



# The Nonprofit Digital Marketing Maturity Assessment



Transform the way you engage stakeholders and drive efficiencies.

# Introduction

Nonprofit marketers using Salesforce achieve an average increase of 19% in Marketing ROI. Want to know how?

Adapting and utilizing digital tools enables organizations to automate processes, allowing you to spend your time more efficiently.

Nonprofit marketers are increasingly looking to create more personalized and connected digital experiences for stakeholders. However, sometimes knowing where to start can be a challenge.

Kick-start your journey to Success Now by evaluating your digital marketing maturity level with this interactive guide. You will be able to:

- 1 Identify gaps.**  
Uncover areas of your organization that have room for improvement.
- 2 Share results.**  
Record your scores, and use them as a way to bring teams together around common goals.
- 3 Create a framework.**  
Use this assessment as a framework to begin a conversation with key decision makers.
- 4 Improve experiences.**  
Make changes to deliver personalized, unified messages across channels at every stage of a stakeholder's journey with your organization.

# Strategy

This category represents how well your organization creates and measures stakeholder-centric strategies.

Select one answer on a scale from 1 (“Strongly disagree”) to 5 (“Strongly agree”) that best represents your organization.

1

2

3

4

5

Our mission statement clearly and accurately describes our current mission, the problem(s) we solve, and how we distinguish ourselves from similar organizations.

Our organization has a defined strategic and technical roadmap for successful digital transformation with set objectives from top line management, supported at all levels of the business.

We consistently engage our stakeholders across internal departments (marketing, programs, fundraising, service, strategic events, major gifts, education, etc.) in a unified manner, and our executives track success through stakeholder-centric metrics, such as customer satisfaction score (CSAT) or Net Promoter Score (NPS).

Our organization has and will continue to put aside appropriate funding, time, and resources to support the internal organizational transformation activities that are critical for ongoing success.

We have defined a shared plan for measurement and aligning departmental, channel, and individual goals with the broader organizational objectives.

Average  
total score

# Stakeholders

This category represents the five primary requirements to actively engage your stakeholders across all touchpoints.

Select one answer on a scale from 1 (“Strongly disagree”) to 5 (“Strongly agree”) that best represents your organization.

1

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We have robust target audiences and stakeholder profiles defined, based on a comprehensive set of data sources (giving, volunteering, membership, advocacy, behavioral, profile, contextual, etc.)

All messaging is dynamically tailored to the individual based on lifecycle stage, interests, and engagement data across every possible touchpoint.

We create personalized customer journeys to build long-term stakeholder relationships in digital channels across marketing, service centres, fundraising, programs, memberships and more.

We take a holistic approach to analyzing and predicting interactions across multiple channels, have achieved a 360-degree view of the customer, and use analytics to inform the stakeholder journey.

We have clear guidelines for optimal single- and cross-channel frequency and sequencing of communications across email, social, and mobile. We maximize relevance of content through continual optimization of the stakeholder contact strategy.

Average  
total score

# Technology

This category represents how technology helps your organization engage with your stakeholders to meet your mission.

Select one answer on a scale from 1 (“Strongly disagree”) to 5 (“Strongly agree”) that best represents your organization.

1

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IT is successful at enabling the business to quickly and smoothly adapt to dynamic, complex business needs.

Our organization is willing to adopt new, best-in-class, flexible solutions for diverse sets of needs across the organization that have proven and trusted security measures.

Our organization has successfully defined and leveraged a single source of truth which gives us a 360 view of all our stakeholders that engage with our nonprofit.

Stakeholder and organizational impact data are easily leveraged to inform engagement strategies, formulate goals, and even predict stakeholder needs.

We leverage technologies to automate repeatable and complex tasks, allowing for increased operational flexibility to meet team and organizational goals.

Average  
total score

# Operations

This category represents the five essential requirements to operationalize and scale engagement across the stakeholder journey.

Select one answer on a scale from 1 (“Strongly disagree”) to 5 (“Strongly agree”) that best represents your organization.

1

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Our internal teams and partner agencies have the right expertise and proficiency to capably ideate and transform our stakeholder engagement strategy across all digital channels.

Our organization demonstrates a high degree of accountability and individual ownership as shown through transparent guidelines, proper incentives, and rewarding employee success.

Our organization is structured in a way that facilitates team and cross-functional collaboration, which enables effective communication and decision-making.

We have clearly documented both scalable and repeatable business processes for activating consumer data into manual and automated points of communication.

Average  
total score

# Digital Maturity

In these two final questions, please select one answer that best represents your organization's current state for both channel and engagement maturity. These questions will help you start a conversation within your organization about your overall digital maturity.

## How would you best classify the way your organization coordinates digital messaging across channels today?

We are engaging with our stakeholders in a siloed, uncoordinated fashion.

Only one of our key digital channels is coordinated across the stakeholder lifecycle.

More than one but not all digital channels are coordinated across the same stakeholder lifecycle – but not necessarily as a unified and synchronized journey.

All of our digital channels are coordinated across stakeholder lifecycle stages and across channels.

The stakeholder experience is fully connected across fundraising, programs, memberships etc, service/support, and marketing initiatives.

## How would you best classify your organization's ability to scale personalized engagement?

Our current capabilities enable our organization to reach stakeholders by mail or in person only.

Our current capabilities enable our organization to reach stakeholders by mail, in person or digitally.

We have the ability to segment stakeholders based on a variety of attributes, such as their online behaviors, giving history, volunteer engagement, program participation or membership history, but only in an ad-hoc manner.

We have pre-segmented our stakeholders based upon their lifecycle stage and constantly engage with them according to those stages with planned and triggered communications, yet we lack integration with many of our IT and data systems.

A variety of our touchpoints are tailored for each individual to create extremely personalized engagements regardless of what channel or form of integration they have with the organization.

All stakeholder touchpoints are fully personalized and capable of real-time engagement regardless of where stakeholders are in their unique journey with our organization.

# Calculating your score.

**Calculate your organization's digital marketing maturity score by averaging the sum of the category totals.**

So, what is your final score?

## 0–2.49 Aspirational

It sounds like you are at the beginning of your journey to digital marketing success. Nice job on getting started, keep up the great work.

Check out [Trailhead](#) to continue learning.

## 2.5–3.99 Experienced

You are blazing those marketing trails! Good work on driving more efficiencies and engaging your stakeholders. Check out our [resource hub](#) for more helpful content.

## 4+ Expert

Look at you, digital marketing trailblazer! Congratulations on reaching expert level. Remember, digital marketing transformation is a journey, not a destination. Want some more inspiration? Check out our [customer stories](#).

You can now see which dimensions require the most attention. For a dimension with a low score, go back and look at the categories within that dimension. Was there one that brought down the entire average, or were all scores the same? Similarly, analyze your top-performing dimensions to see what areas still need attention or improvement. This information can guide your future efforts to help you plan and evolve your engagement strategy.

When evaluating your digital maturity, share these answers with your team to see if they have different opinions or agree. Your answers can be used to start a conversation about gaps in your current state of digital maturity.

You're on your way to knowing your stakeholders, personalizing each interaction based on their behavior, and engaging with them on their channel of preference. Now that you have a greater understanding of your organization's strengths and weaknesses in the four dimensions of stakeholder engagement.

Want to speak to a Salesforce representative about your digital transformational journey? [Get in touch today.](#)



