wire media

Prove Your Impact

Digital Annual Report Prep Guide

for nonprofit fundraisers
& communications leaders.

Introduction

About This Guide

A digital annual report is a great tool to use when talking to donors, prospects, and foundations, and whenever you want to prove your impact to your audience. Traditionally these have been created in the form of printed annual reports and mailed to important members of the audience.

Today we can take advantage of digital tools and create a truly compelling story of impact that lives on your website. This allows you to share it widely, and to make it interactive with immediate calls to action for support or donations.

This guide will explain what it means to prove your impact and why you should create a digital annual report. It will take you through the steps needed, and some of the decisions you'll have to make, to prepare you to do so.

What is a Digital Annual Report?

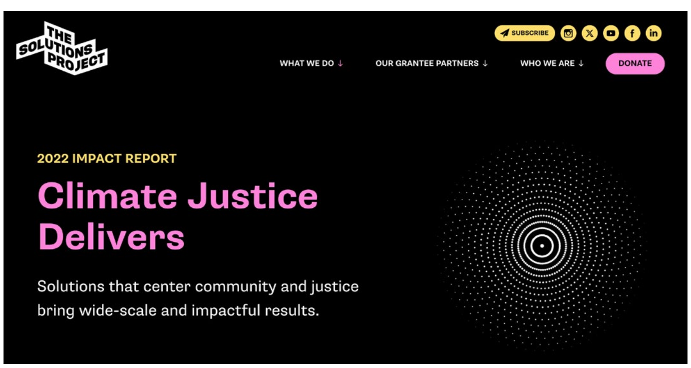
Definition

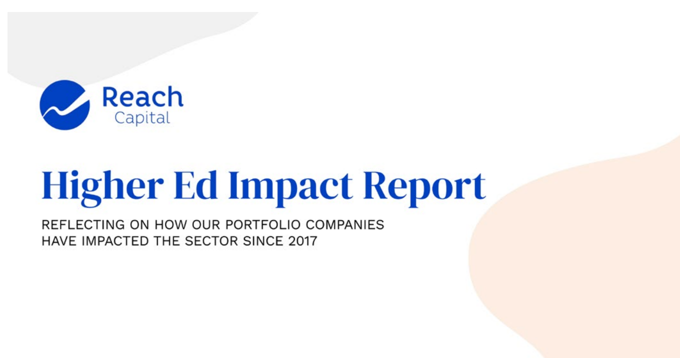
A digital annual report is a way to use visual storytelling and data design to tell the story of your impact at-a-glance, and in an emotionally compelling manner. Its primary power lies in quickly conveying critical and relevant information to people making a decision about whether or not to start or continue to support your organization.

EXAMPLES

These are some examples of digital annual reports we've written, designed, and built. Wire Media provided content strategy, copywriting, UX design, visual design, and programming.

Click to view them.





Why Should You Have a Digital Annual Report?

Benefits

Traditional annual reports are long. There is a lot of text to read and these days people don't want to read. A digital annual report is easy to scan for the most important or relevant information. It's easy to share. It's interactive. It's engaging.

FACTS

Our brains process **visual content** 60,000x faster than text.

Source: Visual Teaching Alliance

Content that includes **images** is remembered better than text-based content.

Source: Hubspot

Social media posts with **infographics** are 3x more likely to be liked & shared than any other type of content.

Source: Hubspot

Assess Your Readiness

Getting Buy-in

Getting buy-in from all the stakeholders in your organization is a critical first step in getting to a completed digital annual report.

Steps to get buy-in:

1	Identify roadblocks. Who at your organization might not be on board?
2	Note concerns. What concerns do these people have?
3	Determine how to respond. Consider their goals and how a digital annual report can support them. Share some of the statistics on the preceding page.
4	Set a time and date to talk to each person about their objections and your reasons.
5	Get a verbal agreement to proceed and consider adding it to the planning agenda for your next budget meeting.

Use the worksheet on the next page to keep track of your progress.

PRO TIP

Be clear on who the final decision-maker is.

Assess Your Readiness (continued)

WORKSHEET: **GETTING BUY-IN**

1 NAME		
2 THEIR CONCERNS	3 YOUR RESPONSE	
4 MEETING DATE & TIME		5 AGREED?

1 NAME		
2 THEIR CONCERNS	3 YOUR RESPONSE	
4 MEETING DATE & TIME		5 AGREED?

1 NAME		
2 THEIR CONCERNS	3 YOUR RESPONSE	
4 MEETING DATE & TIME		5 AGREED?

1 NAME		
2 THEIR CONCERNS	3 YOUR RESPONSE	
4 MEETING DATE & TIME		5 AGREED?

Plan Resources

Once you have buy-in, it's time to consider what sort of in-house resources and budget you have available. This information will ultimately drive the type of digital annual report you can create, and how technically advanced it is.

Take note of the following:

1	Staff resources: How many people will have time for this project? How much time? What role will they play? Do they have the right experience?
2	Data and story resources: Do you have metrics, a database, documentation, images, or other content assets? If so, are they well organized and easily accessible or will it need some effort?
3	Financial resources: What level of budget do you have available to hire professionals? Can you at least hire an experienced copywriter? What about a visual storytelling pro? Or do you need to rely on prebuilt templates?

PRO TIP

Be realistic about internal staff's available time and expertise.

Assess Your Readiness (continued)

WORKSHEET: **RESOURCE PLANNING**		
STAFF RESOURCES		
NAME:	AVAILABILITY:	ROLE/EXPERIENCE:

DATA RESOURCES		
FORMAT:	LOCATION:	CONDITION:

FINANCIAL RESOURCES	
SOURCE:	AMOUNT:

Make Preparations

Plan Your Timeline

Your specific timeline will vary depending on your available resources, the condition of your assets, and other factors. The following is a typical set of milestones for a digital annual report. When planning your report timeline it often works best to start with your launch date and work backwards.

Phase 1: Discovery

» Asset Delivery

» Stakeholder Personas

» Audience Personas

Phase 2: Strategy

» Goals

» Priorities

» Marketing Strategy

» Data Analysis

» High Level Story Outline

» Assess Content Needs

» Content Creation / Copywriting

Phase 3: Design

» Wireframes

» UI/UX

» Design

Phase 4: Build

» Backend Development

» Frontend Development

» Content Entry

» Testing & QA

Phase 5: Launch & Promote

» Launch

» Implement Marketing Campaign

» Run User Tests & Analytics

» Iterate & Update

PRO TIP

Data analysis and content creation will take the most time to get right.

Make Preparations (continued)

WORKSHEET: **TIMELINE PLANNING**

MILESTONE:	DUE DATE:	NOTES:

Identify Stakeholder Goals

Set goals:

1	**List stakeholders:** Write down the name of each person in your organization who would have a good reason to share the Report with others. Don't forget your Board!
2	**List each person's goals for the project:** For example, your Development Director may want to be sure that it's clear what overall results were achieved with large donation amounts while the Communications Director might need the Report to share how individual people benefitted from your work.
3	**Identify potential conflicts between goals:** If you end up with too many goals, or competing goals, it's important to prioritize them. Sometimes it's possible to rephrase a goal to get it to be more similar to another goal, thus reducing the overall number. Another way to do this is to review your larger strategic plan and decide how the Report can best support it.

PRO TIP

Connect goals to your marketing or strategic plan.

Identify Audience Goals

It's important to understand what your audience members want so you can give them what they expect to see.

You can do a survey, make some phone calls, or conduct interviews. Creating personas is also a great way to start to gain a strong understanding of audience needs and goals. Whatever you do, take some time to be sure you understand what they want.

If you want them to make a new or recurring donation, what do they need to make a "yes" decision on that? Or if you want them to sign up as a volunteer, what does that group of people need to know?

PRO TIP

Talking to just five people in your audience can yield important insights.

Audience goals:

1	**List each persona (audience type):** Often this looks like: major donors, volunteers, recurring donors, media, etc
2	**Identify the goals of each main audience:** Think about what they want once they make the decision to look at your digital annual report. If possible, conduct some formal research rather than just making your best guess. The people in your audience may surprise you.
3	**Prioritize their goals:** This should be based on who the Report is really most for.

Make Preparations (continued)

WORKSHEET: PEOPLE & GOALS

STAKEHOLDERS

NAME:	GOAL:	PRIORITY LEVEL:

AUDIENCES

PERSONA / AUDIENCE TYPE:	GOAL:	PRIORITY LEVEL:

CALLS TO ACTION

Decide on Metrics of Success

If you don't measure it, you can't know if it's working or not. Figure out what to measure based on your goals and call-to-action.

Ideally you'll test several key metrics on a regular schedule and then make changes to the Report to try to improve your results over time.

Some things you can track (there are many more):

1	**Page views:** Ideally you want to see this number grow over time and also to see a higher and higher average number of views per day or per month.
2	**Scroll-to-bottom:** With heatmaps tools (like Hotjar) you can see if people are actually scrolling through everything or not. If not, consider changing your report design or content to try to increase the number.
3	**Time-on-page:** Are people spending enough time to absorb all of the information?
4	**Shares:** Provide a link to share the report on social media and measure clicks.
5	**CTA conversions:** If you're not getting the conversion rate you hoped for, there's many things to consider. A few are: content (is your text compelling enough?), design (are people able to find the button to click on?), continuity (is there consistency between what people saw when they decided to click to visit the Report and what they see upon arrival?).

PRO TIP

Track what's possible and useful towards reaching goals.

Make Preparations (continued)

WORKSHEET: **METRICS TO TRACK**		
METRICS		
METRIC:	METHOD:	PRIORITY LEVEL:

Some Common Metrics & Tracking Tools

Google Analytics:

Very robust, lets you track all kinds of data. It's free, but can be overwhelming if you don't have certification.

Google Content Experiments:

Part of Google Analytics (also free) you can compare versions of your page to see which gets better results.

Optimize.ly:

Starts at $79/month. Lets you change small parts of your site to test if the old or new version works best.

Hotjar:

A heat mapping tool (free and paid versions) that lets you see how people move around your web pages.

Kissmetrics:

On a par with Google Analytics in terms of complexity plus tons of useful resources. Starts at $500/mo.

Chart Beat:

Shows you in real time what people are doing on your site. Starts at about $10/month.

Organize Your Assets

Content is the part of the digital annual report that takes the longest. If you have your assets organized and ready to go, the entire process will be much smoother.

Suggested assets to organize (you may have others):

1	**Branding Guide:** If you have one – have it ready to give to whoever will be creating the Report. It's important that your Report accurately reflect your brand. If you don't have one – gather the assets you already have that best represent your brand and have the people creating the Report use those as a general guide for fonts and colors.
2	**Data:** Do you have database information? Critical numbers about outcomes? Tallies of results? Share what you have with the writers of your Report and work with them to pick out data points that are compelling, relevant, related to your goals, and most importantly, that can prove your impact.
3	**Key results:** Focus on data that demonstrates your are getting significant results from your efforts. If you don't have hard numbers (start collecting them) — you can use anecdotes instead. If you need to gather anecdotes from staff or clients, start early, provide them with a form or outline to fill in, and make it as easy for them as possible.

PRO TIP

Assign one person to be the "content wrangler" and know where everything is.

Make Preparations (continued)

4	**Photos/Videos:** Don't expect the report designer to pick through your thousands of unorganized photos, without billing you for all that time. Organize them — by event, by type (headshots versus group photos versus landscape images, etc), by issue, or however makes sense to you. But get them organized and located where your designer can access them. Dropbox is a common choice.
5	**Quotes:** if you think you may want to use quotes from individuals, get started early. We recommend writing what you want them to say and asking them to approve or edit it, and to give permission to use it. Making it easy helps ensure success.
6	**Copy:** Many organizations have talented copywriters on staff. Those people might be fundraising staff, used to writing long-form letters. Others might be marketing staff, more used to writing ad copy and social media posts. Consider working with a copywriter with a track record for storytelling on the web. Telling a compelling story visually requires the ability to parse out key words and phrases, to organize the information in a way that the design can make it visually "scannable," and to eliminate jargon and marketing language in favor of plain English written in a way that works well on the web.

PRO TIP

Create a plan to regularly collect, store, and organize quality photos, videos, quotes, and other content.

Make Preparations (continued)

WORKSHEET: **ASSET ORGANIZATION**		
ASSET LOCATOR LIST		
ASSETS:	LOCATION:	NOTES:
Brand guide / materials		
Data		
Key Results		
Photos		
Video		
Quotes		
Copy		

DIY or Hire an Agency?

Decide Who Will Create Your Report

Organizational budget will be a clear deciding factor for many organizations about whether or not they do it themselves. For those who have some budget to work with, you'll want to decide if this is the right way to spend your it. If you can't quite do it all but can't afford an agency, consider hiring freelancers to handle parts of the project (just design, or just copywriting, etc).

Some things to consider:

1	**Marketing budget:** If your gross is under $1 million/year it's likely you won't have the budget to hire an agency. If you're between $1M - $5M it may depend on your tendency to spend money on marketing. Above $5M there's usually some room for marketing spend.
2	**Staff skills:** However you do this there must be some staff involvement. If you plan to go DIY, seriously think about who will plan, create, and build the Report. Do they have the right skills? If hiring an agency, figure out who on your team will own the project. Do they have the clout to get other staff involved as needed and to get access to necessary resources?
3	**Timing:** Even if you have people with the ability to do some or all of what's needed, it's possible they don't have the time. Make sure that anyone involved with the project is able to block out enough time to handle their role.

PRO TIP

Make sure people have the right skills for the job.

DIY or Hire an Agency? (continued)

WORKSHEET: **DIY OR AGENCY SELECTION**			
BUDGET FOR THIS PROJECT:			
$			
PEOPLE ON STAFF:			
SKILL:	NAME:	SKILL LEVEL:	TIME AVAILABLE:
Strategy			
Asset collection			
Data analysis			
Copywriting for the web / storytelling			
Data design / visualization / infographics			
Website design			
User experience design			
Backend web development / programming			
Frontend web development			
Metrics / user testing			
Marketing strategy			
Project management			

DIY or Hire an Agency? (continued)

WORKSHEET: **MASTER CHECKLIST**

Steps to Prep for your Annual Report

TASK:	DUE DATE:	ASSIGNED TO:	DONE?
Get buy-in from budget authority.			
Plan your resources (staff, data, financial).			
Plan your timeline.			
Identify stakeholder goals for the project and call(s)-to-action (with conflicts resolved).			
Identify audience goals (with conflicts resolved, and thinking about how to align audience goals with stakeholder goals).			
Identify metrics of success.			
Collect and organize all of your assets (consider curating large collections of images or other content)			
Decide who will create your report (in-house, freelancers, agency).			
If hiring an agency, write a Request for Qualifications (RFQ) to get to a short list of qualified firms. Then ask the top 3 to submit a proposal in response to your RFP.			
Pick a start date and a launch date.			

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