

onecause® | WEBINAR

LAPSED DONORS

| Is It Worth Winning Them Back and
How Do I Do It?



Nicholas Kristock
Founder & Executive Director
Fleece & Thank You
CEO, KindKatch



Wednesday, Jan. 17, 2024



Raise®

#FEARLESSSERIES

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- **Engage With Us**
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 - Wrap-up email with Webinar recording
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PRESENTERS



Dawn Lego (she/her)
Director, Brand Engagement
OneCause



Nicholas Kristock (he/him)
Founder and Executive Director
Fleece & Thank You
CEO
KindKatch

Lapsed Donors

Is It Worth Winning Them Back
and How Do I Do It?

With your tour guide,
Nicholas Kristock









Lapsed Donors

Is It Worth Winning Them Back
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Yes. The End. Oh, how, you ask?



“Will he be talking with slides the whole time?”

- person concerned they went to wrong presentation

You're in the wrong place if you're here for...



1. Responsive Maturity Model – Erik Tomalis
2. Strategic Reflection: Proactive Planning 2024– Steve & Sarah
3. **Line Dancing Lessons** – sponsored by Charity Ace (you're late)

“Are we going somewhere here?”

- morning person



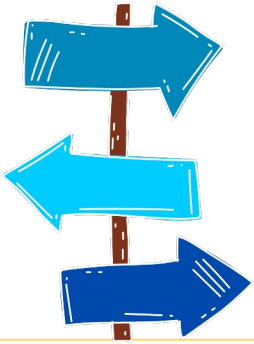
Houston, we have a problem.

Lapsed donors HURT.



BIG IDEA:

Lapsed donors don't have to be painful!



Agenda

1. Why Lapsing?
2. Can We Curb Lapsing?
3. How Can We Win More Back?
- 4. Where do I start?!**
5. Let's Stay Friends



Ms. Harlow



Why do donors lapse?



"It's all your fault!"

- *bad friend*

A grid of diverse people's faces in a monochromatic yellow color scheme. The faces are arranged in a grid pattern, with some individuals looking directly at the camera and others looking slightly away. The overall tone is warm and inclusive.

“Not really ALL my fault.”

- sound mind

Lapsed Donor Overview

- 40% responded that they do not give money to charity because they do not have the financial resources.
- 22% **volunteer in lieu of donating** money.
- 17% **donate food or goods in lieu of donating** money.
- 12% **don't trust organizations** to spend their money well.
- 7% **prefer to spend their money on** their family and friends.
- 2% **don't believe** that organizations make a **positive difference**



20%

[Source: NP Tech For Good](#)

Lapsed Donor Overview

1. Give Local
2. Saving Money
3. Donation Too Small To Make Difference
- 4. Unsolvable Problem**
- 5. Misunderstanding Problem**
- 6. Where Does My Dollar Go?**
- 7. Shouldn't Government Solve This?**
- 8. Enabling**



THAT percentage IS my fault.



“But you can’t win them all.”





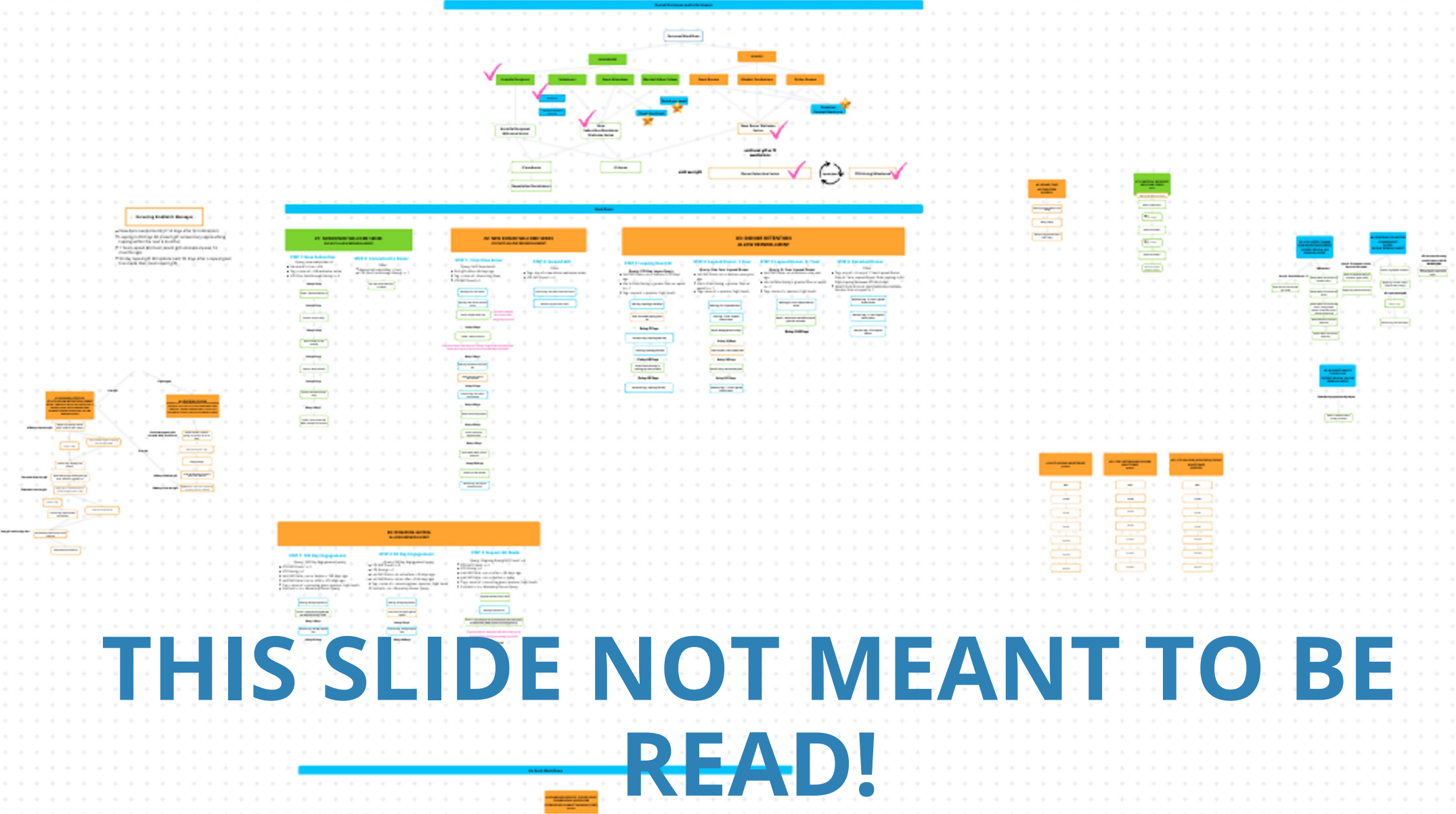
The background of the slide is a grid of framed gold and platinum records. Each record is mounted in a white frame with a small plaque below it. The entire image is overlaid with a semi-transparent blue filter. The text is centered in the middle of the grid.

“Can we curb lapsing?”

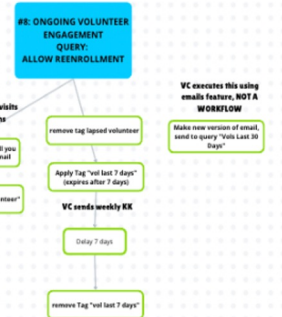
A collection of framed gold and platinum records is displayed on a wall. Each record is mounted in a white frame with a small plaque below it. The entire scene is overlaid with a semi-transparent blue filter. The records are arranged in a grid-like pattern, with some frames slightly offset from others.

“It’s all about the journey.”

Donor Journeys

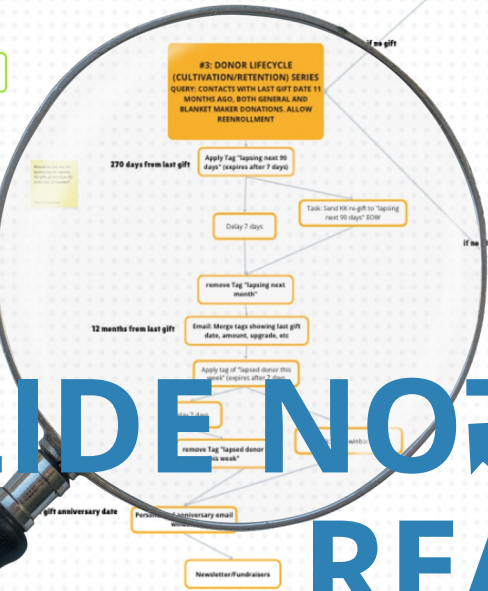


THIS SLIDE NOT MEANT TO BE READ!



VC connects this using email feature, NOT A WORKFLOW
 Make new version of email, send to query "Vol Last 30 Days"

It's time to keep building your relationship with your donor by sharing more information about your cause. If possible, include a link, map, digital infographic, and follow up with a brief summary of the data.



THIS SLIDE NOT MEANT TO BE READ!

Pre-Lapsing and Lapsed Series



#3: DONOR RETENTION ALLOW REENROLLMENT

STEP 1: Lapsing Next 90

Query: 270 Day Lapse Query

- Last Gift Date= on or before= 270 days ago
- Life to Date Giving = greater than or equal to = 1
- Tag= none of = sponsor, high touch

Add tag: Lapsing in 90 days

Task: Send KK lapsing next 90

Delay: 7 Days

Remove tag: Lapsing Next 90

Add tag: Lapsing 270-365

Delay: 94 Days

Remove tag: Lapsing 270-365

STEP 2: Lapsed Donor- 1 Year

Query: One Year Lapsed Donor

- Last Gift Date= on or before= one year ago
- Life to Date Giving = greater than or equal to = 1
- Tag= none of = sponsor, high touch

Add tag: FTY Lapsed Donor

Add tag: 1 Year Lapsed Donor Date

Email 1: New Donor Welcome 1

Delay: 30 Days

Task: Send 1 Year Lapsed KK

Delay: 335 Days

Remove tag: 1 Year Lapsed Donor Date

STEP 3: Lapsed Donor- 2+ Year

Query: 2+ Year Lapsed Donor

- Last Gift Date= on or before= one year ago
- Life to Date Giving = greater than or equal to = 1
- Tag= none of = sponsor, high touch

Add tag: 2+ Year Lapsed Donor Date

Email 1: Retention workflow email post 24+ months

Delay: 365 Days

STEP 4: Retained Donor

Filter:

- Tag= any of = Is any of 1 Year Lapsed Donor Date, 2+ Year Lapsed Donor Date, Lapsing in 90 Days, Lapsing between 270-364 days
- YEAR TO DATE PLUS PASSTHROUGH GIVING= Greater than or equal to 1

Remove tag: 2+ Year Lapsed Donor Date

Remove tag: 1 Year Lapsed Donor Date

Remove tag: Lapsing between 270-364

Remove tag: Lapsing in 90

Remove tag: FTY Lapsed Donor



“Pre-lapsing? That a thing?”

- skeptic

STEP 1: Lapsing Next 90

Query: 270 Day Lapse Query

- Last Gift Date= on or before= 270 days ago
- Life to Date Giving = greater than or equal to = 1
- Tag= none of = sponsor, high touch

Add tag: Lapsing in 90 days

Task: Send KK lapsing next 90

Delay: 7 Days

Remove tag: Lapsing Next 90

Add tag: Lapsing 270-365

Delay: 64 Days

Email: Anniversary is coming up next month!

Delay: 30 Days

Remove tag: Lapsing 270-365



“So what about the ones you lose?”

- person thinking ahead

Can we win more back?

STEP 2: Lapsed Donor- 1 Year

Query: One Year Lapsed Donor

- Last Gift Date= on or before= one year ago
- Life to Date Giving = greater than or equal to = 1
- Tag= none of = sponsor, high touch

Add tag: FTY Lapsed Donor

Add tag: 1 Year Lapsed Donor Date

Email: Happy Anniversary!

Delay: 14 Days

Task: Send 1 Year Lapsed KK

Delay: 14 Days

Email: Sorry we missed you!

Delay: 335 Days

Remove tag: 1 Year Lapsed Donor Date

Win-back Campaign

Most Common Miss

STEP 3: Lapsed Donor- 2+ Year

Query: 2+ Year Lapsed Donor

- Last Gift Date= on or before= one year ago
- Life to Date Giving = greater than or equal to = 1
- Tag= none of = sponsor, high touch

Add tag: 2+ Year Lapsed Donor
Date

Email 1: Retention workflow email
post 24+ months

Delay: 365 Days

#3: DONOR RETENTION ALLOW REENROLLMENT

STEP 1: Lapsing Next 90

Query: 270 Day Lapse Query

- Last Gift Date= on or before= 270 days ago
- Life to Date Giving = greater than or equal to = 1
- Tag= none of = sponsor, high touch

Add tag: Lapsing in 90 days

Task: Send KK lapsing next 90

Delay: 7 Days

Remove tag: Lapsing Next 90

Add tag: Lapsing 270-365

Delay: 94 Days

Remove tag: Lapsing 270-365

STEP 2: Lapsed Donor- 1 Year

Query: One Year Lapsed Donor

- Last Gift Date= on or before= one year ago
- Life to Date Giving = greater than or equal to = 1
- Tag= none of = sponsor, high touch

Add tag: FTY Lapsed Donor

Add tag: 1 Year Lapsed Donor Date

Email 1: New Donor Welcome 1

Delay: 30 Days

Task: Send 1 Year Lapsed KK

Delay: 335 Days

Remove tag: 1 Year Lapsed Donor Date

STEP 3: Lapsed Donor- 2+ Year

Query: 2+ Year Lapsed Donor

- Last Gift Date= on or before= one year ago
- Life to Date Giving = greater than or equal to = 1
- Tag= none of = sponsor, high touch

Add tag: 2+ Year Lapsed Donor Date

Email 1: Retention workflow email post 24+ months

Delay: 365 Days

STEP 4: Retained Donor

Filter:

- Tag= any of = Is any of 1 Year Lapsed Donor Date, 2+ Year Lapsed Donor Date, Lapsing in 90 Days, Lapsing between 270-364 days
- YEAR TO DATE PLUS PASSTHROUGH GIVING= Greater than or equal to 1

Remove tag: 2+ Year Lapsed Donor Date

Remove tag: 1 Year Lapsed Donor Date

Remove tag: Lapsing between 270-364

Remove tag: Lapsing in 90

Remove tag: FTY Lapsed Donor

Future Journeys

#4: ONGOING GIVING ALLOW REENROLLMENT

STEP 1: 180 Day Engagement

Query: 180 Day Engagement query

- LTD Gift Count >= 2
- LTD Giving >=1
- Last Gift Date = on or before = 180 days ago
- Last Gift Date = on or after = 270 days ago
- Tag = none of = recurring giver, sponsor, high touch
- Contacts = in = Monetary Donor Query

Add tag: 180 Day Repeat Gift

Email 1: Send 'Recurring Gift Ask (#4: Ongoing Giving)' email

Delay: 7 Days

Remove tag: 180 Day Repeat Gift

Delay: 83 Days

STEP 2: 90 Day Engagement

Query: 90 Day Engagement query

- LTD Gift Count >= 2
- LTD Giving >=1
- Last Gift Date = on or before = 90 days ago
- Last Gift Date = on or after = 180 days ago
- Tag = none of = recurring giver, sponsor, high touch
- Contacts = in = Monetary Donor Query

Add tag: 90 Day Repeat Gift

Task: Send 90 repeat gift kk update

Delay: 7 Days

Remove tag: 90 Day Repeat Gift

Delay: 84 Days

STEP 3: Repeat Git Made

Query: Ongoing Giving Gift Count >=2

- LTD Gift Count >= 2
- LTD Giving >=1
- Last Gift Date = on or after = 30 days ago
- Last Gift Date = on or before = today
- Tag = none of = recurring giver, sponsor, high touch
- Contacts = in = Monetary Donor Query

Append Wealth Contact Data

Add tag: Repeat Giver

Email 1: Send 'Ongoing Giver Engagement (General Donors Call Workflow)(NEW Repeat Giver Engagement)'

If general donor, workflow #X picks them up for general donor last 7 days weekly board calls

Delay: 30 Days





Benchmarking - Is This Working?

Benchmarking- Is This Working?

1. Report: Life-to-Date Giving and # of donors
2. Divide LTD Giving/#of donors
3. Establish Benchmark LTV and track over time
(quarterly, semiannually, annually, etc.)



“Whoa Nich, that was intense...”

- overwhelmed audience member

“Where do I start?”

- same breath

Where to Start: Donor Journeys

- 1. List every place or moment you have an interaction with a contact.**
 - Email/Mobile Newsletter Signup
 - Event Registration
 - Volunteer Signup, etc.
- 2. From each point of interaction, map out a series of communications.**
- 3. Identify areas of overlap and query accordingly.**
- 4. Strategically insert the places you want to “make an ask.”**
- 5. Launch ONE at a time!**

Donor Outreach SWAT Team



Owner	Owner Notes	Contact Name	Amount	Date	Primary Phone	LTD Gift Count	LTD Giving	Last Gift Amount	Last Gift Segment	Notes
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“Oh shoot, I was catching up on my growing pile of work email. What did you talk about today?”

- Person I am no longer friends with

TLDR: Lapsed Donors

1. Make your donor journey intentional.
2. Specifically map out pre-lapsing phase.
3. Diversify with omni channel communication and see what “sticks.”
4. Start with larger segments and get more granular over time.
 - All lapsed gifts
 - Lapsed by dollar amount
 - Lapsed by campaign
5. Donor Outreach SWAT

TLDR: Is It Working?

1. **Report: Life-to-Date Giving and # of donors**
2. **Divide LTD Giving/#of donors**
3. **Establish Benchmark LTV and track over time**

Donor Journeys



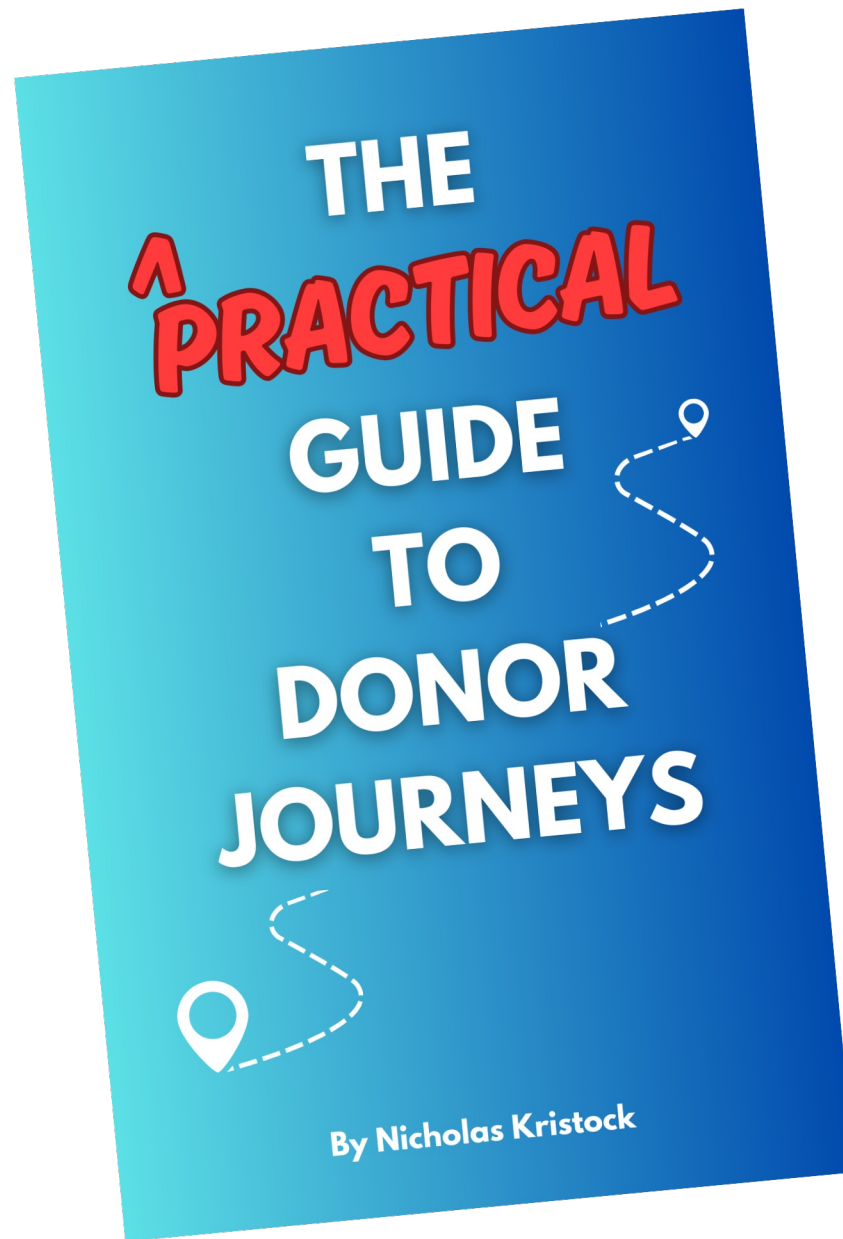
Building Donor Relationships

When you build a relationship with a donor, you are building a long-term relationship. This is not a one-time transaction. It is a continuous process of building trust and loyalty. This is why it is important to focus on building relationships with donors, rather than just focusing on fundraising.



Donor Journey





**Coming
Summer 2024**

**Early Access
Available**



BIG IDEA:

Lapsed donors don't have to be painful!



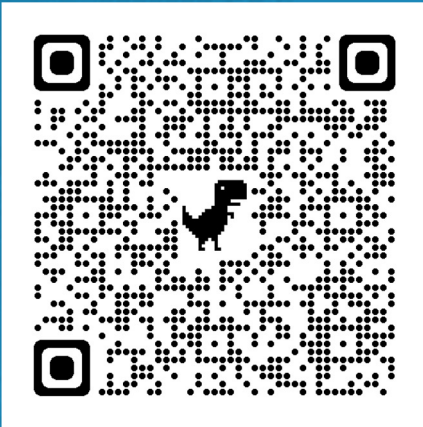
KindKatch



Let's Stay Friends

nicholas@kindkatch.com

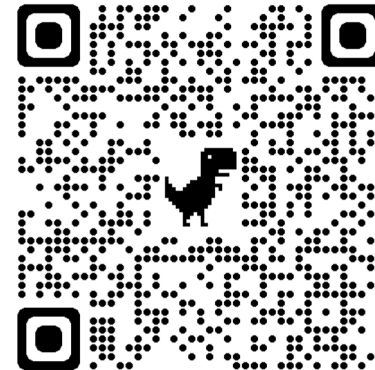
calendly.com/nicholaskristock



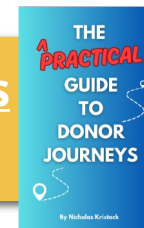
Presentation
Slideshow



Calendly Link



Donor Journeys
Early Access



#1 Most Viewed
Youtube Video of All
Time

onecause® | WEBINAR

RESPONSIVE MATURITY MODEL: 5 DIGITAL STEPS TO

Scale Donor Engagement



Tuesday, Jan. 23, 2024



Eric Tomalis

Chief Evangelist &
Dir. of Business Development
Virtuous



CELEBRATING

1000

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