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| **M2: Messaging Structure EveryAction Advocacy** |

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| **Author** | Kay Todd | **Date Approved** |  |
| **Current Pitch Deck** | (Link) | **M3** | (Link) |
| **Other Related Resources** | * [M2 EveryAction.docx](https://bonterratech.sharepoint.com/:w:/r/sites/BonterraProductOps/Documents%20%20Public/Product%20and%20UX%20Team%20Processes/Product%20Work%20Units/Fundraising%20and%20Engagement/Point%20Solutions/EveryAction/M2%20EveryAction.docx?d=w301a8f111e674cbdad223e1992124d7b&csf=1&web=1&e=wcmpMn) | | |

**Simple Positioning Canvas**

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| **Product name and one line description**  EveryAction – the only AI-powered advocacy and fundraising platform built on a nonprofit CRM. | | | |
| **Market category (and subcategory)**  Market category: Nonprofit CRM, advocacy, fundraising, and marketing software  Subcategory: Gift management, email marketing, mobile messaging, online donation forms, AI fundraising | | | |
| **Competitive alternatives.** What would customers use if this solution did not exist? | **Unique attributes.** What features/capabilities does this solution have that the alternatives do not? | **Value.** What value do those attributes enable for customers? | **Who cares a lot.** What are the characteristics of customers that care a lot about what this solution delivers? |
| **Advocacy-first marketing platforms** *(Action Network, Quorum)*  **Digital fundraising platforms with advocacy add-ons** *(Engaging Networks, Luminate Online)*  **All-in-one CRMs with advocacy included**  *(Charity Engine, NeonOne)* | 1. **Unified advocacy, fundraising, & CRM** – A single, purpose-built system that connects engagement across the entire supporter journey. 2. **Powerful grassroots advocacy** – Empowers nonprofits to mobilize supporters and influence decision-makers with smarter, more reliable message delivery. 3. **AI-powered fundraising** – Uses predictive analytics and automation to optimize donor outreach and increase fundraising success. 4. **Multi-channel outreach:** Activate personalized supporter experiences across advocacy, online giving, email, text and social. | **Increased supporter lifetime value** – Smarter, more personalized engagement increases advocacy actions and donations, moving your mission forward.  **More time and resources for the mission** – A single, unified system eliminates manual data syncing and costly third-party tools, freeing up staff time and budget to focus on growing the movement. | * 501c3/c4 with 2,500 to 25,000 subscribers *Note: 501c3/c4 go to a committee, 501c/4 goes to NGPvan* * Annual revenue of $3M - $15M, primarily from individual gifts * Nonprofits who want to grow advocacy, fundraising and multi-channel supporter engagement, using at least three distinct channels |

**Right to Win**

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| **What is our right to win in this market?** | EveryAction is the only AI-powered advocacy and fundraising platform built on a unified CRM — ensuring personalization at every stage of the supporter journey.  While competitors attach advocacy and fundraising tools onto separate CRMs— limiting nonprofits to personalizing only specific points of engagement — EveryAction empowers organizations to personalize every supporter interaction, across every channel, throughout their full lifetime, all from the same system. |
| **What capabilities bring this differentiation to life?** | **Unified CRM, fundraising & advocacy**   * **A full picture of every supporter** – Track emails, event participation, advocacy efforts, and donations in a single system for smarter engagement. * **One-click conversion with FastAction** – Make it easy for supporters to donate and take advocacy actions, increasing conversion. * **Impact tracking and reporting** – See online and offline donations, major gifts, recurring contributions, and advocacy participation in one place. * **User-friendly interface:** Drag-and-drop reporting and pre-built workflows allow for quick adoption by all skill levels.   **Powerful grassroots advocacy**   * **Unmatched message delivery** – 99.6% delivery rate by first using the legislator’s website comment form, then email, then fax — ensuring every advocacy message gets delivered. * **District-specific communication:** Match supporters to their legislators and automatically insert representative names and districts for more relevant, impactful advocacy. * **Seamless action-to-donation conversion** – Turn engaged advocates into donors through automated, data-driven follow-up campaigns.   **AI-powered fundraising**   * **Optimized Ask** – Increases average donation by surfacing the ideal ask amount based on donor history. * **Built-in predictive AI models –** Identify key supporter segments, enabling targeted engagement strategies to:   + Retain at-risk supporters   + Convert one-time donors into sustainers   + Upgrade mid-tier donors   + Pinpoint major gift prospects   + Reactivate lapsed contributors   **Multi-channel marketing automation**   * **Scalable email marketing** – Build, A/B test, and automate personalized emails powered by full supporter history. * **Cross-channel messaging** – Reach supporters across email, text, social, and direct mail—all from one platform. * **Advanced attribution and lead scoring** – Track engagement and conversions across all campaigns to maximize revenue and identify top prospects. |
| **Why can’t competitors do this?** | When nonprofits seek technology to drive advocacy and fundraising programs, they typically face three flawed options:   1. **Advocacy-first marketing platforms (Action Network, Quorum):** Mobilize supporters effectively but lack built-in fundraising capabilities and robust CRM —missing opportunities to track the full supporter journey and turn advocates into donors. 2. **Digital fundraising platforms with advocacy add-ons (Engaging Networks, Luminate Online):** Built for digital fundraising, but treat advocacy as an afterthought. Supporter journeys are disjointed, resulting in weaker relationships, lower retention, and missed revenue from advocates who never re-engage. 3. **All-in-one CRMs (Charity Engine, NeonOne):** Marketed as “all-in-one,” but rely on disconnected modules and outdated tools. Their basic email blasts and rigid workflows can’t adapt as supporter needs evolve, limiting personalization and forcing teams to purchase third-party tools to fill the gaps.   The result? Supporters engage once but don’t stay connected, and nonprofits miss critical revenue opportunities. Without AI-powered personalization across every channel and lifecycle stage, nonprofits send generic asks, fail to convert advocates into donors, and struggle to build lasting relationships — leading to lower retention, unrealized fundraising potential, and lost momentum for their cause. |
| **Why does this matter for the customer?** | Advocates and donors aren’t separate audiences — they’re the same people at different stages of engagement. But when platforms treat fundraising and advocacy as disconnected efforts, nonprofits miss critical chances to deepen relationships over time.  EveryAction unifies the supporter journey, using personalized engagement to turn one-time actions into sustained involvement. The result? Higher retention, more frequent giving, and increased supporter lifetime value — helping your organization mobilize change.  **Sandy Hook Promise Case Study** With EveryAction, Sandy Hook Promise targeted the right supporters with the right message at the right time with incredible results:   * **289,000+ advocacy actions** – Supporters sent 230,000 letters to the Senate and made 59,000 trackable phone calls, helping pass key legislation to advance their mission. * **92% growth in supporter list** – Sandy Hook Promise’s supporter base nearly doubled, expanding their ability to mobilize for future campaigns. * **4x increase in fundraising revenue** – By optimizing fundraising and engagement strategies, Sandy Hook Promise quadrupled their donations year over year.   “EveryAction’s ability to refine segmentation by likely action takers in priority districts was mission critical for the campaign’s success.” |

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| **Message Headlines** | |
| **BUSINESS VALUE** | EveryAction: the only AI-powered advocacy and fundraising platform built on a nonprofit CRM |
| **CHANGE** | Nonprofit engagement has fundamentally changed   * More urgency: Policy changes have put billions in nonprofit funding at risk — 60% to 80%  of nonprofits receiving government grants could face financial shortfalls. * More personalization: Fundraising email response rates dropped 16%, while advocacy email response fell 10%. Why? Supporters tune out generic outreach. * More channels: Donors reached across multiple channels give 3x more than those reached by just one. |
| **IMPLICATIONS** | These changes have cost nonprofits in lost donations, missed policy momentum, and campaigns falling short of their goals. |
| **RUB** | Nonprofits seeking personalization have had limited choices   * Advocacy platforms drive advocacy actions, but limit impact with low deliverability and lack fundraising features. * Fundraising platforms focus on online donations, but treat advocacy as an afterthought and silo your supporter data. * “All-in-one" CRMs claim to unify data, but lack advocacy, fundraising and marketing features and require third-party platforms to achieve personalization.   These approaches result in a disconnected supporter experience. |
| **SOLUTION** | EveryAction: the only nonprofit CRM built for full journey personalization |
| **KEY CAPABILITIES** | * Unified CRM, fundraising & advocacy * Powerful grassroots advocacy * AI-powered, personalized fundraising * Multi-channel marketing automation |
| **CREDIBILITY** | Sandy Hook Promise case study |

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| **Message Narrative** | |
| **BUSINESS VALUE** | EveryAction is the only AI-powered platform that unifies advocacy, fundraising, and CRM — driving full-journey personalization that increases supporter lifetime value, delivers more predictable revenue, and drives real change. |
| **CHANGE** | Nonprofit engagement has fundamentally changed—yet most technology hasn’t kept up.   * **Advocacy is more urgent than ever.** Policy changes have put billions in nonprofit funding at risk — 60% to 80% of nonprofits receiving government grants could face financial shortfalls if that support is reduced or eliminated. More than ever, nonprofits must be equipped to rapidly mobilize supporters to protect the resources their missions depend on. Source: [Urban Institute](https://www.urban.org/research/publication/what-financial-risk-nonprofits-losing-government-grants) * **Personalization is no longer optional.** Fundraising email response rates dropped 16% last year, while advocacy email response fell 10%—clear signs that supporters are tuning out generic outreach. Supporters now expect personalized, relevant engagement across every touchpoint, and organizations that can’t deliver are being ignored. Source: [M+R Benchmarks, 2024](https://mrbenchmarks.com/#) * **Multichannel engagement drives results.** Donors reached across multiple channels give 3x more than those reached by just one. Yet many nonprofits still rely on disconnected systems, making it nearly impossible to deliver a unified supporter experience. Source: [NextAfter](https://www.nextafter.com/blog/advanced-guide-to-integrated-fundraising/) |
| **IMPLICATIONS** | Disconnected systems aren’t just inefficient — they’re expensive. When your tools don’t talk to each other, you lose track of who took action, who gave last year, who’s ready to upgrade — and that means lost donations, missed policy momentum, and campaigns falling short of their goals. |
| **RUB** | Nonprofits looking to scale advocacy and fundraising face three flawed technology choices:   * **Advocacy tools** drive supporter action but lack built-in fundraising, making it difficult to convert activists into donors. * **Fundraising platforms** focus on donations but treat advocacy as an afterthought, leading to disconnected supporter experiences. * **All-in-one CRMs** claim to unify data but lack true marketing automation, limiting personalization and engagement.   Without a system designed to integrate advocacy and fundraising, nonprofits struggle to build lasting supporter relationships, leading to lower retention, weaker advocacy impact, and missed revenue potential. |
| **SOLUTION** | EveryAction is the only AI-powered advocacy and fundraising platform built on a unified nonprofit CRM — automating personalized engagement to turn supporters into changemakers.  With EveryAction, nonprofits can:   * **Seamlessly connect advocacy and fundraising.** Convert engaged advocates into donors with targeted, AI-driven follow-ups — unlocking deeper engagement that fuels long-term impact. * **Engage supporters across every channel.** Activate email, text, social, and direct mail campaigns in one platform to maximize action, retention, and the momentum needed to mobilize change. * **Optimize fundraising with AI-driven insights.** Predictive analytics determine the best timing, messaging, and donation asks to maximize revenue and expand your ability to act. * **Eliminate silos and manual work.** A single system tracks every supporter interaction, cutting administrative workload and freeing up your team to focus on the mission. |
| **KEY CAPABILITIES** | **Unified CRM, fundraising & advocacy**   * **A full picture of every supporter** – Track emails, event participation, advocacy efforts, and donations in a single system for smarter engagement. * **One-click conversion with FastAction** – Make it easy for supporters to donate and take advocacy actions, increasing conversion. * **Impact tracking and reporting** – See online and offline donations, major gifts, recurring contributions, and advocacy participation in one place. * **User-friendly interface:** Drag-and-drop reporting and pre-built workflows allows for quick adoption by all skill levels   **Powerful grassroots advocacy**   * **Unmatched message delivery** – 99.6% delivery rate by first using the legislator’s website comment form, then email, then fax — ensuring every advocacy message gets delivered. * **District-specific communication:** Match supporters to their legislators and automatically insert representative names and districts for more relevant, impactful advocacy. * **Seamless action-to-donation conversion** – Turn engaged advocates into donors through automated, data-driven follow-up campaigns.   **AI-powered fundraising**   * **Optimized Ask** – Increases average donation by surfacing the ideal ask amount based on donor history. * **Built-in predictive AI models –** Identify key supporter segments, enabling targeted engagement strategies to:   + Retain at-risk supporters   + Convert one-time donors into sustainers   + Upgrade mid-tier donors   + Pinpoint major gift prospects   + Reactivate lapsed contributors   **Multi-channel marketing automation**   * **Scalable email marketing** – Build, A/B test, and automate personalized emails powered by full supporter history. * **Cross-channel messaging** – Reach supporters across email, text, social, and direct mail—all from one platform. * **Advanced attribution and lead scoring** – Track engagement and conversions across all campaigns to maximize revenue and identify top prospects. |
| **CREDIBILITY** | **Sandy Hook Promise Case Study**  With EveryAction, Sandy Hook Promise targeted the right supporters with the right message at the right time with incredible results:   * **289,000+ advocacy actions** – Supporters sent 230,000 letters to the Senate and made 59,000 trackable phone calls, helping pass key legislation to advance their mission. * **92% growth in supporter list** – Sandy Hook Promise’s supporter base nearly doubled, expanding their ability to mobilize for future campaigns. * **4x increase in fundraising revenue** – By optimizing fundraising and engagement strategies, Sandy Hook Promise quadrupled their donations year over year.   “EveryAction’s ability to refine segmentation by likely action takers in priority districts was mission critical for the campaign’s success.” |

**Market Context**

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| **Market Definition** | **Internal Market Name:** F&E Midmarket  **Definition:** 501c3/c4 with at least 5,000 contacts  **Size:** $3M-15m annual revenue |
| **Ideal Customer Profile** | * 501c3/c4 with 2,500 to 25,000 subscribers * Annual revenue of $3M - $15M, primarily from individual gifts * Nonprofits who want to grow advocacy, fundraising and multi-channel supporter engagement, using at least three distinct channels   ***Reasoning:***  *EveryAction was built specifically for the way nonprofits operate — especially when it comes to advocacy and fundraising. It meets their needs in a single product, eliminates the need for additional staff or siloed tools, fosters collaboration across teams, and provides a unified database for all revenue-related functions. In these critical areas, EveryAction consistently outperforms its competitors.* |
| **Target Buyer** | **Target Buyer:**   * Department: Development * Job Level: Chief Development Officer (Development Director in smaller organizations) * Primary Job: Raising all the organization’s revenue * Typical Boss: CEO and indirectly the Board * Typical Direct Reports: Data/Operations Director, Digital Director (oversees Digital Fundraising and Advocacy), Donor Stewardship, Donor Communications, Major Giving, Planned Giving, Mid-level Giving, Corporate Giving, and Fundraising Events.   **Examples Profiles of Target Buyers**   * [Kathleen Gregory, Director of Development/Co-Executive Director, Public Justice Center](https://www.linkedin.com/in/kathleengregorycfre/) * [Kendra Penry, Executive Director, Stokes Nature Center](https://www.linkedin.com/in/kendra-penry-clutter-0b40b716/) * [Laura Minnigerode, Development Manager, Texas Gun Sense](https://www.linkedin.com/in/laura-minnigerode-938628/)   ***Reasoning:*** *The money for tech purchases usually sits in Development, and the CDO controls it. The direct reports listed above outline typical nonprofit revenue generation structure.*  Excluded Buyers:   * Program Officers * Board Members   ***Reasoning:*** *Program Officers are often interested but don’t have any say in the budget and sometimes can distract from core problems/functions the software is meant to resolve.*  *Board Members often promote the software they use at work and often they are in the for-profit world and are recommending something that isn’t appropriate to nonprofits.* |

**Competitive Context**

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| **Primary Competitors (link to website)** | **Competitor** [**“Approach”**](https://www.jnetmarketing.com/post/positioning-isn-t-a-statement-it-s-how-you-win) | **Notable Competitor Capability Strengths** | **Notable Competitor Capability Gaps** | **Notable Bonterra Capability Gaps** |
| [**Action Network**](https://actionnetwork.org/) | **Advocacy-Focused Point Solutions**  Specializes in mobilizing supporters for social change, offering tools to create petitions, manage campaigns, and engage via email and social media. Its advanced analytics and reporting are notable strengths. | **Grassroots Mobilization:** Tailored for progressive organizations, excels in mobilizing supporters for social change.  **Affordability:** Cost-effective solutions suitable for smaller organizations or specific campaigns.  **Advanced Analytics & Reporting:** Provides deep insights into advocacy campaign performance. | **Email-only delivery:** Focused on sending emails to representatives, not inputting via comment forms which have a much higher impact  **Limited CRM Features:** Lacks comprehensive constituent relationship management functionalities, requiring external integrations.  **No Advanced Fundraising Tools:** Does not offer built-in online fundraising or AI-driven fundraising capabilities.  **Basic Marketing Automation:** Limited capabilities for personalized donor and advocacy supporter engagement. | **Ease-of-use:** Action Network is easy to get up and running, especially for organizations who only want to replace their advocacy functionality.  **Market reputation:** Action Network likes to position themselves as scrappy, underdog, truly progressive vs. Bonterra as a big corporate, PC-funded conglomerate. |
| [**Quorum**](https://www.quorum.us/solutions/grassroots-advocacy/) | **Advocacy-Focused Point Solutions**  Empowers public affairs and advocacy professionals with tools to map policy landscapes, track developments, and take action on key issues. Users highlight its user-friendly interface and effectiveness in setting up action alerts. | **Legislative Tracking:** Real-time tracking of legislation aids organizations in staying updated on policy changes.  **Comprehensive Advocacy Tools:** Offers grassroots advocacy, stakeholder engagement, and policy monitoring in one platform. | **No CRM Functionality:** Requires integration with third-party CRMs for full donor and advocate management.  **No Online Fundraising Capabilities:** Lacks built-in tools for donation management and AI fundraising.  **Limited Marketing Automation:** Advocacy-focused but does not provide robust engagement automation for donors. | **Full stack advocacy:**  Quorum purchased Phone2Action and offers grasstops advocacy. EveryAction only offers grassroots advocacy. |
| [**Engaging Networks**](https://www.engagingnetworks.net/solutions/advocacy/) | **Nonprofit Marketing and Fundraising Point Solutions with Advocacy (eCRM)**  A flexible platform that combines advocacy, fundraising, email, peer-to-peer, events, and data management. Users appreciate its adaptability and comprehensive feature set. | **Innovative Tools:** Offers advanced features like marketing automation, digital wallets, and machine learning to enhance supporter engagement.  **High Client Satisfaction:** Boasts a 97% client retention rate and a 4.8/5-star support rating, reflecting strong customer support and satisfaction.  **Integrations:** Strong integration strategy, Salesforce and Microsoft Dynamics | **Disappointing Feature Execution:** Users report advocacy forms failing, issues with recurring giving plans, and reliance on external support.  **Limited Scalability:** Struggles to support enterprise clients effectively.  **Weak Customer Support:** Small team leading to long service ticket resolution times.  **Cumbersome Integrations:** Additional contracts, fees, and potential data transfer issues.  **Not a Full-Fledged CRM:** Requires integration to other CRM platforms | **Limited International Capabilities:** EveryAction lacks built-in support for international advocacy and fundraising compared to Engaging Networks.  **Customization Constraints:** While EveryAction provides automation and CRM functionality, it offers fewer deep customization options for enterprise clients.  **Integration Flexibility:** Some organizations may require additional integrations for specific use cases, where Engaging Networks provides broader API and partner support.  **Perceived Cost vs. Value:** Some customers may view EveryAction as a higher-cost solution, especially when comparing discount-driven pricing models from Engaging Networks.  **Perception Post-Bonterra Merger:** The recent merger has raised concerns about EveryAction’s ability to innovate and provide responsive customer support. |
| [**Luminate Online**](https://www.blackbaud.com/products/blackbaud-luminate-online) | **Nonprofit Marketing and Fundraising Point Solutions with Advocacy (eCRM)**  Part of the Blackbaud suite, it offers integrated online marketing tools, including email campaigns and advocacy features. It's recognized for its scalability and performance. | **Scalability:** Designed to support large-scale nonprofits with extensive donor bases and complex campaign needs.  **Comprehensive Suite:** Integrates various tools, including email marketing, fundraising, and advocacy, into one platform. | **Dated User Experience:** Reports of usability issues and system downtime. Requires custom code to look really good.  **Weak Advocacy Features:** Advocacy functionalities are less robust than competitors.  **Requires External Integrations:** Not a fully unified platform.  **Price:** Expensive! | **E-commerce:** Fully built in ecommerce functionality  **Website hosting:** Luminate can host websites as well, allowing for personalized website behavior tracking and retargeting. |
| [**NeonOne**](https://neonone.com/partners/ujoin/) | **“All-in-one CRM”**  Offers a comprehensive suite tailored for nonprofits, integrating fundraising, donor management, and advocacy tools. Users commend its user-friendly interface and robust integration capabilities. | **Integrated Ecosystem:** NeonOne focuses on creating a connected ecosystem of nonprofit fundraising tools, offering a comprehensive suite that caters to various nonprofit needs.  **User-Friendly Interface:** Designed for small to midsize nonprofits, NeonOne emphasizes accessibility and ease of use. | **Third-Party Dependencies:** Relies on acquisitions and third-party integrations (not natively built functionality), leading to inconsistencies.  **Limited AI Fundraising Tools:** Lacks predictive analytics for donor engagement. | **Easy-of-use:** EveryAction has a higher level of functionality, which can make it more complicated to learn.  **Price:** NeonOne is a lower-cost option.  **Associations:** NeonOne is strong on associations. |
| [**CharityEngine**](https://charityengine.net/advocacy-software/) | **“All-in-one CRM”**  Provides built-in advocacy software that streamlines data collection and campaign management. Its integration with CRM functionalities allows for targeted and efficient advocacy efforts. | **Comprehensive Integration:** Offers a unified system that combines fundraising, advocacy, events, and email marketing, ensuring all data resides in one platform.  **Automation Capabilities:** Provides automation features that streamline donor engagement and operational workflows. | **Complexity for Smaller Nonprofits:** The extensive features might be overwhelming for smaller organizations with limited resources.  **Promises, promises:** Charity Engine says their product can do everything, but they can’t. | **E-commerce**  **Website hosting: C**an host websites as well, allowing for personalized website behavior tracking and retargeting. |

Why EveryAction Advocacy is different

Striving to encourage the elected officials to either reinforce an effort or encourage them to change their mind.

* All elective officials have comment forms – EveryAction submits a comment form, if the comment form doesn’t work, it will email, if email fails, it’ll fax (all automatically)
  + Automatically flows into backend metrics
  + Emails are not as reportable (most solutions focus on emailing your representatives)
  + We have to maintain the APIs to all of these forms
* How much more effective getting to the comment form?
  + Case study with a marquee but non-controversial organization
    - American Cancer Society Cancer Action Network
  + Webinar/white paper talking to a congressional staffer
    - NGPvan could help with this

Fully dedicated pitch – almost like a vertical specific pitch

Why does it matter than your advocacy solution

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**Grasstops Advocacy vs. Grassroots Advocacy**

Both **grasstops** and **grassroots advocacy** aim to influence public policy and decision-making, but they differ in strategy, audience, and execution.

### **Grassroots Advocacy**

* **Definition:** A bottom-up approach that mobilizes large groups of everyday supporters to engage in advocacy efforts, such as signing petitions, contacting legislators, or attending rallies.
* **Who’s Involved?** The general public, volunteers, and supporters who may not have direct influence over policymakers.
* **Common Tactics:**
  + Mass email and phone campaigns to elected officials
  + Petitions and social media movements
  + Local protests, town hall participation, and rallies

### **Grasstops Advocacy**

* **Definition:** A more strategic, top-down advocacy approach that leverages influential community leaders, business executives, or individuals with established relationships with policymakers.
* **Who’s Involved?** High-profile supporters like corporate executives, board members, former government officials, academics, or major donors.
* **Common Tactics:**
  + Direct meetings with legislators and policymakers
  + Op-eds and media placements from respected industry leaders
  + Leveraging personal relationships to gain access and influence
  + Speaking engagements or private briefings with decision-makers