



Tips for **Creating**
Peer-to-Peer *Personas*

Thurs Feb 28th, 2019 1pm ET | 12pm CT | 10am PT

SESSION HOSTS



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Corporate Giving Connection is a full service development, marketing, and corporate social responsibility consulting firm focusing on strategic planning and implementation for your nonprofit organization or corporation.

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POWERFUL FUNDRAISING SOLUTIONS



1.5 Billion Raised



1.5 Donors
Engaged Annually



15,000+ Fundraisers



Agenda

- Social Donors 101
- About Persona Fundraising
- P2P Personas
- P2P Persona Tips

A high-angle photograph of a man and a woman sitting on wooden bleachers. The man, wearing a light blue button-down shirt, is leaning over the woman. The woman, with long reddish-brown hair and wearing a white cardigan, is holding a tablet computer. They appear to be in a collaborative discussion. The image is overlaid with a semi-transparent teal gradient.

Social Donors 101

SOCIAL DONOR STUDY



WHY THE STUDY?



*Changing Donor
Demographics*



*Rise of Mobile
Fundraising*



*Who Are These
Donors?*

Did you know?

Social Donors make up

25% of the US Adult
Population

+/- 58M potential donors

P2P DONOR DEMOGRAPHICS



Sponsor Donors



Occasion/Challenge Donors

| | Sponsor Donors | Occasion/Challenge Donors |
|-------------------------|----------------|---------------------------|
| GENDER | | |
| Male | 47% | 32% |
| Female | 52% | 67% |
| GENERATION | | |
| Gen Z (1996-2000) | 5% | 5% |
| Millennials (1981-1995) | 31% | 41% |
| Gen X (1965-1980) | 30% | 33% |
| Boomers (1946-1964) | 33% | 22% |
| EDUCATION | | |
| Less than college | 55% | 64% |
| College or more | 45% | 36% |
| HHI | | |
| <\$25K | 8% | 13% |
| \$25-50K | 23% | 31% |
| \$50-100K | 37% | 37% |
| \$100-200K | 23% | 13% |
| \$200K+ | 5% | 2% |

P2P GIVING BEHAVIOR



Sponsor Donors



Occasion/Challenge Donors

Donated Before

Yes

61%

46%

No

36%

49%

How familiar they were before donating

Very familiar

47%

43%

Somewhat familiar

38%

39%

Not too familiar

9%

12%

Had only heard of the name of the org.

1%

2%

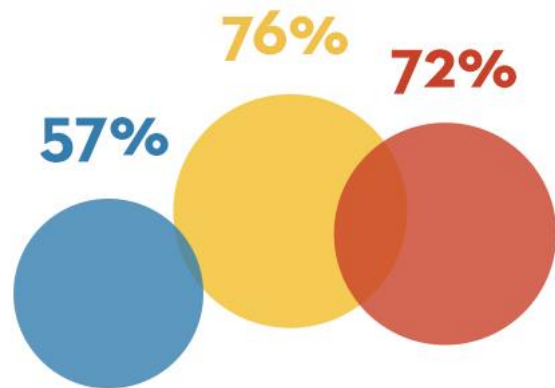
Had never heard of the org. before

4%

3%

ATTRACTING P2P Donors

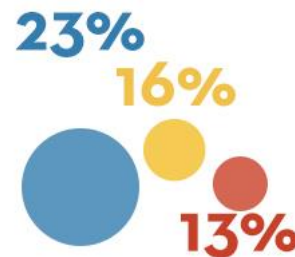
How They Heard About The Donation Opportunity



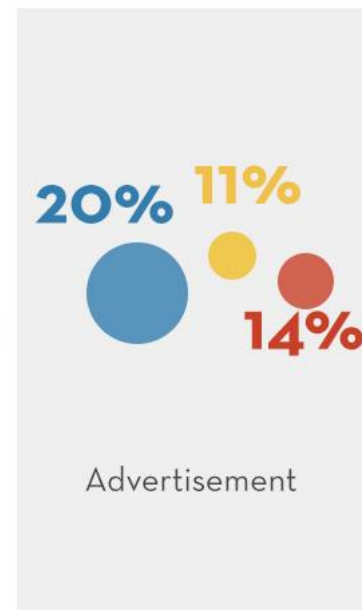
Through a friend, family member, or colleague



The nonprofit or charity reached out directly



Through work



Advertisement

WHY THEY GIVE

#1

It was **easy**
to do.

#2

I care about
the **mission**.

#3

The money raised
would **make a
difference**.



Sponsors

- 1.) Support Person Who Asked
- 2.) Ease
- 3.) Mission



Occasion/Challenge Donors

- 1.) Ease
- 2.) Mission
- 3.) Impact



19% NEVER GOT
Followed Up With!

About Persona Fundraising



TARGET DIFFERENTLY

OLD MODEL

- Gift Size
- Income Levels
- Frequency/Timing
- Area/Preference

NEW THINKING

- Personas
- Channels
- Motivators
- Behaviors

WHAT'S A PERSONA?



WHO ARE THEY

Fictional representations of your ideal donors.



HOW MANY

Most causes have 2-4 personas; quantify and prioritize them for max impact.



WHERE DO I FIND

Created using data, results and interviews. This is critical to success and growth!

WHERE IS THE INFO?



- Online
- Social media
- CRM, fundraising software
- Web analytics
- Quantitative data (surveys)
- Qualitative data (interviews)



Questions?

P2P Personas



WHY IS IT IMPORTANT?



1. Targeted Fundraising
2. Tailored Messaging
3. Internal Alignment
4. Humanize Your Appeals



“As a professional, get things done and make things happen, including helping family, friends and colleagues fundraise. I move fast, but if you engage me in your cause, I am loyal and ardent supporter.”

JOB TITLE Director, Entrepreneur
Vice President, Consultant

Urban or Suburban

AREA Male. Age 30-50.

DEMOGRAPHICS

ASSERTIVE

ENERGETIC

SOCIAL

MEDIA SAVVY

“I am an influencer who believes that social media and technology can help us make the world a better place. My friends and colleagues are closely connected with me. I want to make a difference, but want to invest in causes that use my donations effectively and have max impact. I appreciate cutting-edge campaigns, but good stewardship and good follow-up are key to engage my giving.”

MOTIVATIONS

- I am driven by deep commitment and hard work, and being the best at what I do.
- I want to be viewed as leader in the causes I support.
- I want to hear from the cause on strategic plans and positive results.

GOALS

- Make change happen.
- Use my social influences for social impact.
- Have fun and make a difference.
- Choose causes with efficiency and real-life impact \$

PREFERRED MEDIA CONSUMPTION

- Social impact blogs and case studies
- Social media (Facebook, Twitter Instagram)
- Colleague Recommendations

FEARS & CONCERNS

- Financial stability of nonprofit.
- Wasted resource and fundraising inefficiency.

CHALLENGES & FRUSTRATIONS

- Don't use my donations wisely
- Too many communications
- Too many asks throughout the year
- Lack of personal fundraising
- No modern tools for donations

DONATION HISTORY

- Virtual and DIY Campaigns
- Team Captain
- \$5K in 2018; prefers personalized asks; tech lover

AREAS OF INTEREST

- New Program Support
- Tech investments areas
- Volunteering



"I am an cause junkie. Once I find a group that does work I believe in, I am engaged 100%. I love to sponsor people and teams, recruit friends via social and raise awareness while having fun."

JOB TITLE Manager, Analyst, Specialist, Entrepreneur

AREA Urban or Suburban

DEMOGRAPHICS Female. Age 26-39. Urban.

ARTICULATE

PASSIONATE

PERSUASIVE

ON THE MOVE

"It's paramount that I give to a cause that helps me engage digitally with their mission and visually connect with my networks and their social impact. I enjoy the human stories, the why of how a cause makes a difference. You can find me on social media, supporting runs, walks, fitness challenges and team based fundraising. Let's get it done and have fun!"

MOTIVATIONS

- I am a peer-to-peer influencer.
- I gravitate to creative, innovative & successful campaigns.
- I want to donate on a flexible & intuitive platform that engages me in the cause.

GOALS

- Participate in multiple events and campaigns.
- Increase YOY participation & recruiting new donors for the causes I support.
- Reimagine and grow the organization's volunteer program.

PREFERRED MEDIA CONSUMPTION

- YouTube
- Instagram, Twitter, Snapchat
- Friends & Colleagues
- Organization Email Lists

FEARS & CONCERNS

- Jeopardizing my social cred if a cause isn't legit.
- Not being taken as a serious donor.
- Understanding where I can best give and fit in.

CHALLENGES & FRUSTRATIONS

- Donor communications are too long and boring.
- Tell me about your impact and show me images!
- Need easy ways to engage, on my time and schedule, and on the tools I use everyday.

DONATION HISTORY

- Fund A Cure
- GivingTuesday
- \$1K in 2018; but dedicated volunteer top 5%

AREAS OF INTEREST

- On the ground research,
- Social activism
- Ambassador fundraising & Peer-to-Peer

A photograph of several people's hands stacked together in a circle, symbolizing teamwork and support. The image is overlaid with a blue gradient and a thin orange horizontal line.

P2P Persona Tips

TIP 1: BASIC BIO



WHAT DO YOU KNOW?

- Basic demographics
 - Median age
 - Gender
 - Education level
 - Occupation/Title
 - Employment type
 - Race
 - Marital status
 - Kids or not
- Interests/hobbies

TIP 2: ENGAGEMENT KEYS



HOW TO MOTIVATE ME?

- Ease
- Mission Messaging
- Your Cause Story
- Social Impact
- Channel Preferences
- Target areas (programs, activities)

TIP 3: DONOR HISTORY



HOW DO I GIVE?

- Cadence (monthly, yearly, etc.)
- Avg. gift history
- Donation Channels (annual, major, event)
- Method (online, mail, in person, etc.)
- Annual donations (total vs. to your org)
- Past objections

TIP 4: BRING IT TO LIFE



WHO AM I?

- Real picture
- Key message/appeal
- 2-3 sentence “bio”
- Personal quotes
- Name/archetype (ex. Millennial Marjory, Superfan Sam, Annual Agatha, etc.)

Put ^{it} into **ACTION**

- 1 **EDUCATE** staff and stakeholders
- 2 Use in **ONBOARDING PROCESS**
- 3 **INCLUDE IN** *internal marketing strategies*
- 4 **EMBED** in presentations and communications
- 5 **AUDIT** website, social, and collateral
- 6 Segment *your* existing **DONORS INTO PERSONAS**
- 7 **BRAINSTORM** how to **SEGMENT COMMUNICATIONS**
- 8 **IDENTIFY** communication *to* persona gaps

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WHAT DO I DO NEXT?



Jen



Questions?

A photograph of the Chicago skyline at dusk, with numerous skyscrapers illuminated by their lights against a darkening sky. The buildings are of various architectural styles, including modern glass facades and older brick structures.

*Coming
Soon...*

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2019

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