

Inspire. Connect. Grow.
2019 | CHICAGO, IL

#2019Raise

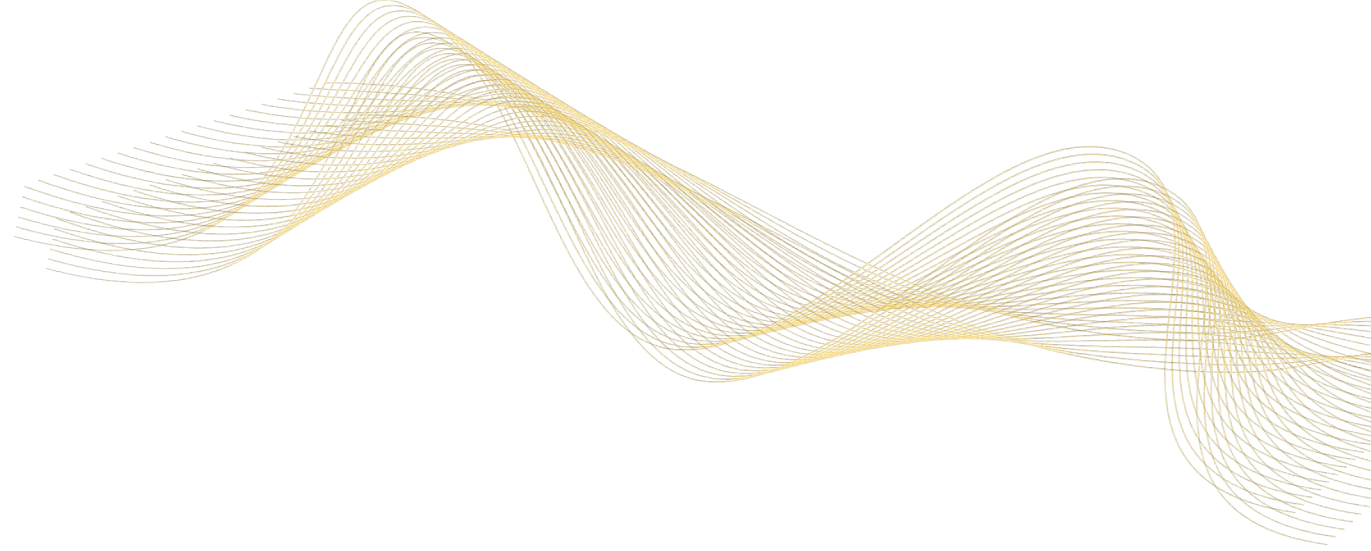
Raise 2020

WE'RE GOING VIRTUAL

2 Days of Online Learning & Networking

SEPTEMBER 14-15, 2020

Session
Sponsor



virtuous

Delivering amazing donor experiences that grow giving.

www.virtuouscrm.com

Raise
2020

WELCOME



Building Systems That Create Deep Donor Relationships at Scale

Gabe Cooper

Founder/CEO at Virtuous

<https://virtuouscrm.com>





We are the responsive nonprofit's growth partner.

- An integrated CRM, marketing automation, and giving **platform** built by fundraisers for fundraisers.
- A modern fundraising **playbook** designed to build lasting relationships with today's donor.
- Hands-on support and on-going insights delivered by real **people** who deeply care about your success.



Learn more at VirtuousCRM.com



The Responsive Nonprofit's Growth Platform



NONPROFIT CRM

Turn data into deeper donor relationships



SIGNALS

Data-driven donor insights



AUTOMATION

Multi-channel connections at scale



MARKETING

Email, mail & campaign tools

Thousands of Leading Fundraisers Trust Virtuous







GIVING IS DEEPLY PERSONAL

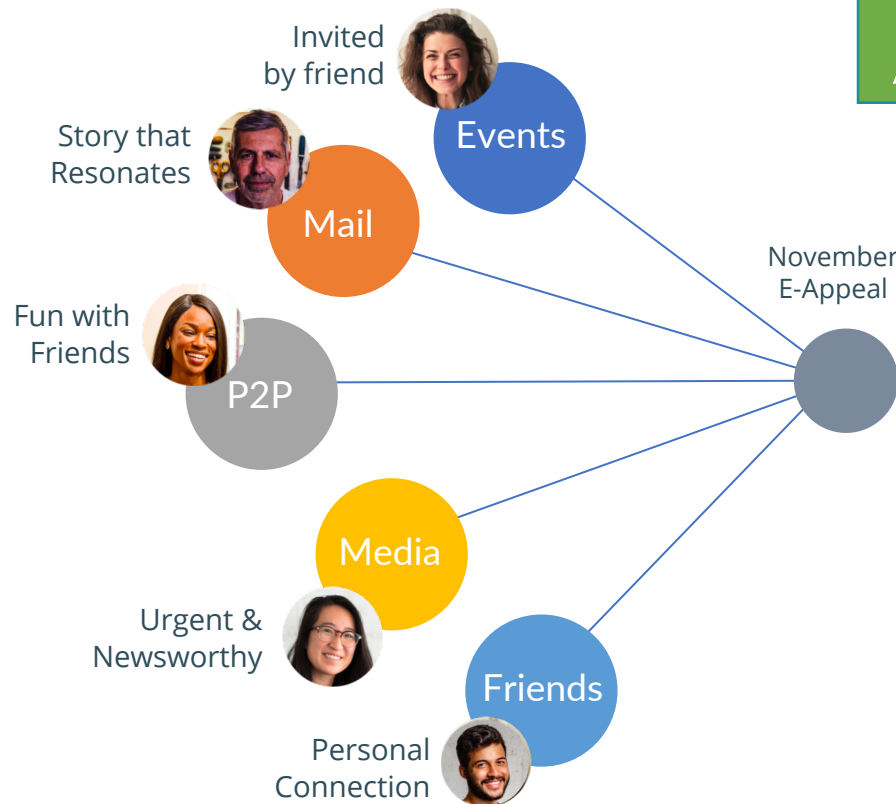
The Problem

Most nonprofits are handcuffed to traditional fundraising systems that are largely impersonal.

Traditional Fundraising is Largely Impersonal

Donor/Prospect Acquisition

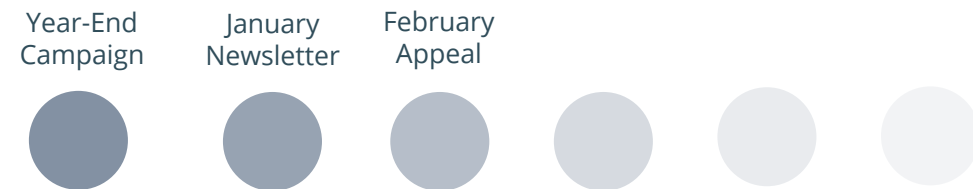
Personal. Varied. Based on Donor Timing



76%
Attrition

Retention & Cultivation

Disconnected from Intent. Impersonal. Nonprofit Timing.



Impersonal Tactics

A Massive Disconnect

Most nonprofits rely on legacy strategies for donor outreach.

One-to-Many

Spray and pray email & direct mail. Donors are just numbers.

One Way

Communication is one way to the donor. Based on nonprofit timeline, not donor behavior.

THE RESULT OF THIS DISCONNECT

A Growing Generosity Crisis



The Numbers

≈50%

Turn over in donors every year

≈25%

Drop in mid/low donors last decade

Why Donors Opt Out

Inappropriate asks & impersonal messages

Lacking acknowledgement & limited transparency

Poor & unhelpful communication

“Every system is perfectly designed to get the results it gets.”

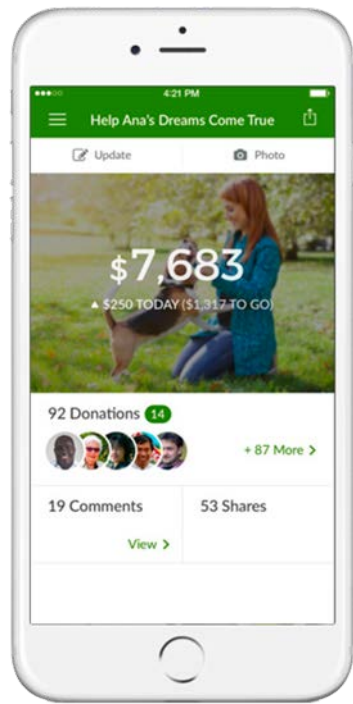


— **Paul Batalden**

MD, Researcher, Healthcare

This problem is compounded as the world you fundraise in has *shifted*.





Shift from mass marketing to personal, dynamic experiences

Tailored to You

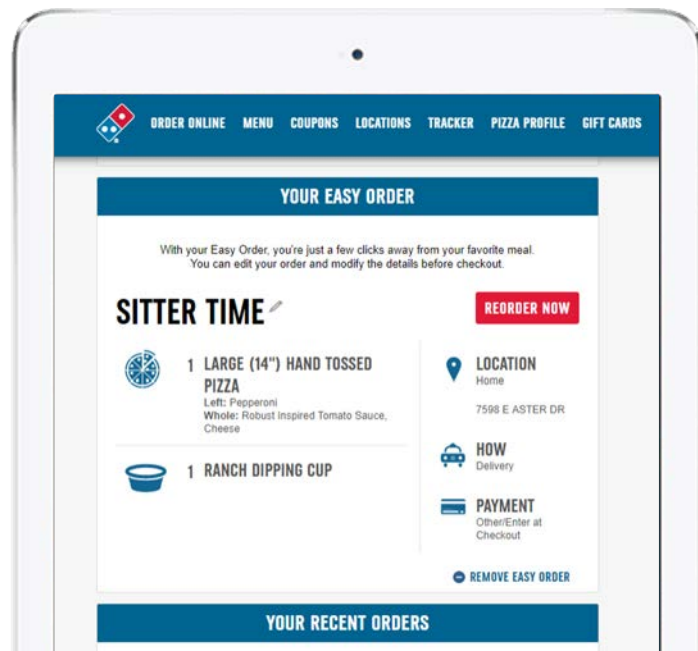
Curated content and experiences based on your interests.

Based on Your Community

Personalized and connected to your network and activity.

Two-Way, Behavior Driven

Triggered based on my response to content, data signals, etc.





Personalization Everywhere



STITCH FIX



+



A New Reality

Today's donor expects a personal connection to causes they care about most.

A microscopic view of several COVID-19 virus particles. The particles are spherical and covered in a dense layer of red, crown-like spikes. The background is a dark, reddish-brown color with a fine, granular texture.

COVID-19

“Some organizations will thrive from this increased chaos, some will be unprepared, and some will merely fight it and lose.”



— **Seth Godin**

Marketer, Innovator, Author

Key Insight

The **fundraising systems** that drive most nonprofits were designed for a world that no longer exists.



Two important questions:

Two important questions:

What can you do to **close the gap**?

Two important questions:

What can you do to **close the gap**?

How can overcome the **inertia**?



“We have to devise means of making known the facts in such a way as to touch the imagination of the world. The world is not ungenerous, but unimaginative and very busy.”



— **Eglantyne Jebb**
Founder of Save the
Children

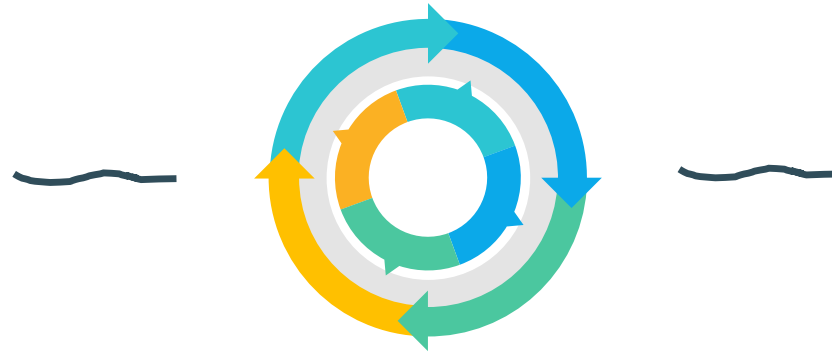
The First Principles of Fundraising

Connecting supporters with your story through systems



Supporters

Donors, Stakeholders,
Volunteers, Board, Staff



Systems

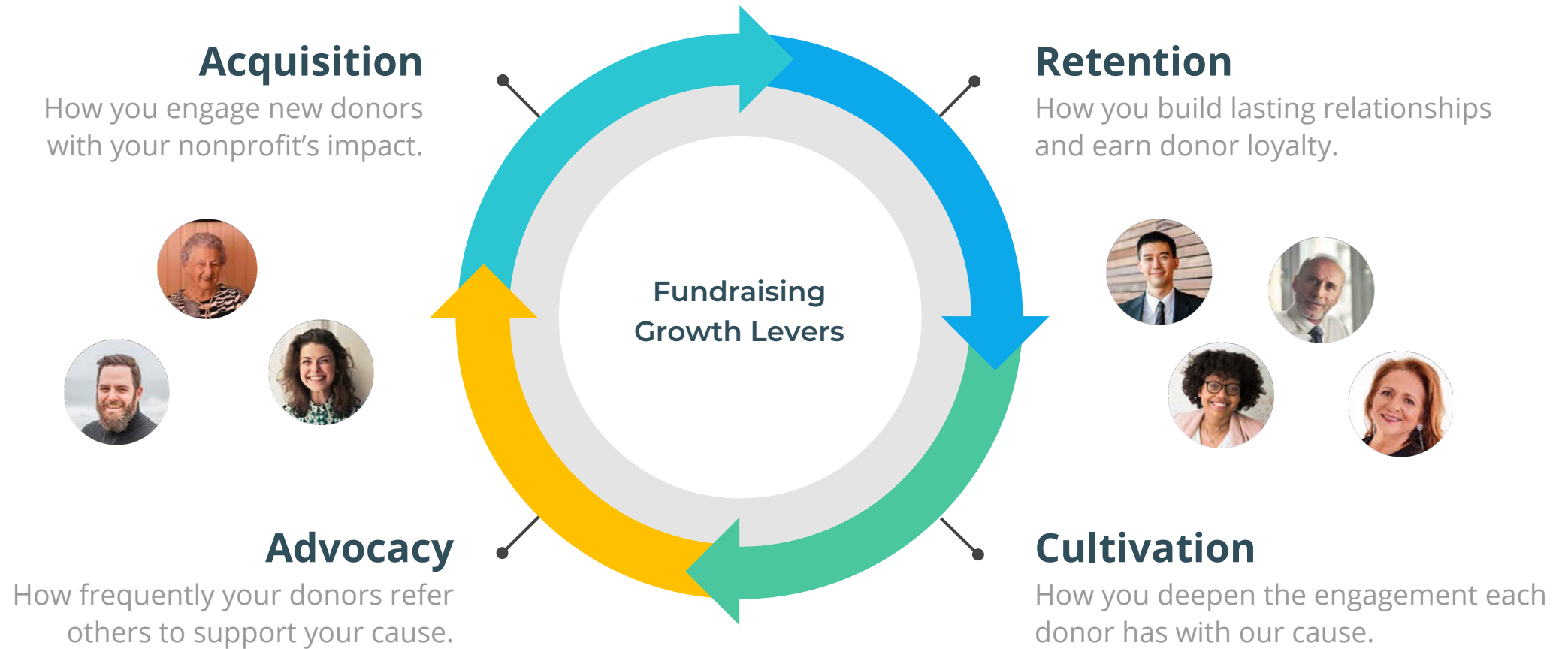
Campaigns, Processes, Habits,
Metrics, Communications,
Platforms



Story

Mission, Impact, Purpose,
Outcomes, Beneficiaries

The Fundraising Growth Model



How are nonprofits accelerating their growth model and **closing the gap** with modern donor?

Closing the Gap Requires Adopting a **Responsive** Mindset

Commit to **responding** to every donor in a personal way.
In other words, treat ALL of your donors like major donors.

Modern Tech + Responsive Tactics = Personalized Engagement for Every Donor



A DONOR-CENTRIC APPROACH

The Responsive Framework

Listen

Ask questions. Find out why donors given. Identify key signals.

1

Connect

Connect personally in real-time. Automate emails, tasks, & segmentation.

2

Repeat

Test. Find out what what works. Rinse and repeat.

4

Suggest

Suggest the right next step based on engagement, intent and capacity

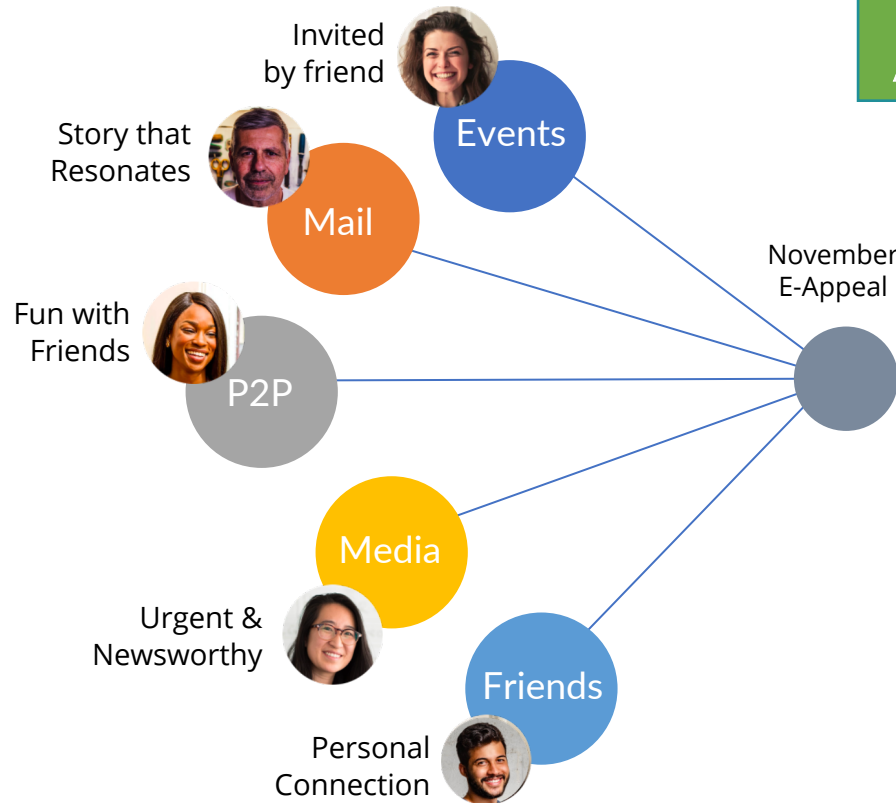
3



Remember this approach?

Donor/Prospect Acquisition

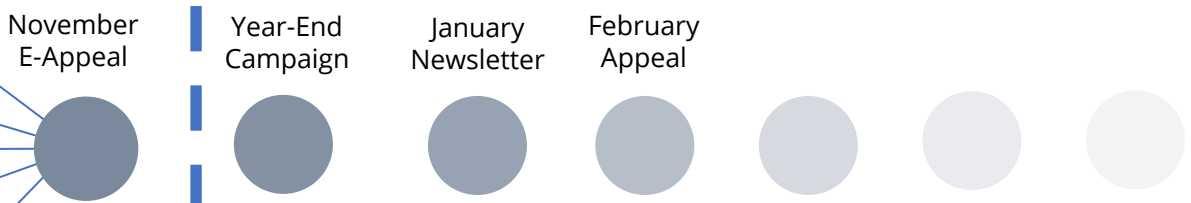
Personal. Based on Donor Timing



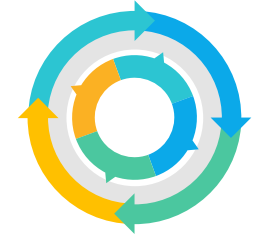
76% Attrition

Retention & Cultivation

Disconnected from Intent. Nonprofit Timing.



Imagine for a moment...



Meet Lisa

Invited to Event by Friend



1 hr



TY email with 2 question survey on Lisa's interest

1 day



Thank you call from friend

2 days



SMS from Program Team based on interests

Lisa Visits Site



1 day



Email w/ donation ask based on page Lisa visited

Lisa Gives!



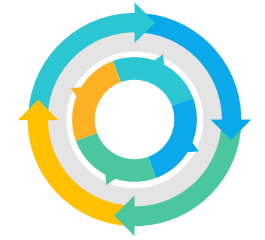
15 days



Postcard from Program closing the loop on impact

Based on donor timing & intent. Hyper-personal. Multi-channel

What if?



Tim



New Donor Journey

First gift to water campaign



Ronda



Online Gift Recovery

Abandons donation page



Lynn



Lapsed Donor Journey

Hasn't given in 13 months



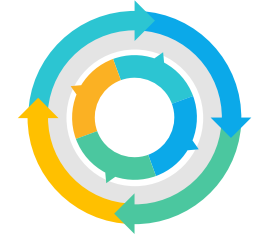
James



Malaria Info Series

Clicks to email and downloads PDF

Responsive, Dynamic Campaigns

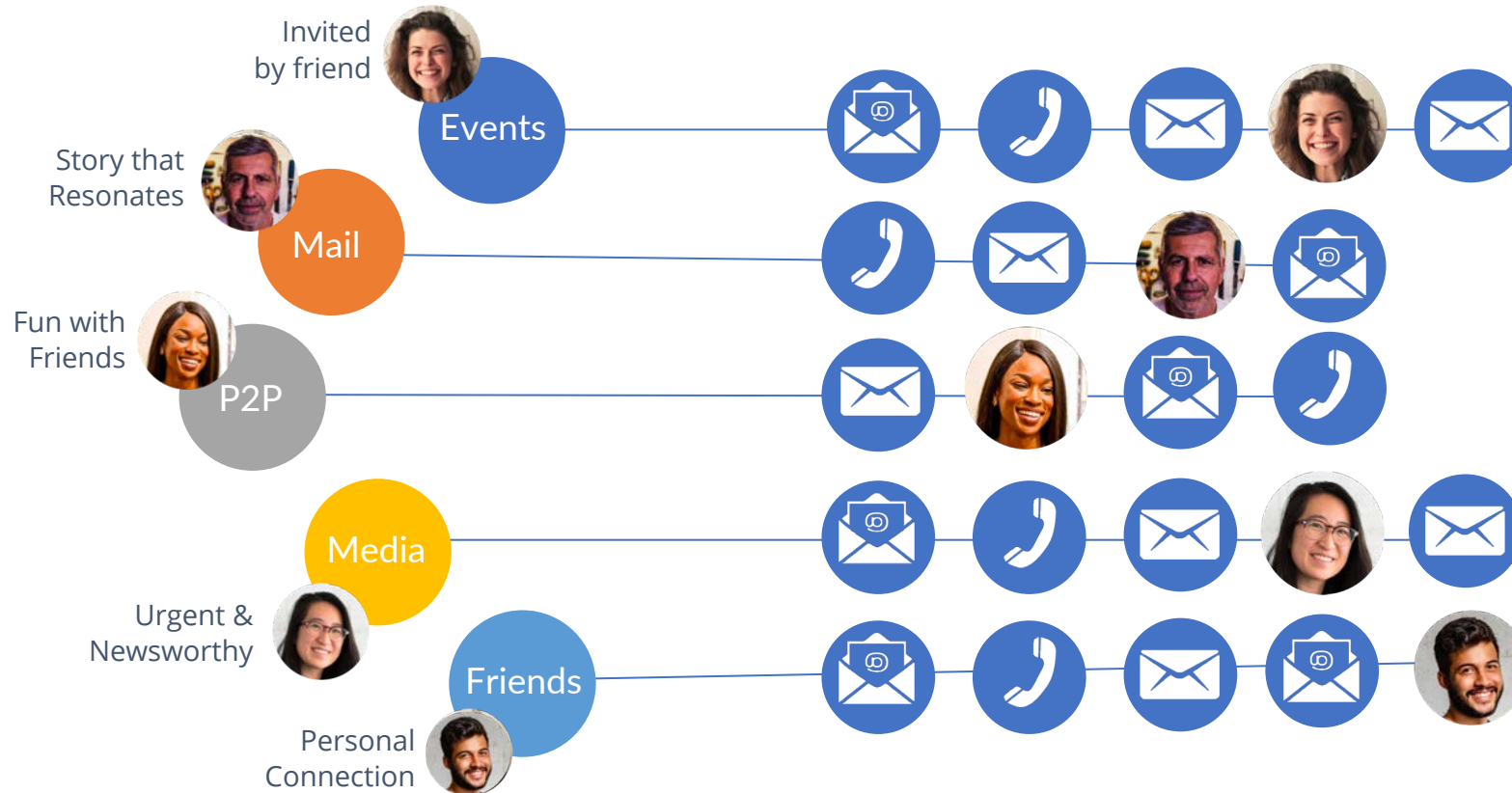


Donor/Prospect Acquisition

Personal. Based on Donor Timing

Retention & Cultivation

Connected to Intent. Driven by Donor Behavior.



↑
Retention

↑
Avg Gift

↑
Engagemen

A DONOR-CENTRIC APPROACH

The Responsive Framework

Listen

Ask questions. Find out why donors given. Identify key signals.

1

Connect

Connect personally in real-time. Automate emails, tasks, & segmentation.

2

Repeat

Test. Find out what what works. Rinse and repeat.

4

Suggest

Suggest the right next step based on engagement, intent and capacity

3



A DONOR-CENTRIC APPROACH

The Responsive Framework

Listen

Ask questions. Find out why donors give. Identify key signals.



Donor Personas

Tap data signals to create donor identities, and hyper-segmentation to personalize messaging and engagement opportunities.

Surveys & Third-Party Data

Collect first-party data from donors, and enhance donor profiles with social, wealth, relationship, and geolocation data.

Digital Behavior Tracking

Integrate what you know about a donor with how they engage with your nonprofit's emails and website.

What Are You Listening For?

Three types of donors signals you should listen for

Involvement

How they engage

Interest

What they engage with

Intent

Why they engage



Emma

Active donor ~4 years
LTD Giving > \$5k
Volunteers often

Gives monthly to
women support programs

Volunteered to be a mentor
for young girls

Said in a survey that she
gives because of she saw
first-hand the value of
mentorship.



Luke

First-time donor
Attended a virtual event
Gave \$500 online

Requested more info on
child advocacy programs

Viewed child adoption
articles on our website

Visited the website again
after being disengaged
for four (4) months.

POLL QUESTION

Do you use personas to segment and personalize communications?

- Not yet, but we'd like to.
- Yes, but they're limited to interest and involvement.
- Yes, we've created dynamic personas based on intent, interest, and involvement.

Raise
2020



Example

Donor Personas & Personalized Messaging



Erika // New Mother



Cheryl // Former Teacher



Scott // Pastor



Suzie // Mother



Abby // College Student



Jay // Business Owner

A DONOR-CENTRIC APPROACH

The Responsive Framework



Connect

Connect personally in real-time. Automate emails, tasks, & segmentation.

Marketing Automation!

Create dynamic campaigns that send relevant communication to donors based on what they care about most at key milestones in their journey.

Content Marketing

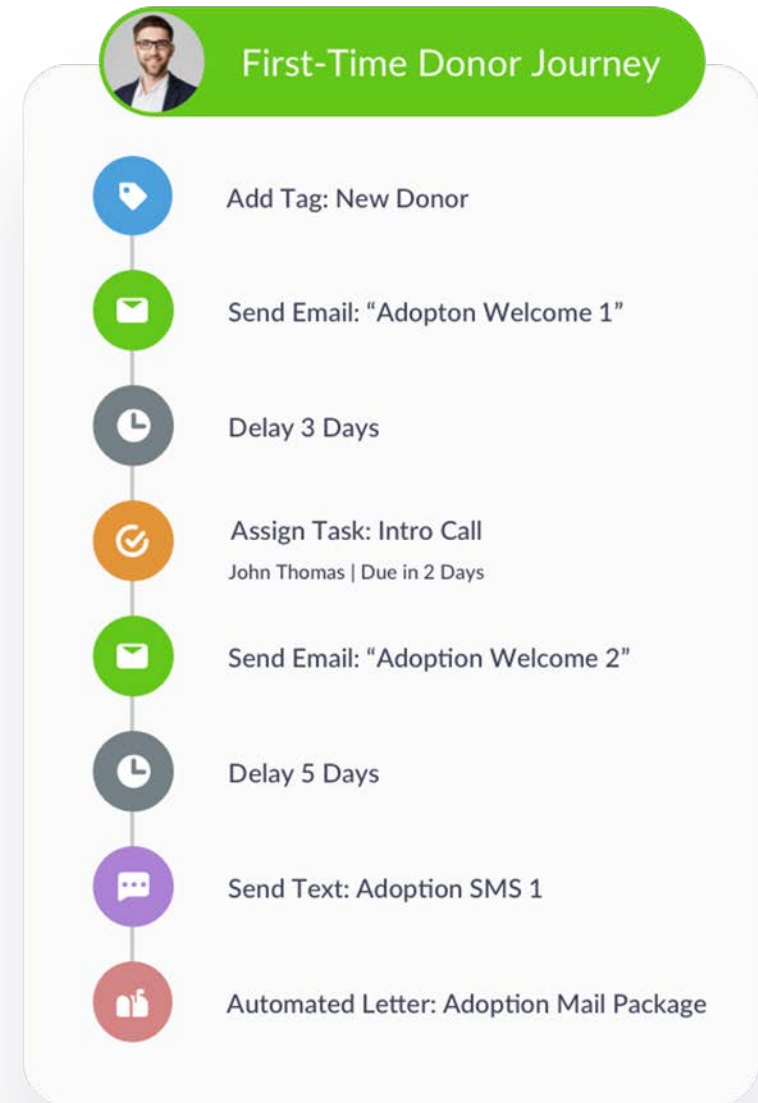
Drive deeper connection with donors by crafting relevant and compelling stories, informational PDFs, videos, experiences and more.

Multi-Channel

Tell a single story across all channels (mail, web, email, social, phone) to foster genuine conversations with your donors.

Example

Automated New Donor Onboarding Workflow



POLL QUESTION

Do you have an automated new donor welcome series?

- Nope. But, we'd like to.
- Yes. However, it's not personalized ...
- Yup, it's brilliant, and helps drive retention!

Raise
2020

Example

Celebrating Donor Giving Milestones




























LTD GIVING > 1K



Query: Giving Milestones - LTD > 1k

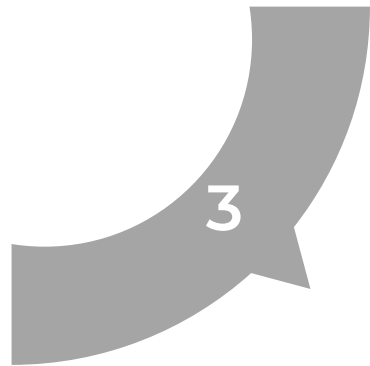
CONTACTS **344**

ACTIONS **14**

-  Task: Development Rep follow-up call
David Cady | Due in 5 days  
-  [Send 'Life-to-Date Giving \\$1,000 \(LTD Giving Milestone...](#)  
-  Add Tag: Major Donor  
-  Delay 2 days  
-  [Send Letter 'Welcome Letter'](#)  
-  Task: Director of Development Thank You Handwritten ...
David Cady | Due in 5 days  
-  Delay 3 days  
-  [Send Letter 'Thank You Letter'](#)  
-  Follow: David Cady  

A DONOR-CENTRIC APPROACH

The Responsive Framework



Suggest

Suggest the right next step based on engagement, intent and capacity

Smart Giving Options

Using donor signals you can present smart suggested gift amounts to each donor increasing response rates. Right ask, right person, right time!

Donor Journey Mapping

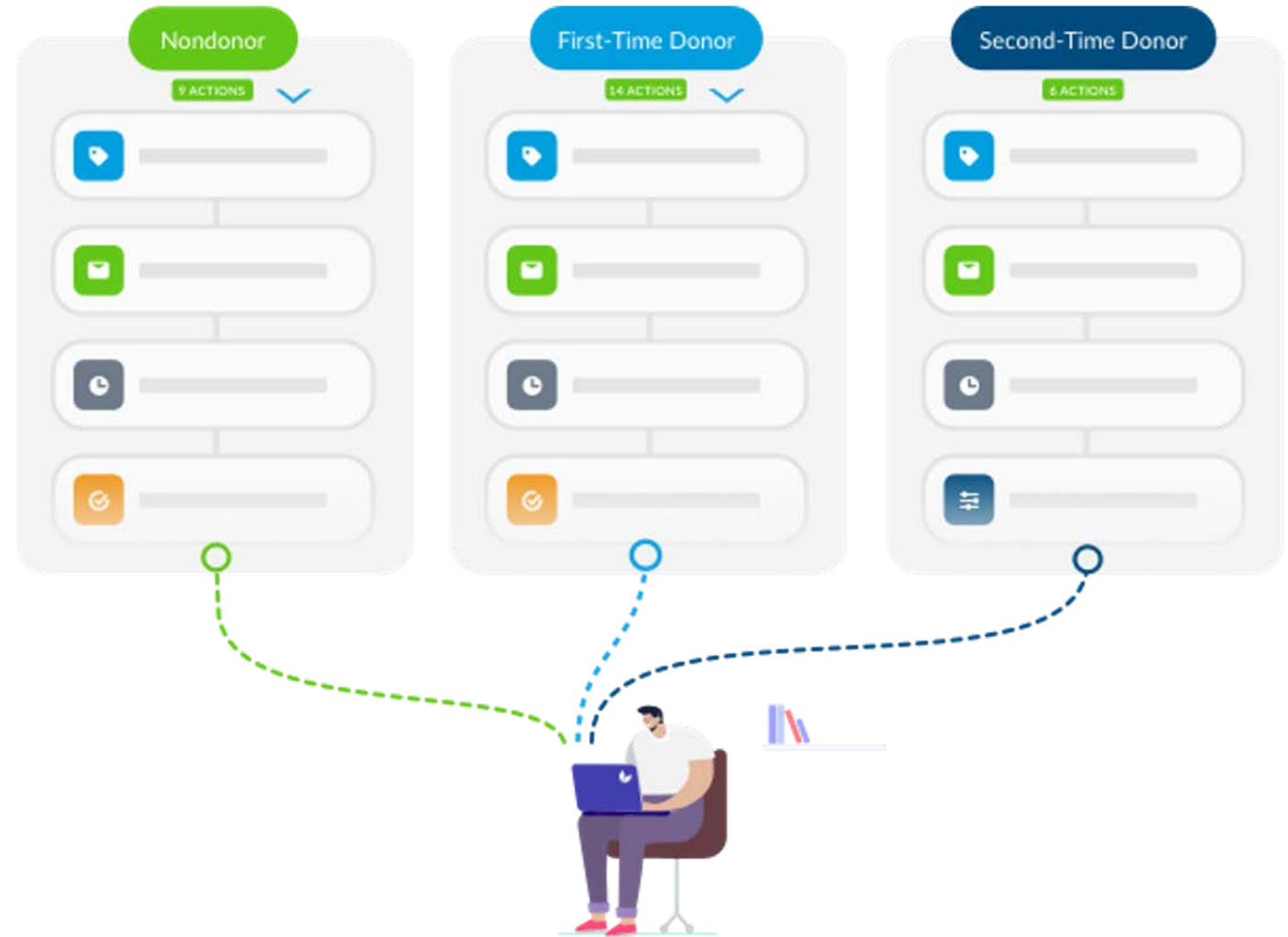
Each donor's journey is unique. Mapping these journeys let you identify key milestones for engagement.

Non-Financial Asks

Invite donors to give more than money. Create opportunities for donors to give their time, influence, acumem.

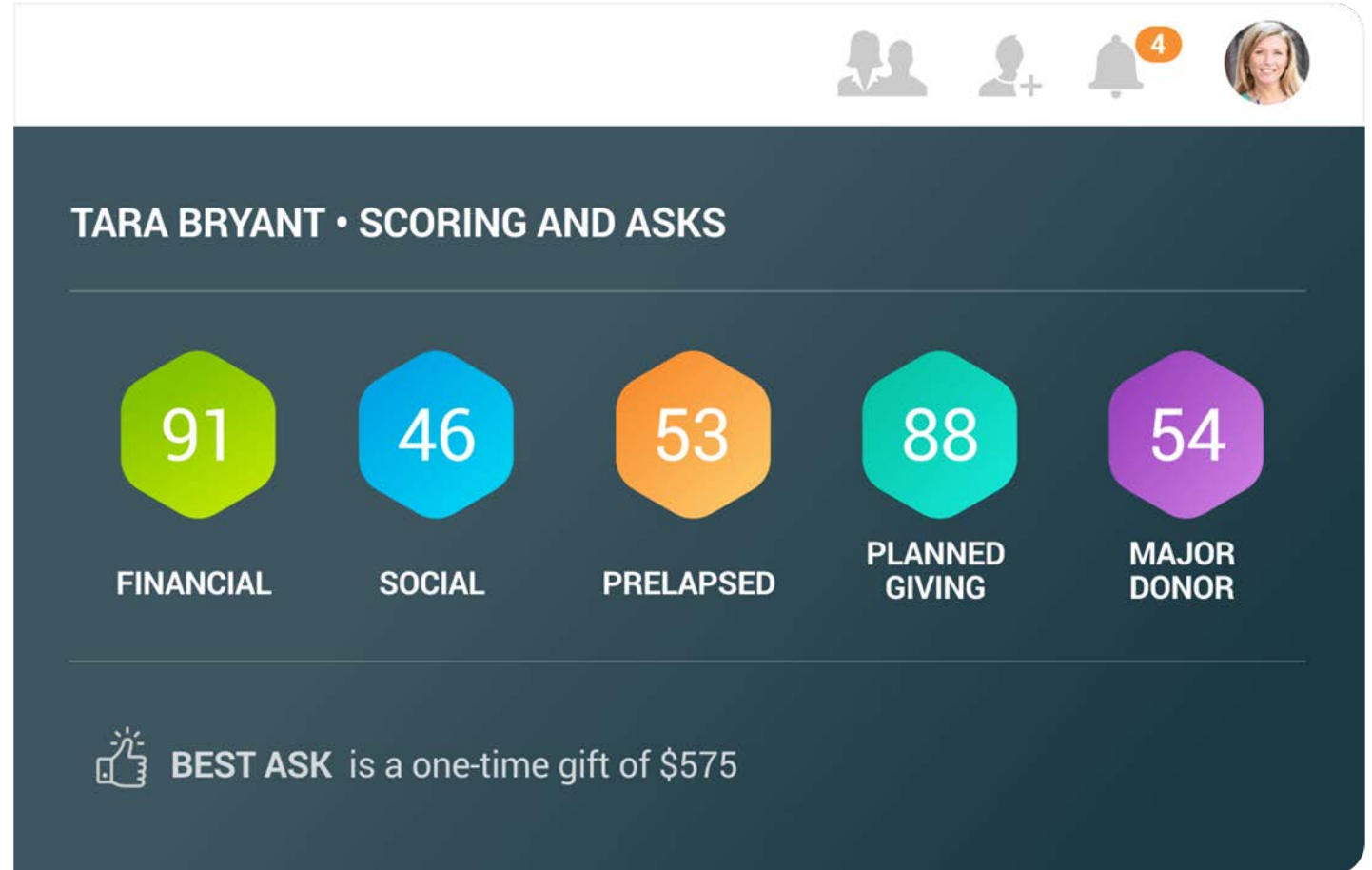
Example

Donor Journey Mapping & Stage-Specific Next Steps



Example

Smart Gift Suggestions & Best Asks



Example

Contextual Follow-Up & Next Steps



Kyle, meet Peter.

He leads the team that cared for [Estela](#), the patient from Guatemala you supported, and he wrote you this note:

"Kyle, you and Watsi have done something special, which is allow us to say yes to patients like Estela. It creates hope, revitalizes imaginations, and reshapes medical realities. Happy Valentine's Day. Thanks for being on this journey with us."

This Valentine's Day, support one of Peter's patients.

And dedicate the donation to someone you love!

[VIEW PATIENTS](#)

THE RESPONSIVE SYSTEM

Responsive Fundraising

Listen, Connect, Suggest

Donor Growth Model

Acquisition, Retention, Cultivation

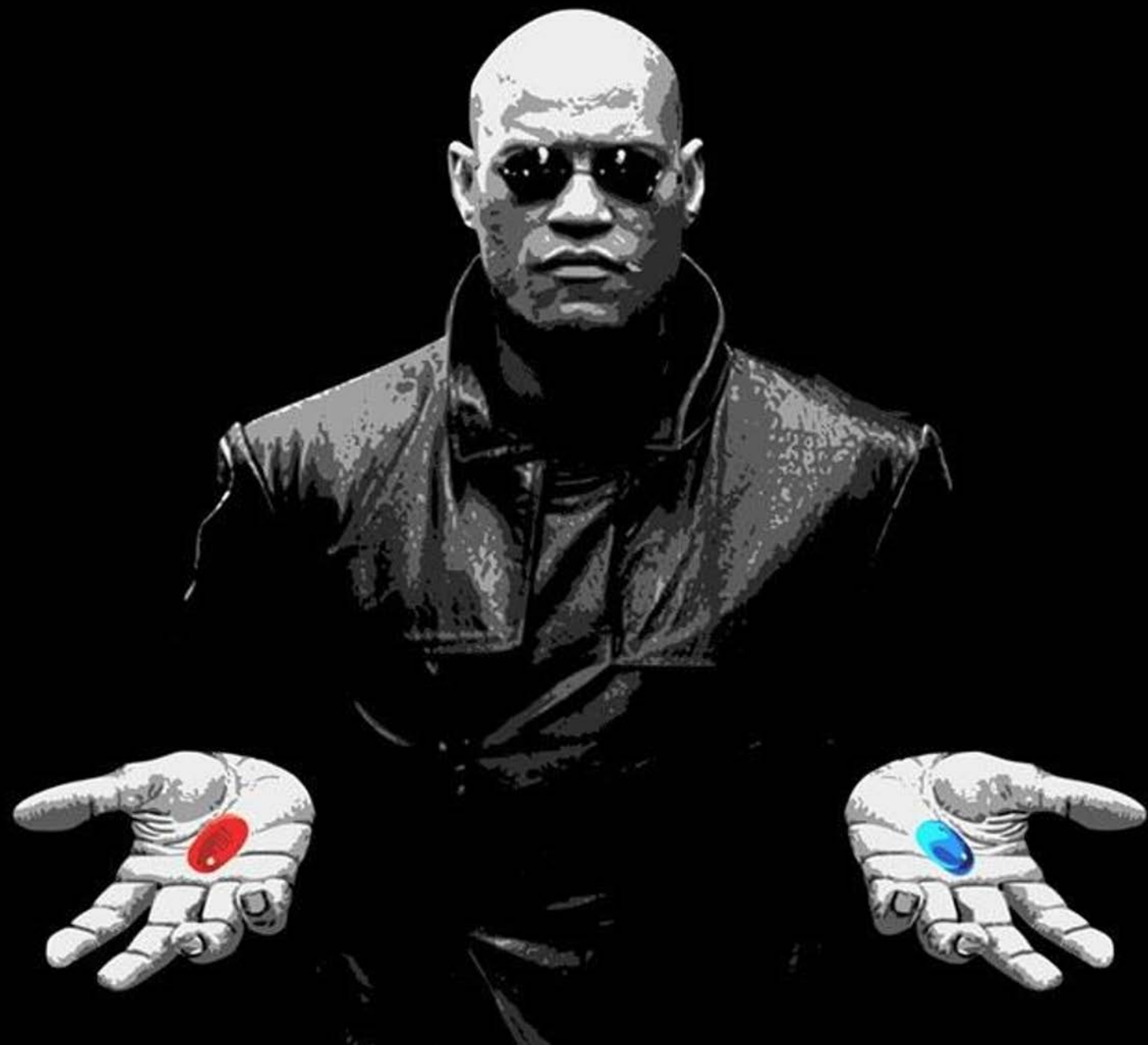
Dynamic Playbook

Personas, Campaigns, Multi-Channel,
Donor Journey

Technology Platforms

Responsive CRM, Automation, Smart
Giving, Email/Mail/Text, AI, Analytics



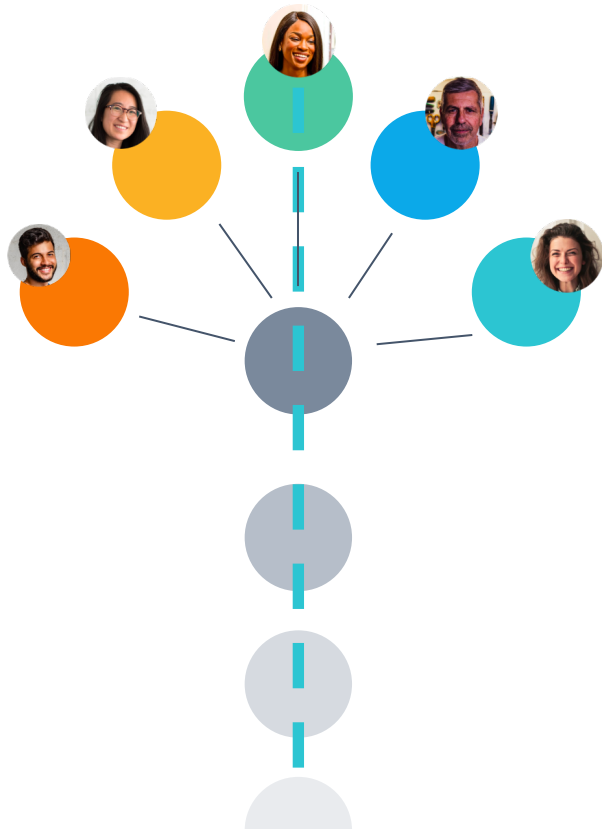


Your Nonprofit Has A Choice

Will you carry on or adapt your system to grow?

Traditional

Impersonal, Static, Siloed



OR

Responsive

Personal, Dynamic, Connected





OFFER

The Responsive Fundraising Pack

Send an email to responsive@virtuouscrm.com with subject line "**RAISE**" and we'll send you:

- The 50+ Page Responsive Fundraising Playbook
- A 30-minute video showcasing the why and how of Responsive Fundraising
- All 9 sessions from the Responsive Nonprofit Summit





QUESTIONS?

Now's my time to
hear from you!

Raise
2020

Raise
2020



Session Ratings

Don't forget to rate each session!

VISIT RAISE APP

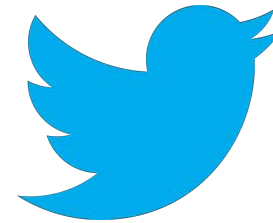
Follow us
ON SOCIAL



fb.com/onecause



@onecause



@onecause

#FEARLESSFUNDRAISER
#RAISE2020