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How to Set Up an Email Welcome Series to Engage with New Online Supporters

By Michael Stein

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An email welcome series is essential to making a good first impression with new subscribers on your email list. Your welcome series is a unique opportunity to engage someone with your organization's social mission and programs. Your welcome series should open the door wide and set the tone as your supporters learn about how they fit in with your mission.

Here are a few things to keep in mind as you set up your email welcome series.

Craft a Series of Email Messages

A welcome series usually includes multiple email messages. The first message should go out as soon as possible after the initial subscription event. Pacing thereafter could be at three- or five-day intervals.

Tone and Content Are Important for Cultivation and Engagement

Consider who in your organization might be the best spokespeople for a welcome series. It might be fine to start with a welcome from your executive director. However, be sure to include other staff, board members, or volunteers so you can offer a diverse range of voices to represent different aspects of your organization.

Be sure to craft your language and tone to focus on engagement and cultivation. It's your unique opportunity to strengthen your relationship with someone. The language should focus on the importance of new supporters, volunteers, and donors, and how these individuals help grow and enrich the organization.

Make sure your welcome series presents ways for new people to get more deeply involved. These options could include volunteering, participating in programs, becoming a donor, or joining a committee.

Asking for Financial Support Is Optional in a Welcome Series

While statistics lean in the direction of asking for financial support, I'd make the case that asking for financial support in an email welcome series is optional. You'll have plenty of opportunities to send fundraising appeals to your subscribers after this initial engagement.

Use a Mobile Email Template

Most emails now get opened first on mobile devices. Using a mobile-responsive email template for your welcome series will ensure it is opened and read by the largest number of people. By using a mobile-responsive email template, you're letting your subscribers know from the start of your relationship that you're committed to a good mobile experience.

Integrate New Subscribers into Your Regular Email Communications

There's no reason to hold off on integrating new email subscribers into your regular communications calendar for e-appeals and your e-newsletter. I support adding them fully into the mix right away.

Review Your Email Metrics and Freshen Your Welcome Series Twice a Year

A welcome series is like any other email campaign, so be sure to review your email metrics to assess your performance. You'll want to understand the progression of open rates through your series. Also review click rates to understand which content is most engaging to your new subscriber audience. Use this performance review opportunity to help you decide where to make changes so the content, language, and messaging can stay as fresh as possible.

About the Author(s)



Michael Stein

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📍 32 Old Slip, 24th Floor, New York, NY 10005

☎ (212) 620-4230

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