settings..". Three orange callout boxes point to the Chat, Q&A, and Live Transcript icons, containing the text "Share ideas", "Ask questions", and "Live Transcript" respectively.

Our dial in number in case you need it today: **+1 669 900 6833**

If you need more assistance, please reach out to [support@bloomerang.com](mailto:support@bloomerang.com).

**BLOOMERANG**

# Built for purpose

Giving platform designed to improve fundraising outcomes

**Easy-to-use tech,  
built for you**

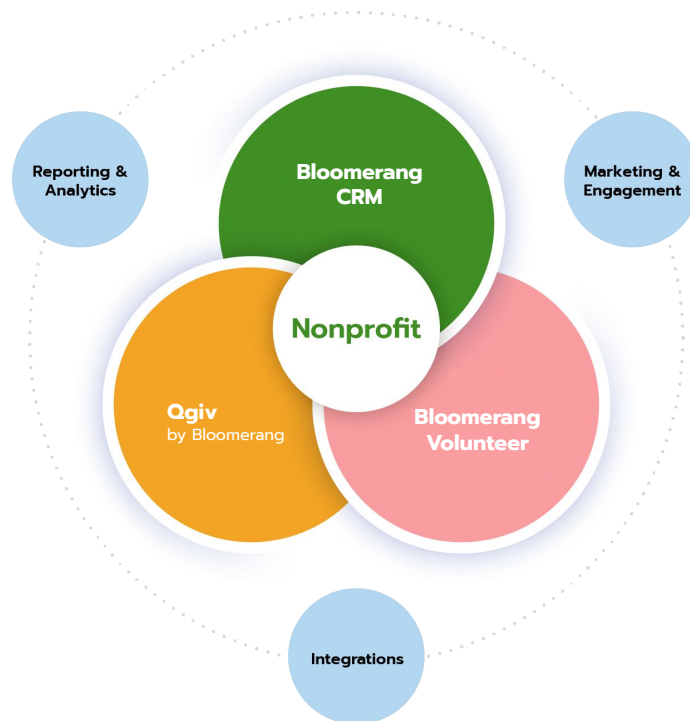
**Industry leading  
solutions**

**Insights that lead  
to better results**

**Engagement that  
inspires giving**

**Increase fundraising  
revenue**

**Automate and simplify  
day-to-day**





## VALUE

# Raise more

Engagement quality increases, effort decreases, and giving soars!

**30%**

Higher overall donation page conversion rates.

**\$108**

Average recurring gift, 4x the industry average.

**15%**

Increase in donor base year-over-year.

**\$180**

Average one-time gift, 50% higher than the industry average.

**25%**

Increase in recurring donor conversion rate.

**26%**

Increase in dollars raised year-over-year.

# What will we cover today?

- Set your organization up for successful email communication
  - Understand what an SPF record is and how it pertains to Bloomerang
  - Have reasonable expectations for a good deliverability rate and sending reputation
  - Verify your Organization Settings
  - Use best practices for Email Interests
  
- Gain a solid foundation to begin creating emails in Bloomerang
  - Understand how email templates function
  - Choose appropriate filters
  - Understand your template-specific settings
  - Familiarize yourself with basic design options
  - Know what sending options are available

# **Set Your Organization Up for Successful Email Communication**



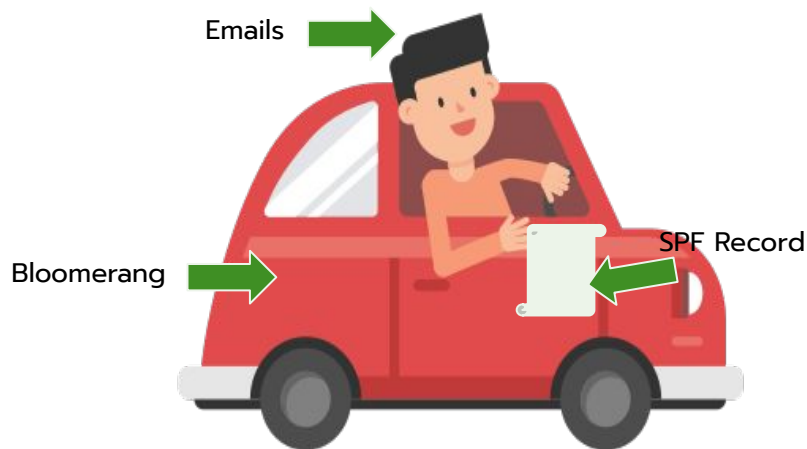
# What is SPF?

**Sender Policy Framework** is a protocol designed to restrict who can use an organization's domain as the source of an email message. SPF blocks spammers and other attackers from sending email that appears to be from a legitimate organization.

To send from your domain in Bloomerang, you need to authorize Bloomerang to send emails on your behalf.



# The Car Analogy



Your **email messages** are like your **passengers**. They have places to go and people to see!

**Bloomerang** is like your **car**. It's how your emails are going to get from Point A to Point B.

Your **vehicle registration** is like your **SPF record**. If you don't have it, you're going to get in trouble and have a hard time reaching your destination!

**You want to authorize Bloomerang to send emails on your behalf.**

# Do I have to set up my SPF record?

No, but it is **highly recommended** for optimal deliverability (just like it is **highly recommended** to register your vehicle in our analogy).

If your domain does not have an SPF record OR if Bloomerang detects that you haven't added our email provider to your existing SPF record, we will send your email from the **Bloomerang Mailman domain** instead which already has an SPF record set up.

This will appear like "**orgname@mailman.bloomerang-mail.com**" in your recipients' inboxes.

[Set Up SPF](#) This is the Knowledgebase area with articles which can walk you through the process of setting up your SPF. Check it out!

# How to Add or Update Your SPF Record

This depends on your domain name provider, also known as your web host.

- Don't know who your web host is? Find it [here](#).
- Need help editing your SPF record within your web host? Find guides [here](#).
- Comprehensive Bloomerang help documentation can be found [here](#).

**Stuck or confused?** Our Support Team will be happy to offer as much guidance as they can!

# Email Deliverability



# There is no such thing as 100% deliverability.

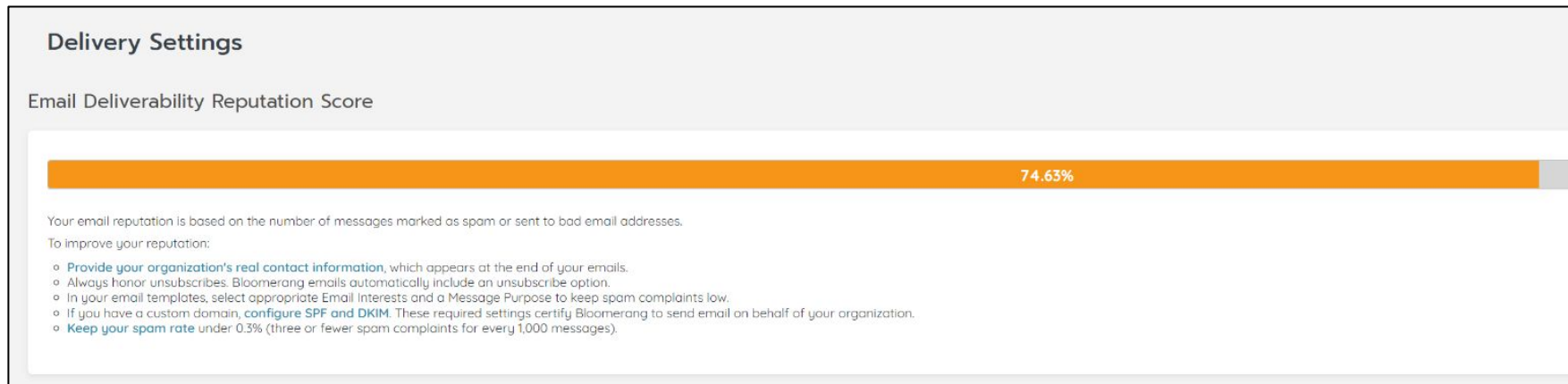
Not all of your emails will reach their target destinations and that's okay.

An acceptable deliverability rate is considered to be about **80% or higher**.

An EXCELLENT deliverability rate is considered to be **above 90%**.

# The importance of a good sending reputation

Your reputation is based on the number of messages marked as spam or sent to bad email addresses. If your domain has a poor sending reputation (even if you have an SPF record set up), your recipients' spam filters are less likely to let your emails in.



[Find out more about the three types of required email authentication: Sender Policy Framework \(SPF\), DomainKeys Identified Mail \(DKIM\), and DMARC \(Domain-based Message Authentication, Reporting and Conformance\).](#)

# How to foster a good sending reputation



- Only send **relevant information** to your constituents.
- Avoid an overabundance of **images and links**.
- **Honor unsubscribes** and don't opt constituents back into your lists.
- **If an email fails to reach its target destination, do not continue trying to send to that email address.**

# Organization Settings





To access in Bloomerang:

- Click “Settings”
- Click “Organization”

This information will appear at the bottom of your mass emails. It is required by law.

### Edit Details

Cancel Save

**Organization Name**  
Guardians

**Email**  
support@bloomerang.com

**Phone**  
866-332-2999

**Country**  
United States

**Address**  
5724 Birtz Road

**City**  
Indianapolis

**State**  
Indiana

**ZIP Code**  
46216

**Website**  
www.bloomerang.com

**Facebook Page**  
facebook.com/yourpage

**Twitter Handle**  
@twitterhandle

**LinkedIn Page**  
linkedin.com/

**NTEE Code**  
M40 Safety Education

**Fiscal Year Start**  
January 1

#### Our Contact Information

Guardians  
5724 Birtz Road  
Indianapolis, IN 46216  
866-332-2999  
<http://www.bloomerang.com>

[Unsubscribe](#) | [Manage email preferences](#)

# Email integrations

If you integrate [Mailchimp](#) or [Constant Contact](#) with Bloomerang, here is where you will find that access.

## Integrations

### Accounting

Select one accounting integration and click Save to configure the settings.

QuickBooks Online

[Connect](#) [Cancel](#) [Save](#)

### Email

Select one email integration and click Save to configure the settings.

Mailchimp

[Go to Mailchimp](#) [Deactivate](#) [Cancel](#) [Save](#)

# Email Interests



# Give your constituents the tools they need to maintain sustainable engagement.



Email Interests New

Displaying 1 - 5 of 5

Volunteer Information	▼
Newsletter	▼ <small>Default</small>
Event	▼
Donor Surveys	▼ <small>Created for Engagement Surveys</small>

Displaying 1 - 5 of 5

Sort: by custom order

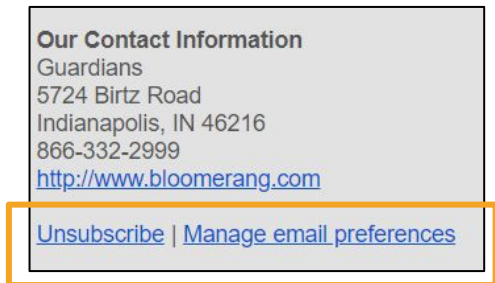
All **Active** Inactive

**!** This list will be displayed to mass email recipients who customize their interests, so make sure that each interest has a recognizable name.

Preview

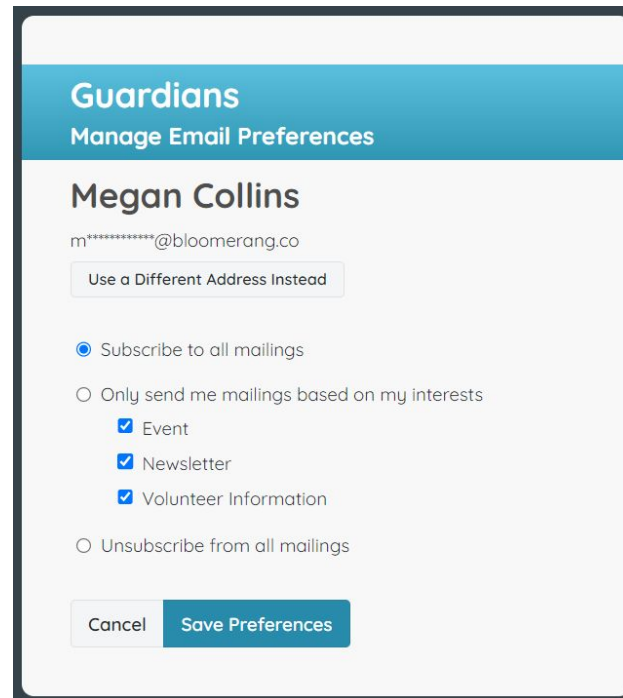
- To access:
  - Click "Emails"
  - Click "Delivery Settings"
  - Click "Email Interests"
- Tailor your interests to your organization
- This will be displayed to constituents when deciding which emails they want to receive

# What does the constituent see?



Email interests should be clearly defined and easy for your constituents to interpret.

Select email interests with intent when sending emails or your constituents are likely to just opt out entirely.



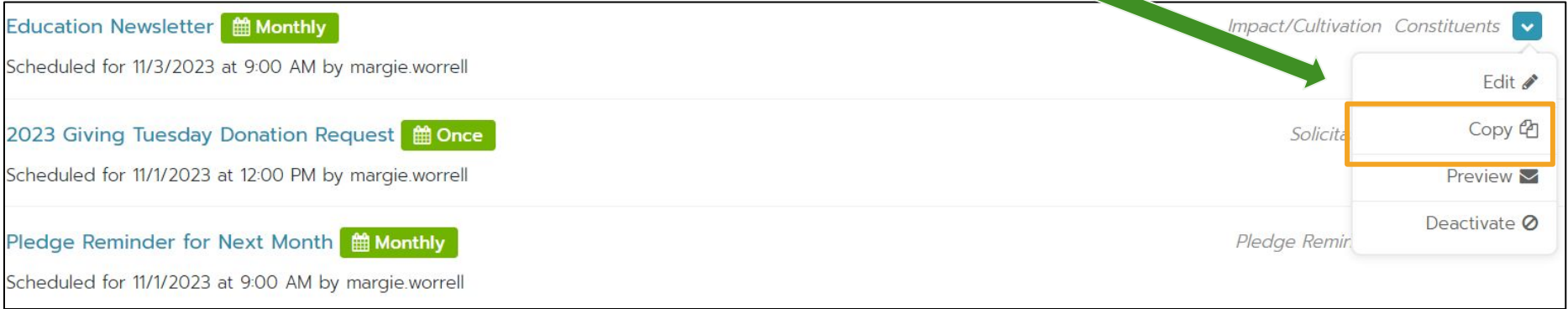
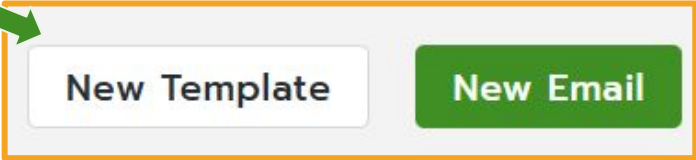
Large, vibrant green Monstera leaves with characteristic holes, positioned in the top-left and bottom-left corners of the slide.

# **Gain a Solid Foundation to Begin Creating Emails in Bloomerang**



# Two ways to start:

**Start with a template  
or a copy of a  
previous email**



You can start with a Bloomerang Template or use a Template you have created and saved


## Choose a Template

Bloomerang Templates      Saved Templates

All

### Campaigns / Appeals

#### Generic Appeal



**These penguins need you—someone who loves them**

Dear [First name],  
As temperatures plummet, our beloved penguins face increasingly harsh conditions. Without your help, the bitter cold threatens the very health and survival of these majestic birds.

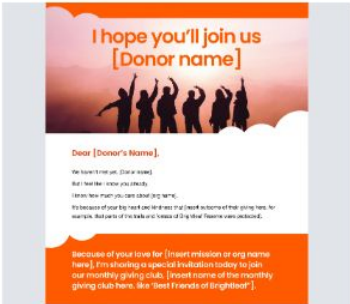
**This is where [First name] steps in.**

**We urgently need your help.**

Can you make a special gift of \$10 today? The creation of this web form is intended to create an appeal to encourage your web browser to be used for fundraising. You are free to use this form to create a gift of \$10 today. Thank you for your help.

John Brinkley, Fundraising and Marketing Director

#### Monthly Donation Appeal



**I hope you'll join us [Donor name]**

Dear [Donor's Name],

We haven't met yet. [Insert name]  
But I hope you'll join us today.  
[Insert how much you want to donate]

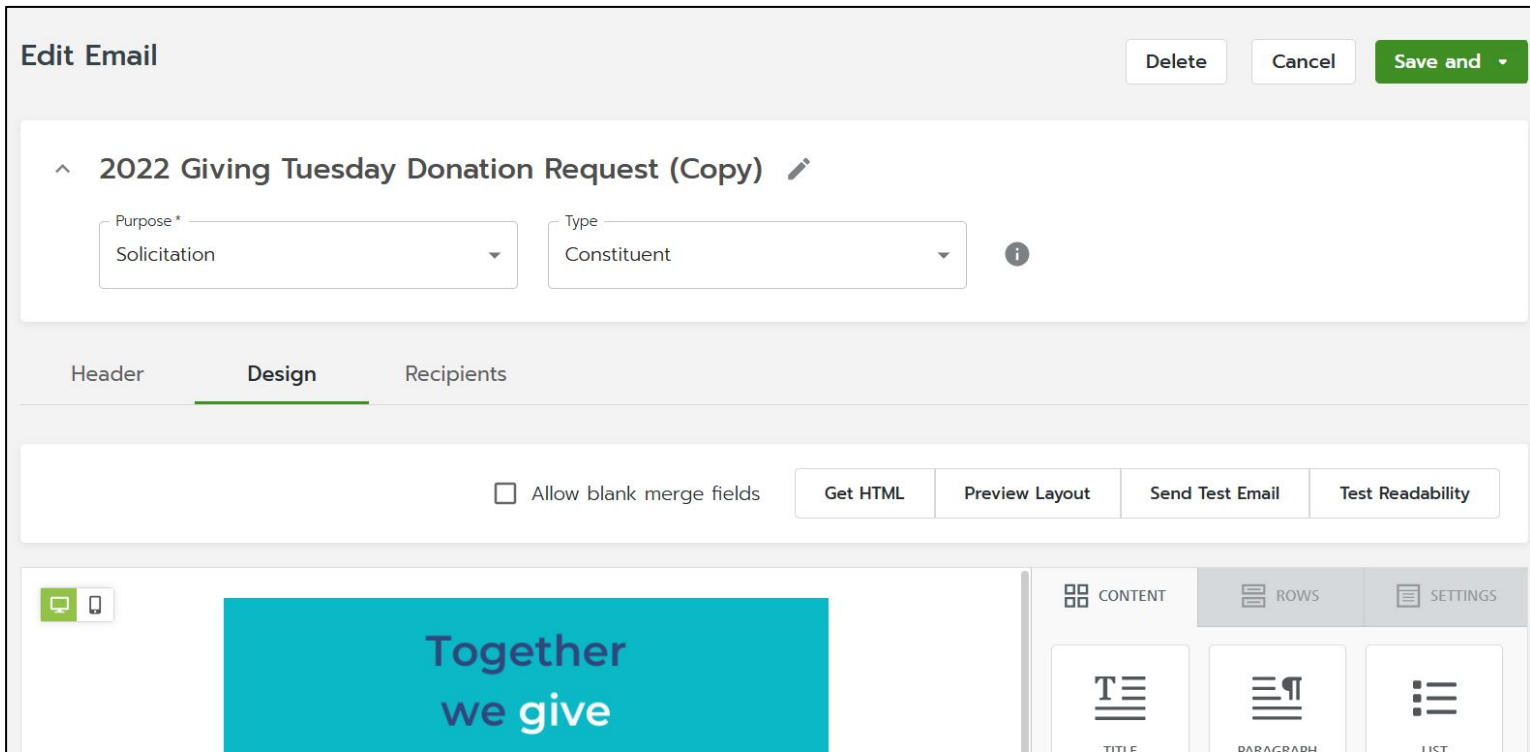
Because of your love for [insert mission or org name here], I'm sharing a special invitation today to join our monthly giving club. [insert name of the monthly giving club here]. [insert Friends of [Organization]]

What are you waiting for? Join today!



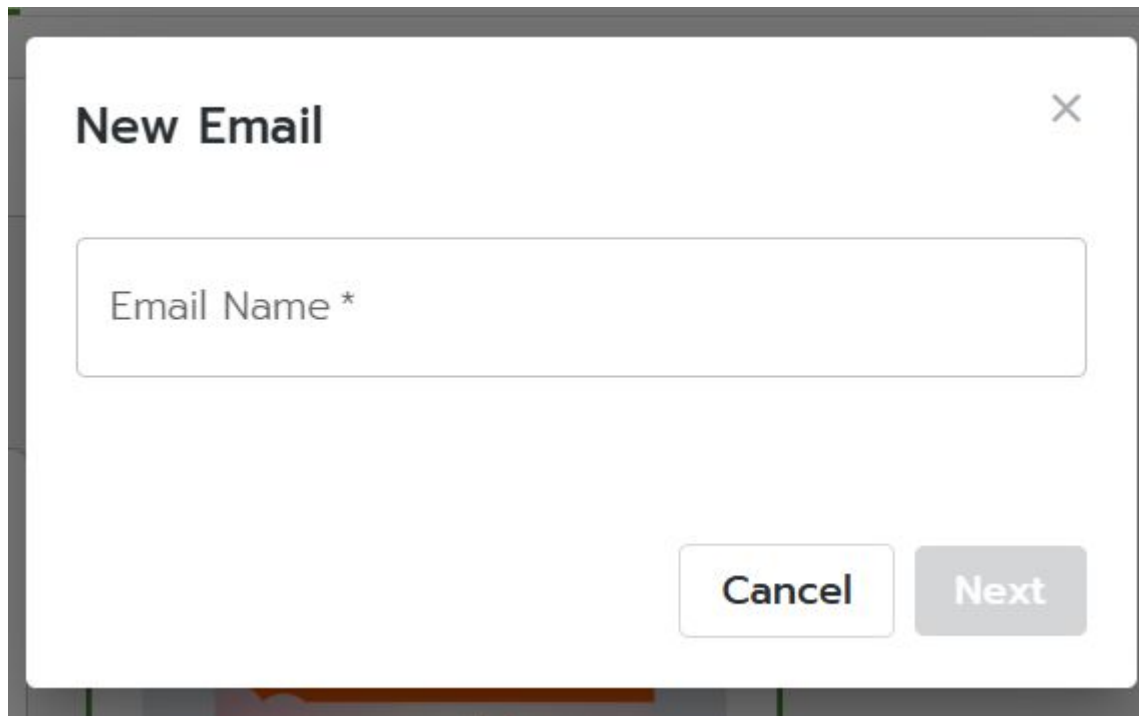
# Copy of a previous email

You can alter and send under a new name



The screenshot shows the 'Edit Email' interface in Bloomerang. At the top, there are three buttons: 'Delete', 'Cancel', and 'Save and' (with a dropdown arrow). Below this is the email title '2022 Giving Tuesday Donation Request (Copy)' with an edit icon. There are two dropdown menus: 'Purpose\*' set to 'Solicitation' and 'Type' set to 'Constituent'. Below these are three tabs: 'Header', 'Design' (which is active), and 'Recipients'. In the 'Design' tab, there is a checkbox for 'Allow blank merge fields' and four buttons: 'Get HTML', 'Preview Layout', 'Send Test Email', and 'Test Readability'. At the bottom, there is a preview area showing a teal banner with the text 'Together we give'. To the right of the preview are three panels: 'CONTENT', 'ROWS', and 'SETTINGS'. The 'CONTENT' panel shows a 'TITLE' block with a large 'T' icon. The 'ROWS' panel shows a 'PARAGRAPH' block with a paragraph icon. The 'SETTINGS' panel shows a 'LIST' block with a list icon.

# You will need to name the email template

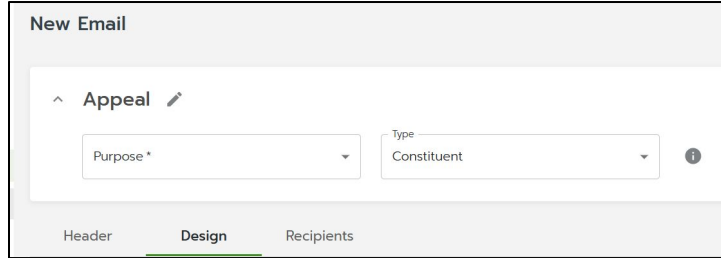


New Email ×

Email Name \*

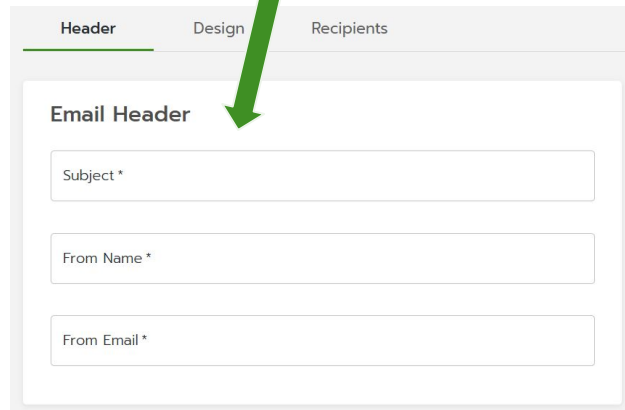
Cancel Next

You will find tabs for **Design, Header and Recipients**. Let's start with Header.



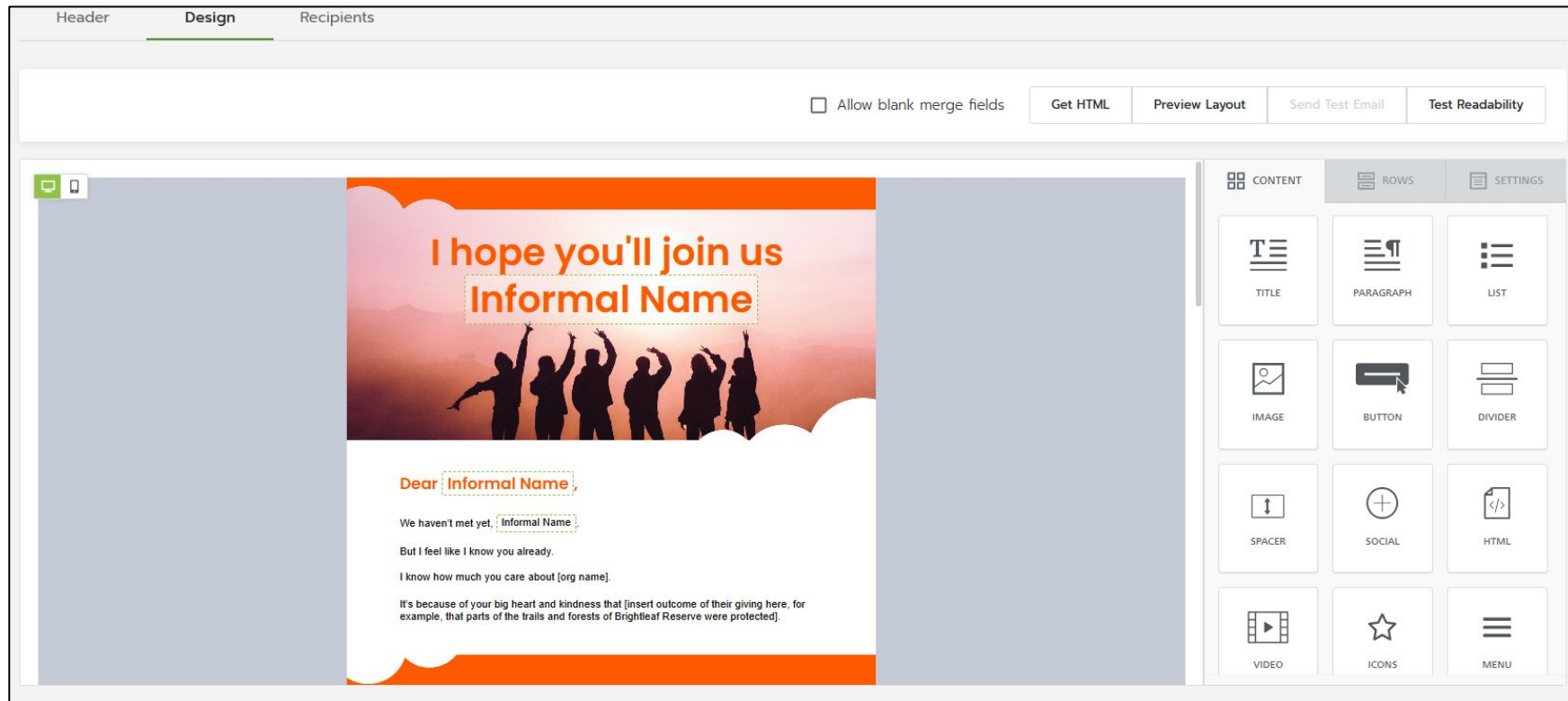
The screenshot shows the 'New Email' interface. At the top, there is a title 'New Email'. Below it, the subject is 'Appeal' with an edit icon. There are two dropdown menus: 'Purpose \*' and 'Type' (set to 'Constituent'). An information icon is visible to the right of the 'Type' dropdown. At the bottom, there are three tabs: 'Header', 'Design' (which is selected and underlined), and 'Recipients'.

Under **Header**, is what constituents will see at the top of your email.



The screenshot shows the 'Email Header' section of the form. It has three tabs: 'Header' (selected and underlined), 'Design', and 'Recipients'. Below the tabs, the title 'Email Header' is followed by three input fields: 'Subject \*', 'From Name \*', and 'From Email \*'. A large green arrow points from the text above to the 'Subject' field.

**Design** is where the magic happens! You can make all kinds of amazing changes here. We will cover design more in **Emails Part 2**.

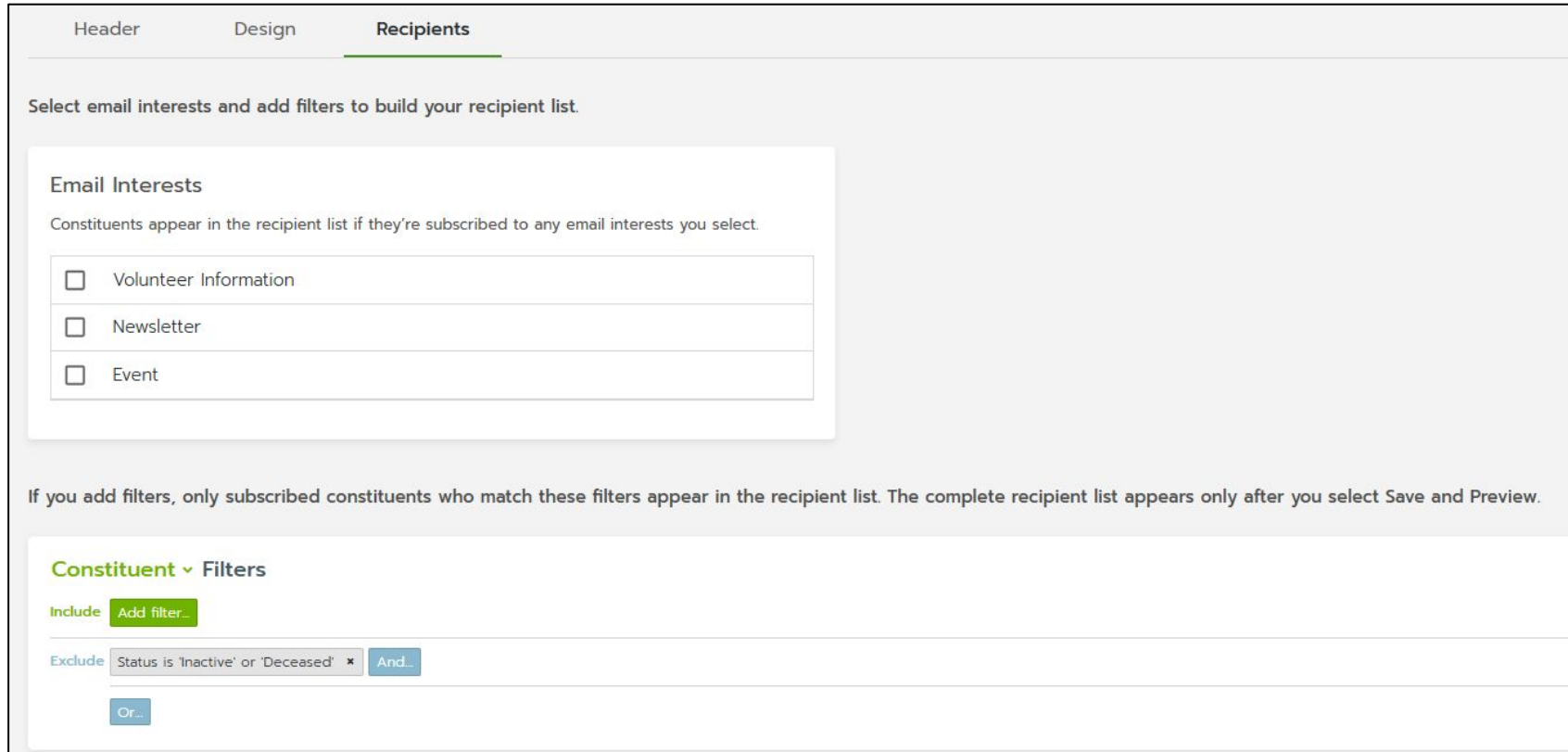


The screenshot shows the Bloomerang email design editor interface. At the top, there are three tabs: "Header", "Design" (which is selected and underlined), and "Recipients". Below the tabs, there is a toolbar with a checkbox labeled "Allow blank merge fields" and four buttons: "Get HTML", "Preview Layout", "Send Test Email", and "Test Readability".

The main workspace is divided into three sections. On the left, there is a mobile device preview icon. The center section displays the email design, which features a header with the text "I hope you'll join us" and "Informal Name" (a merge field) over a background image of people silhouettes. Below the header, there is a salutation "Dear Informal Name," followed by three lines of placeholder text: "We haven't met yet, Informal Name", "But I feel like I know you already.", and "I know how much you care about [org name]". The final line of text is "It's because of your big heart and kindness that [insert outcome of their giving here, for example, that parts of the trails and forests of Brightleaf Reserve were protected]."

On the right side, there is a "CONTENT" panel with three tabs: "CONTENT", "ROWS", and "SETTINGS". The "CONTENT" tab is active, showing a grid of 12 icons for different content types: TITLE, PARAGRAPH, LIST, IMAGE, BUTTON, DIVIDER, SPACER, SOCIAL, HTML, VIDEO, ICONS, and MENU.

**Recipients** is where you decide who will receive this email. You can include or exclude constituents based on certain criteria.



The screenshot shows the 'Recipients' tab in the Bloomerang interface. At the top, there are three tabs: 'Header', 'Design', and 'Recipients', with 'Recipients' being the active tab. Below the tabs, a heading reads 'Select email interests and add filters to build your recipient list.' A white box titled 'Email Interests' contains the instruction 'Constituents appear in the recipient list if they're subscribed to any email interests you select.' Below this are three rows, each with a checkbox and a label: 'Volunteer Information', 'Newsletter', and 'Event'. Below the white box, a paragraph states: 'If you add filters, only subscribed constituents who match these filters appear in the recipient list. The complete recipient list appears only after you select Save and Preview.' At the bottom, there is a section titled 'Constituent Filters'. It has an 'Include' section with an 'Add filter...' button. Below that is an 'Exclude' section with a dropdown menu showing 'Status is 'Inactive' or 'Deceased'' and an 'And...' button. At the very bottom, there is an 'Or...' button.

# The interest area does matter...

Constituents with no matching email interests will be pulled out and skipped when you get ready to send the email. Here is a snippet from the skipped recipients listing.

- **Bad email:** Address is not valid.
- **No matching email interests:** Your selected email interest for this email does not match with what the constituent has selected.
- **Opted out:** This constituent has opted out of all email types.

Amber Verllow	amber_verllow_660@demo.initlive.com	Bad email
Anna Adams	margie.worrell+anna@bloomerang.com	No matching email interests
Carl Otis Winslow	margie.worrell+carl@bloomerang.com	No matching email interests
AFC Richmond Foundation	margie.worrell+tedlasso@bloomerang.com	Opted out No matching email interests

Do a **Readability Test** and **Send a test email** and TEST YOUR LINKS!!!

</> Get HTML

👁 Preview Layout

✈ Send Test

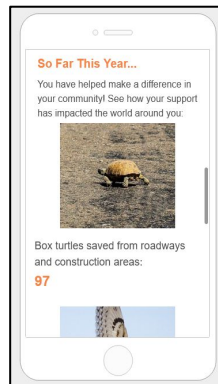
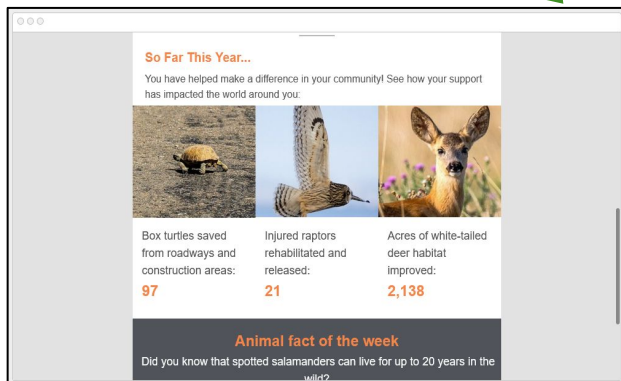
📄 Readability Test

# Tools for Testing

**Edit Email** Academy Example Email Delete Cancel Save And ▾

**Design** Filter Details

Use these tools to check your email prior to sending. </> Get HTML Preview Layout Send Test Readability Test



### Readability Test Results

**The "You" Test** Read More

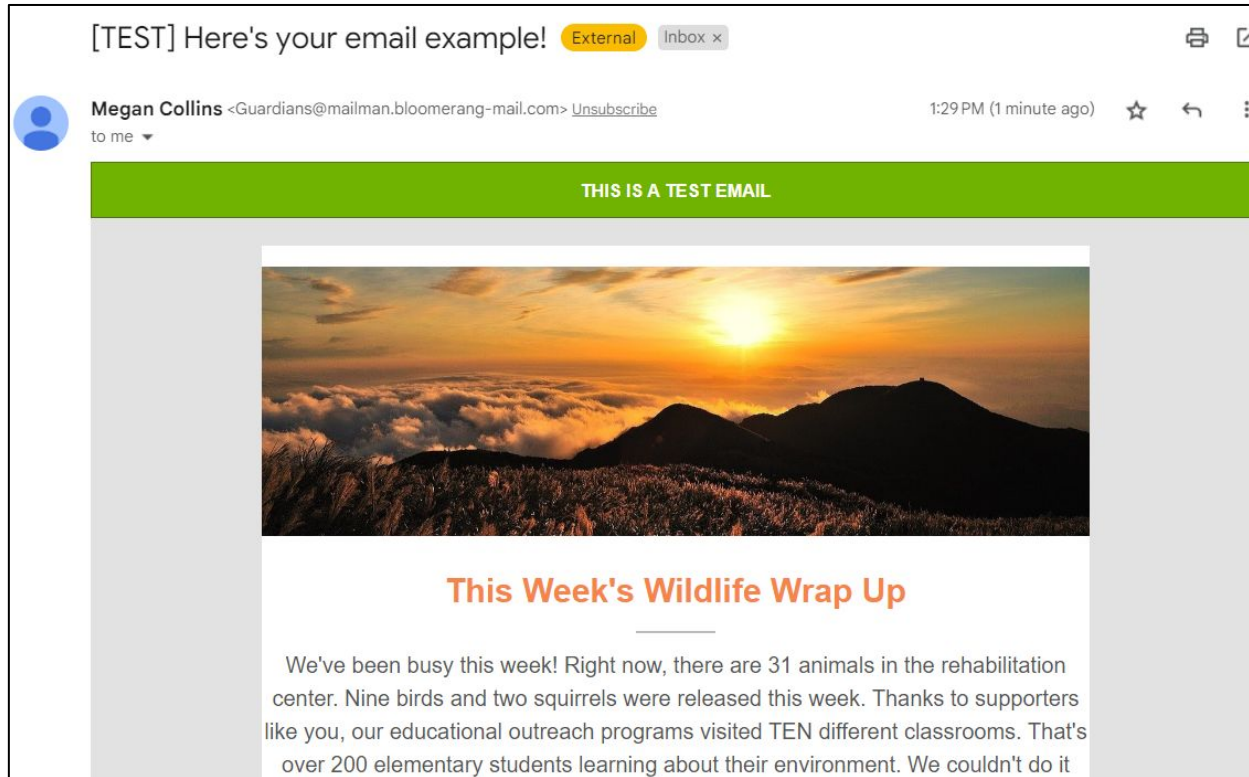
You used "you" words 12 times and "we" words 7 times. Ideally, you should use twice as many "you" words as "we" words.

**Flesch-Kincaid Reading Level Test** Read More

Your writing is at a 6th-grade reading level. It should ideally be between 6th and 8th grade.



# Test Emails



# Preview your email here!

Buttons: Delete, Cancel, Save And ▾

Preview

Keep Editing

Go to Email Home

Preview Email Giving Tuesday Donation Request Cancel Make Changes Send ▾

Constituents Found	11
Email Addresses Found	5
Email Addresses Skipped	-1
Emails to Send	4

[Design Preview](#) | Recipients | Skipped Recipients

Preview < >

To: Pam Beesly <marje.worrel-pambeesly@bloomerang.com>

From: Blossom Oranzutan <marje.worrel@bloomerang.com>

Subject: Giving Tuesday is November 29th!

We skip sending emails to constituents who

- do not have a valid email address
- have unsubscribed from this template's email interests or opted out of all emails
- do not have values, or have more than one value for a transaction merge, field in the email

[View strategies](#) for handling skipped recipients.


Together  
we give  
GIVING TUESDAY

**"It is better to give than to receive."**

Bloom Community Center is participating in GivingTuesday this year. Today we celebrate the mission of providing help, care and support to our neighbors and honor all the work that would not be possible without supporters like YOU. Now more than ever your neighbors need your help. Even a donation of \$5 can make an impact. [Click here](#) to make a difference today.


Not only do we need your support, your help is also needed to spread the word about this important work. Please click on the social media buttons below to tell your friends about how they can help with our vital mission. THANK YOU for making this important work possible. Without you, meeting the basic needs of our neighbors would not be possible. We're thankful to have you as part of our team.

Sincerely,

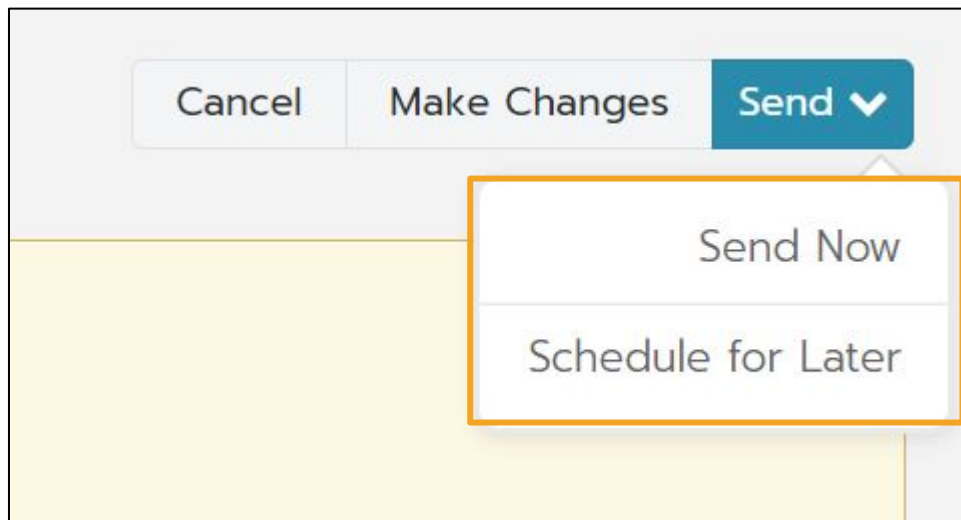
 Bloom Community Center

**Our Contact Information**  
Bloom Community Center  
5724 Birtz Road  
Indianapolis, IN 46216  
866322999  
<http://www.bloomerang.org>

**Please share about our work on your social media channels!**



Send now OR schedule for later!



**Questions? Let's go into  
the database!**

# Thanks for joining!

More tools and resources to help you grow.

Connect with us!

[support@bloomerang.com](mailto:support@bloomerang.com)

Request a demo

[Bloomerang.co/demo](https://bloomerang.co/demo)

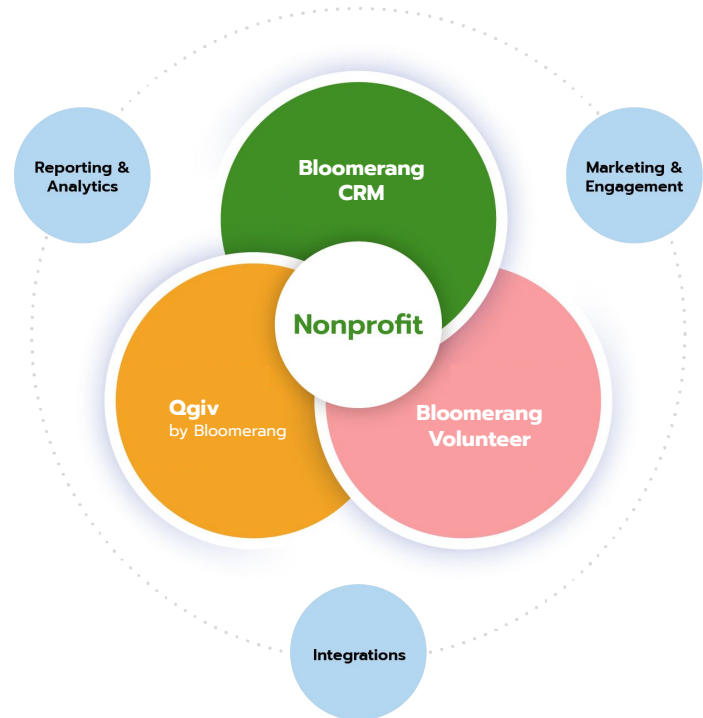
**New!** Bloomerang Learning  
on-demand training

[learning.bloomerang.co](https://learning.bloomerang.co)

Visit the Knowledge Base for  
more “how-to” articles.

We’d appreciate your feedback.

Fill out the post-session survey to let us know how we did.



# Resources

## Knowledgebase

[Set Up SPF and DKIM for Email Delivery](#)

[Set Up Required Authentication Settings for Bloomerang Emails](#)

[Monitor Your Spam Complaint Rate](#)

[Edit Email Structure and Settings](#)

[Edit Email Content](#)

[Send or Schedule Emails](#)

[Filter Emails and Letters](#)



## Other Resources

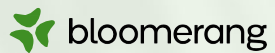
[Google & Yahoo's Email Update: Your Must-Do Checklist](#)

[10 Tips to Stop Your Emails From Going to Spam](#)



**Questions?**





# Thank you!

