

onecause® | WEBINAR

RESPONSIVE MATURITY MODEL: 5 DIGITAL STEPS TO

Scale Donor Engagement



Erik Tomalis

Chief Evangelist &
Dir. of Business Development
Virtuous



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Learn more about the OneCause Fundraising Platform

onecause®

PRESENTERS



Dawn Lego (she/her)

Director, Brand Engagement
OneCause



Erik Tomalis (he/him)

Chief Evangelist and
Director of Business Development
Virtuous



The Responsive Maturity Model

5 Steps To Scale Generosity

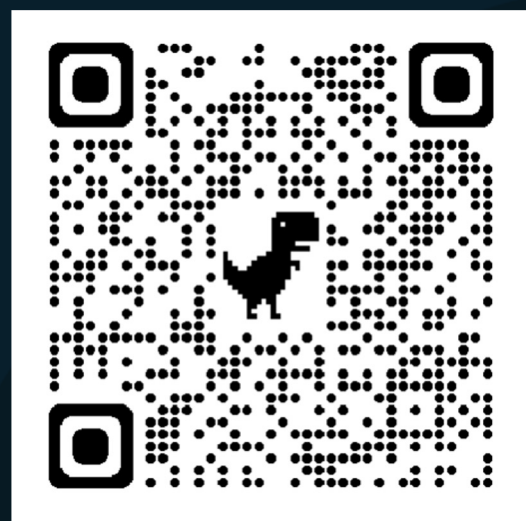
Erik Tomalis

Chief Evangelist & Director of Business Development

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A man with glasses and a beard, wearing a dark suit and a patterned tie, stands at a podium in a room filled with bookshelves. He is gesturing with both hands as if speaking. The room has tall wooden bookshelves filled with books. In the foreground, the backs of several audience members' heads are visible. The entire image has a blue tint. There are large white quotation marks on the left and a large white 'C' shape on the right.

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

Paul Batalden | MD, Researcher, Healthcare

WHERE WE ARE

Traditional, Unresponsive Systems for Generosity



The Unresponsive Donor Experience

Donor/Prospect Acquisition

Personal and varied

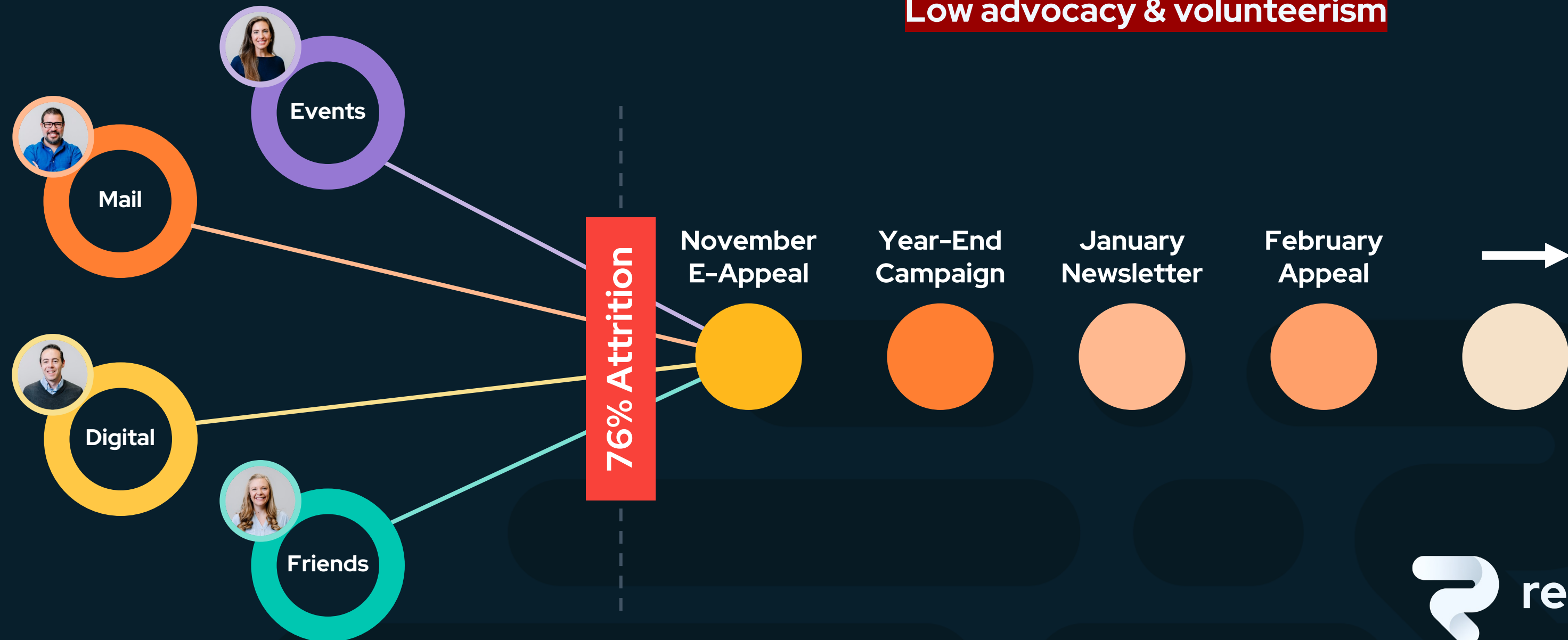
Based on donor's intent

Retention & Cultivation

One-to-many, one-way, impersonal

Low retention & average gift

Low advocacy & volunteerism



An Unresponsive Team Experience

Fundraising



Manual data entry
Limited collaboration
Frustrated teams

Marketing



Misaligned KPIs
Multi-system chaos
Limited collaboration

Program



Siloed from Fundraising
Lack of Transparency
Disconnected Data

Finance/IT



Multi-system chaos
Backlogged
Lack of visibility

WHAT'S POSSIBLE?

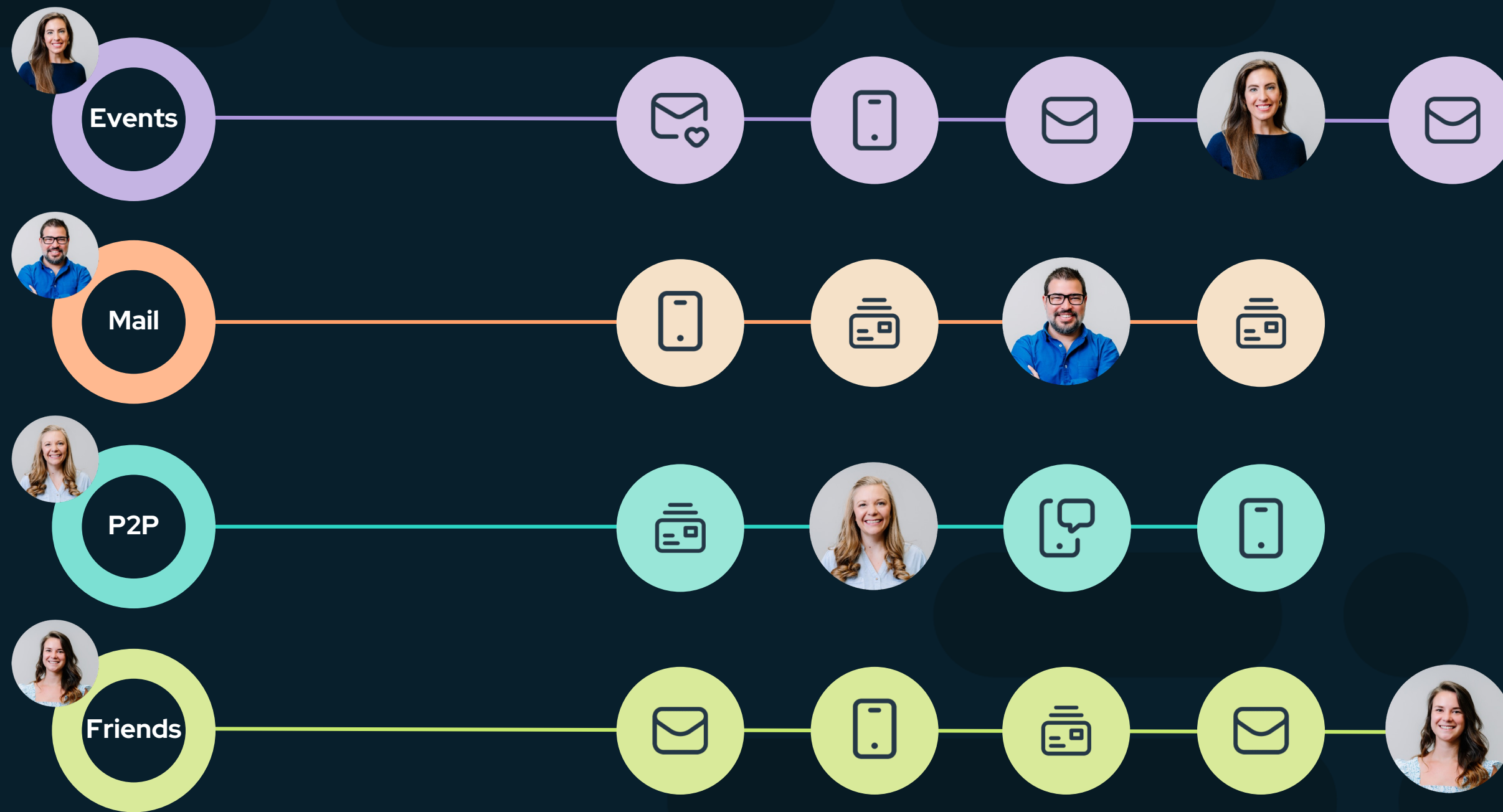
A More Responsive Model for Generosity





The Responsive Donor Experience

Dynamic, personal journeys based on donor's timing



Retention



Average Gift



Engagement

Marketing/Comms



Finance/Ops



the
responsive
team experience

Healthy, effective teams
KPI alignment
Impact transparency
Generosity growth

Fundraising



Program



How do we get there?



Unresponsive

One to many/impersonal
Low retention/engagement
Frustrated teams



Responsive

Personal connections
High retention/loyalty
Healthy teams

WHY USE A MATURITY MODEL?

A Clear Path Toward a Better Future

- ✓ Achievable Action Plan
- ✓ Provable Results Along the Way
- ✓ Tech, Tactics & Team Required



The Responsive Maturity Model

Unresponsive

Responsive

1
Data Health
& Reporting

2
Integrated
Tech & Teams

3
Segmentation
& Personas

4
Dynamic
Campaigns

5
AI
Personalization

The Responsive Maturity Model

1

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“If we have data, let’s look at data. If all we have are opinions, let’s go with mine?”

– James Barksdale, former CEO Netscape

“In God we trust, all other bring data.”

– W. Edwards Deming





MATURITY STEP 1

Data Health & Reporting

Confidence in your communication

Coverage on contact info (phone, email, address)

Team wide visibility into (trusted) KPIs & Goals

TECH, TACTICS & TEAM Data Health & Reporting

- ✓ Data health tools, email hygiene, NCOA/appends
- ✓ Policies for data health
- ✓ Fundraising + Ops data review process
- ✓ Shared, real-time reporting
- ✓ Weekly KPI reviews



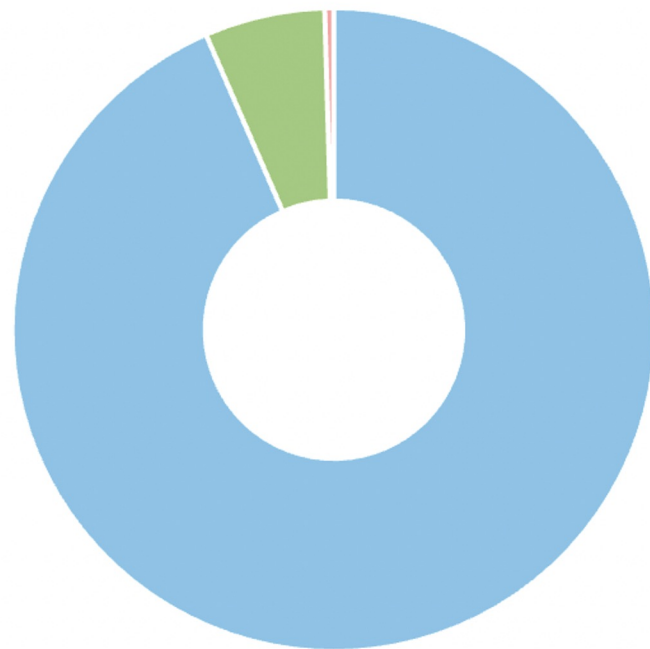
Start with 3 Core Shared Team KPIs

Everyone knows their number!

Giving Revenue by Tier ?

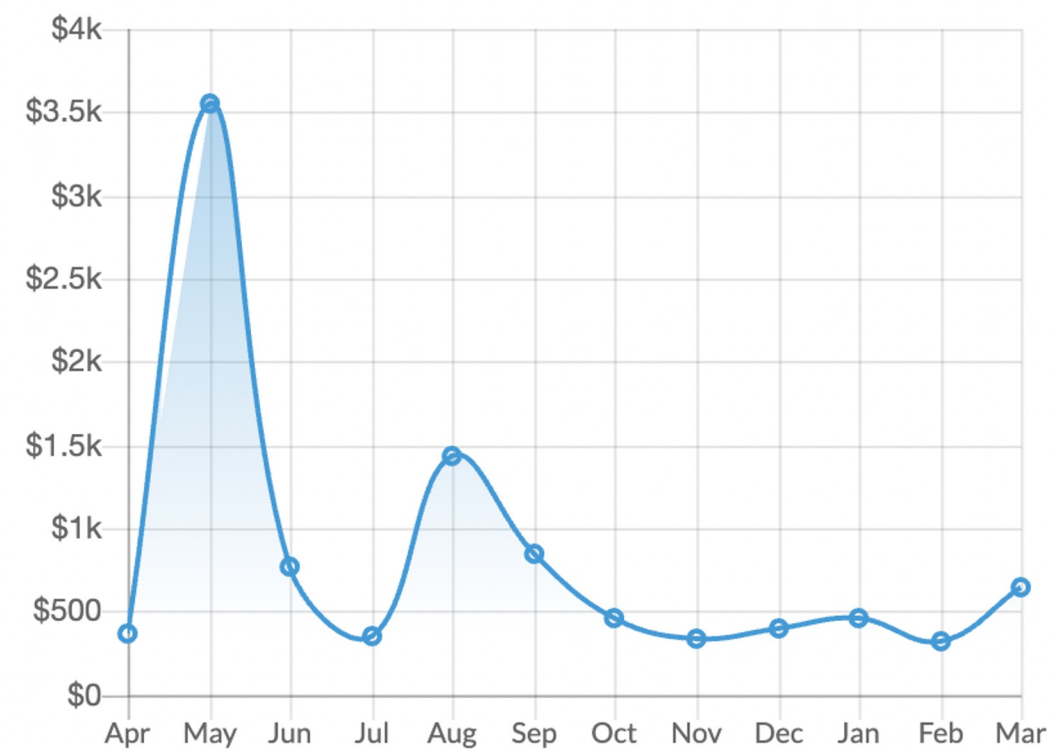
Last 12 Months

- < \$1,000
- \$1,000 - \$10,000
- > \$10,000

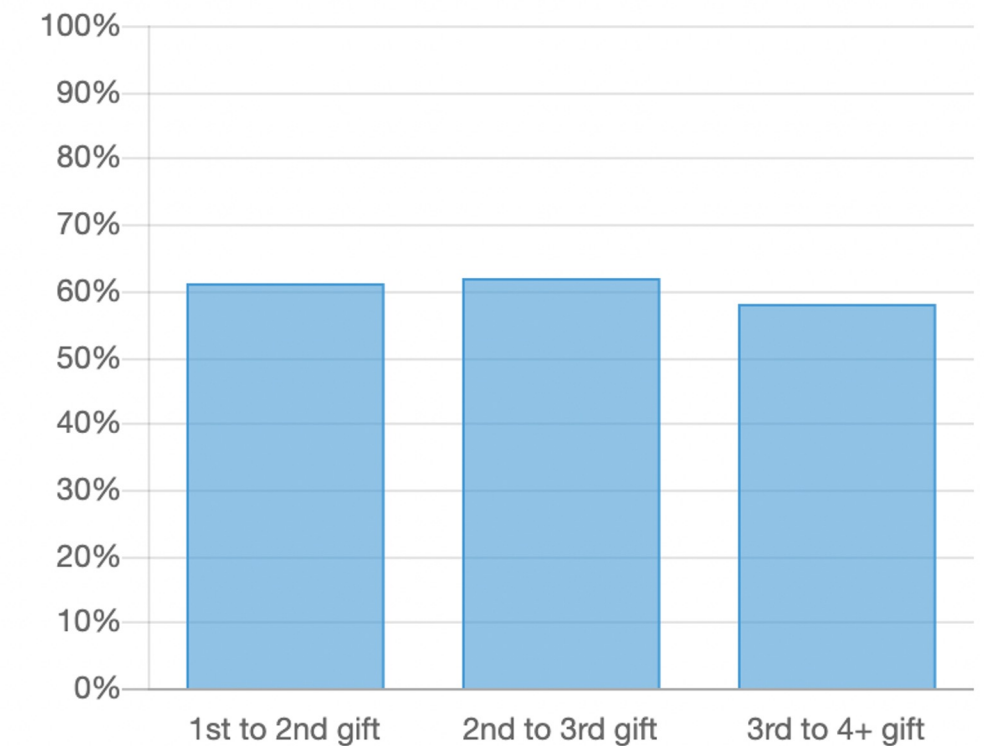


Average Gift ?

Last 12 Months



Retention ?



The Responsive Maturity Model

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2

MATURITY STEP 2

Integrated Teams & Tech



Top 11 Reasons You Should Integrate Software

1. Higher employee productivity

2. Better data flow

3. Increased data simplification

4. Improved data accessibility

5. Error reduction

6. A 360-degree view of customer information

7. Faster business processes

8. Improved efficiency across teams

9. More flexibility and scalability

10. Improved security

11. Reduced costs

Monika Ambrozowicz on G2Crowd



MATURITY STEP 2

Integrated Teams & Tech

Increased team collaboration with cross-team KPIs

Integrated Marketing & Donor data (Email, Mail, SMS, Web Visits, etc)

Integrated Program outcomes and Volunteerism data



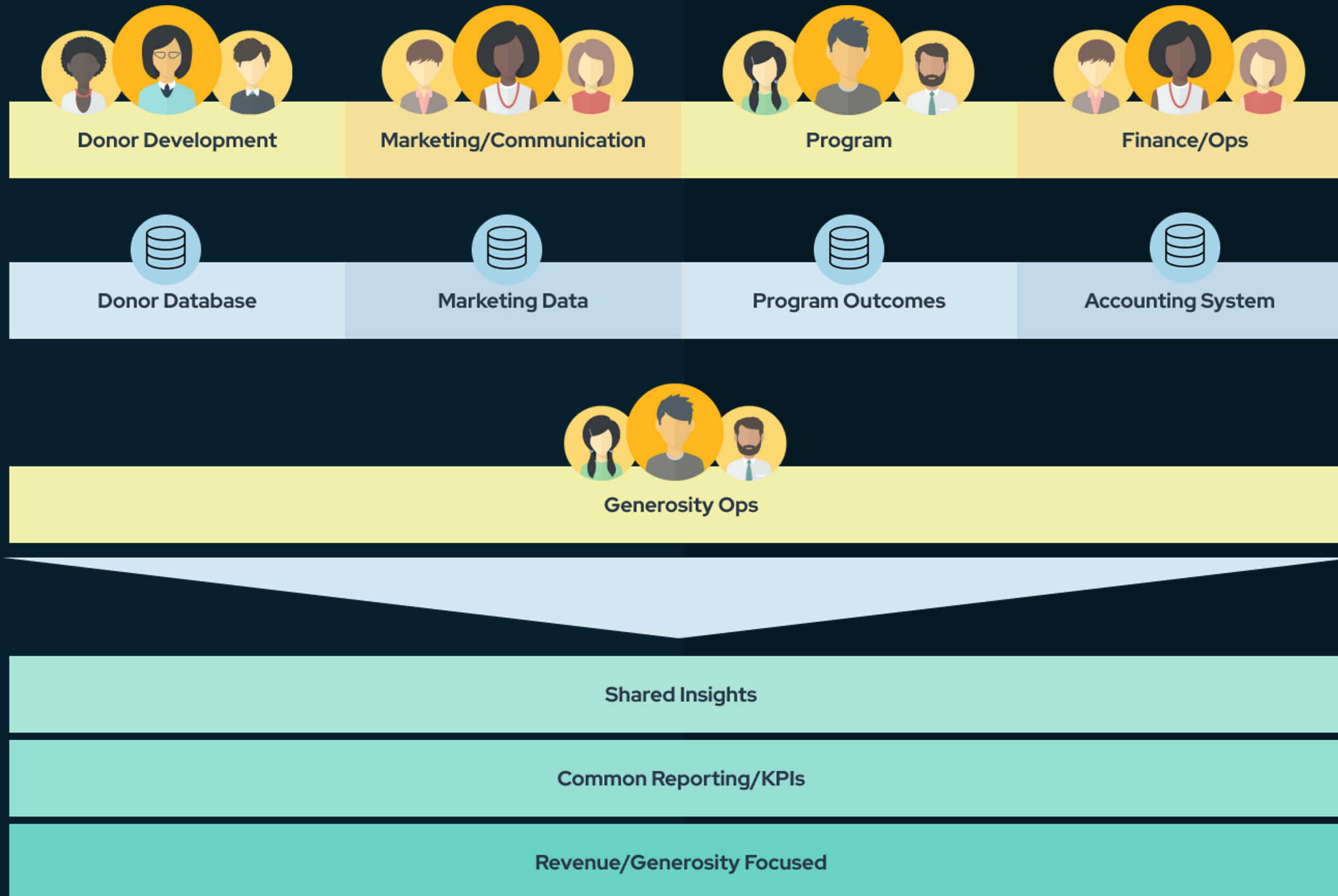
TECH, TACTICS & TEAM

Integrated Teams & Tech

- ✓ CRM + Marketing + Email + Giving + Volunteer + Program Impact
- ✓ Quarterly cross-team goals
- ✓ Generosity Ops to drive collaboration



The Power of a Generosity Ops Team



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MATURITY STEP 3

Segmentation & Personas

Personalized communication drives generosity!

Create personas by affinity, topic, giving & engagement

Vary mass marketing based on persona (Gift Asks, Copy)



Katie



Jeremy



Diane




TECH, TACTICS & TEAM

Segmentation & Personas

- ✓ Segmentation tools + automated tagging
- ✓ 3-5 core personas based on donor behavior
- ✓ Marketing + Volunteer + Fundraising aligning on key personas





“Multi-channel donors – those who give both online and offline – are worth 3 times more than online only or offline only donors and their first year donor retention rate is 2 times higher.”

– NextAfter – The State of Multi-Channel Donor Communication



3

KEYS TO SUCCESS

Bonus : Multi-Channel For the Win!

Tell a single story with integrated campaigns (mail, SMS, social, email)

Integrated with major donor strategy

Campaign Start



Day 1



Email with Video Story

Day 5



Call to answer questions on email

Day 15



Core impact stat with push to web

Day 30



Appeal letter with related story



TECH, TACTICS & TEAM

Bonus : Multi-Channel For the Win!

- ✓ Email + SMS + CRM integrated
- ✓ Map out timing of each touch
- ✓ Create a connected story
- ✓ Monthly cross-team campaign planning with input from Program





NEXT STEPS

Bonus : 3rd Party Data Signals

Outside data to create a 360 degree view

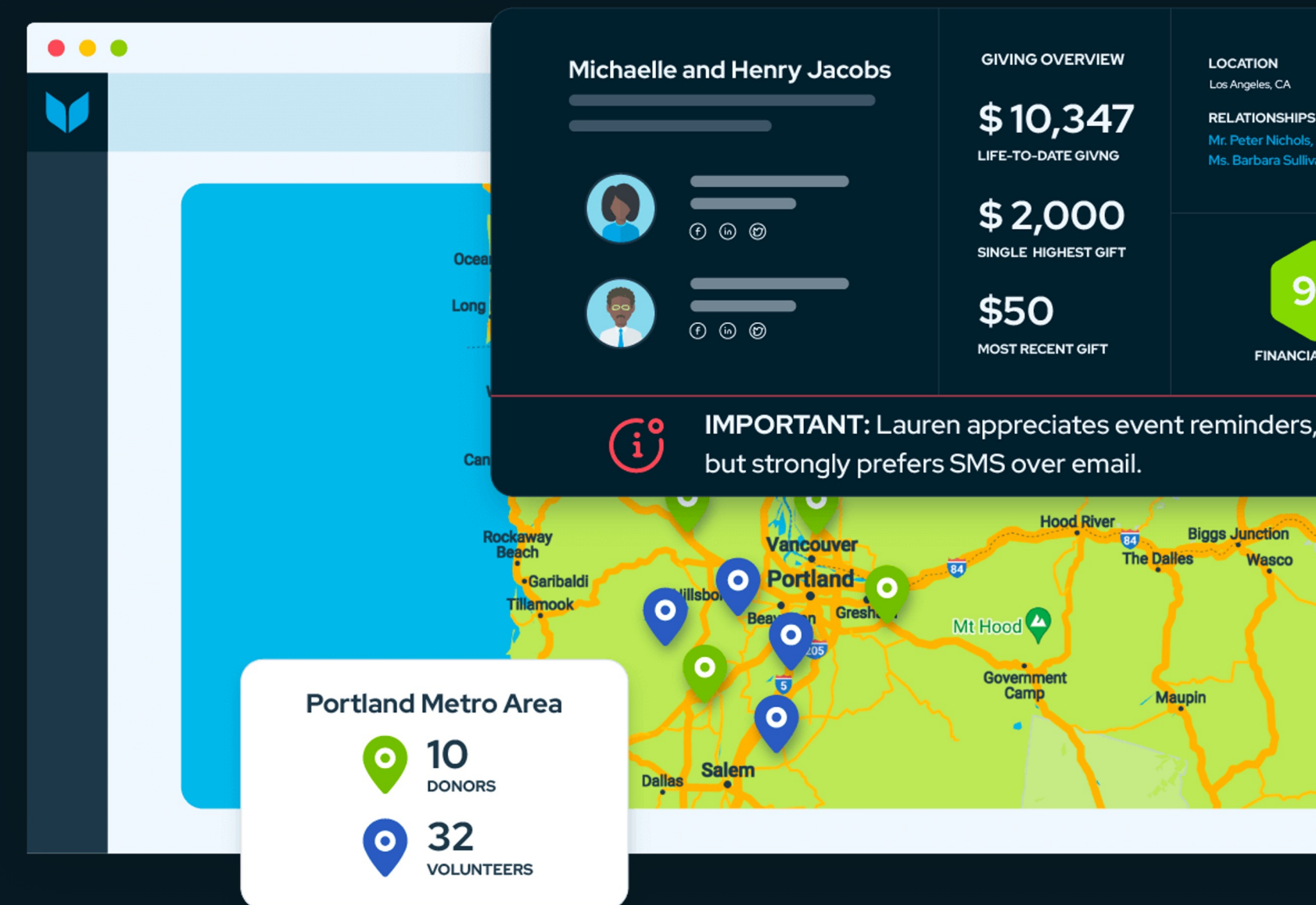
Wealth, channel, age, gender, marital status, interests, geo



TECH, TACTICS & TEAM

Bonus : 3rd Party Data Signals

- ✓ Wealth & demographic data integrated to CRM + Marketing
- ✓ Automate major gifts assignment & tagging
- ✓ Marketing, Fundraising & Major Gifts sync on key data points



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4 MATURITY STEP 4 Dynamic Campaigns

Individualized campaigns based on each person's behavior & timing



Dynamic Campaigns

Erik



First gift to water campaign



New Donor Journey

Jenna



Abandons donation page



New Donor Journey

Courtney



Hasn't given in 13 months



New Donor Journey

Charlie



Clicks to email & downloads PDF



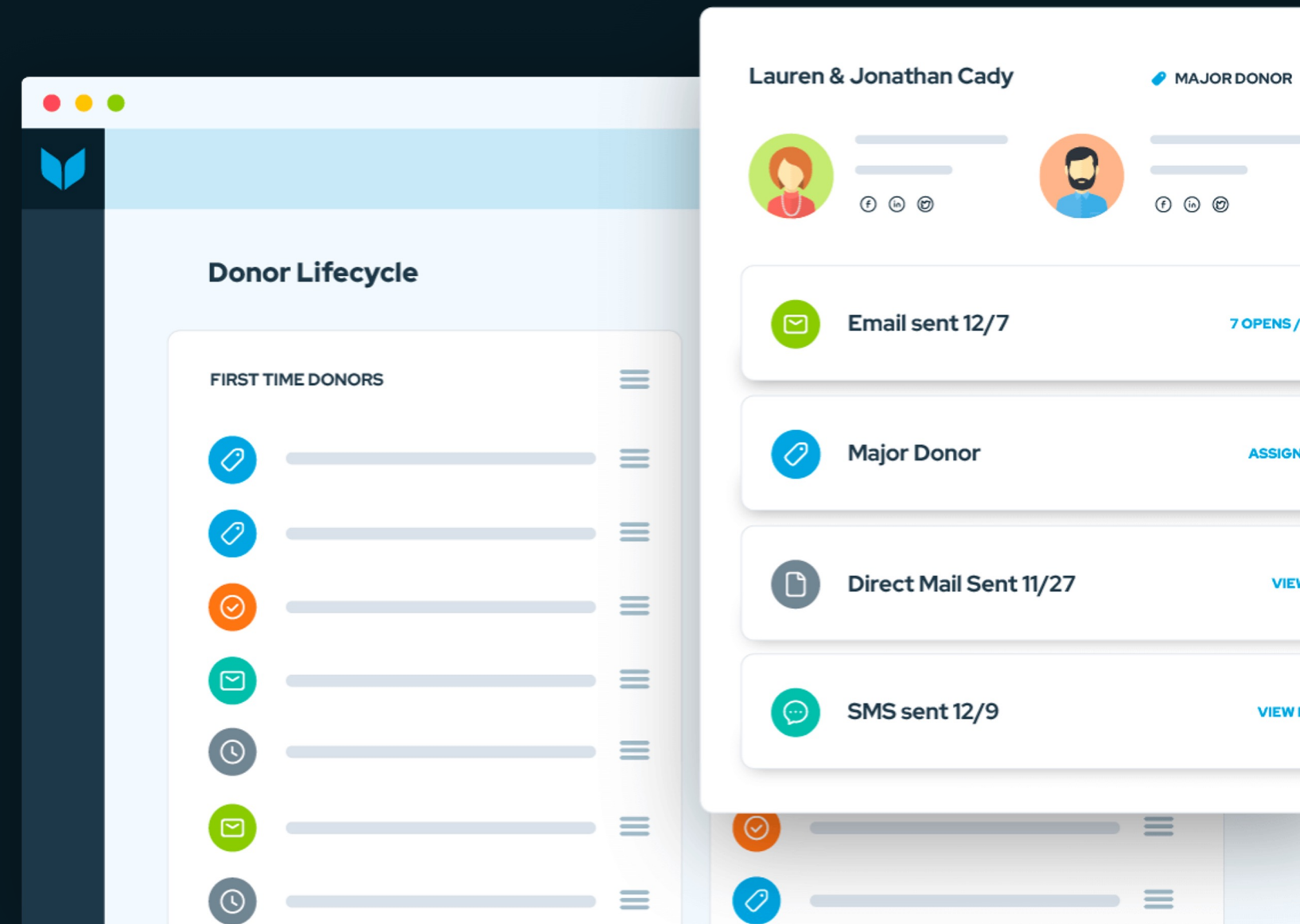
New Donor Journey



TECH, TACTICS & TEAM

Dynamic Campaigns

- ✓ Marketing Automation + CRM
- ✓ Map out key constituent journeys (2-4 to start). ** Start with retention focus*
- ✓ Program works with Marketing to connect key stories to each journey



4

NEXT STEPS

Bonus : Inbound Campaigns

Creating Responsive Relationships Before the First Gift

Opportunities for a small “Yes” (*Downloads & exclusive content*)

Focus on SEO, influencers, & related sites

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EMERGING MATURITY STEP 5

AI Accelerated Personalization

Predict a response with AI

Who? Channel? Which ask? Message?

Accelerate content with GPT

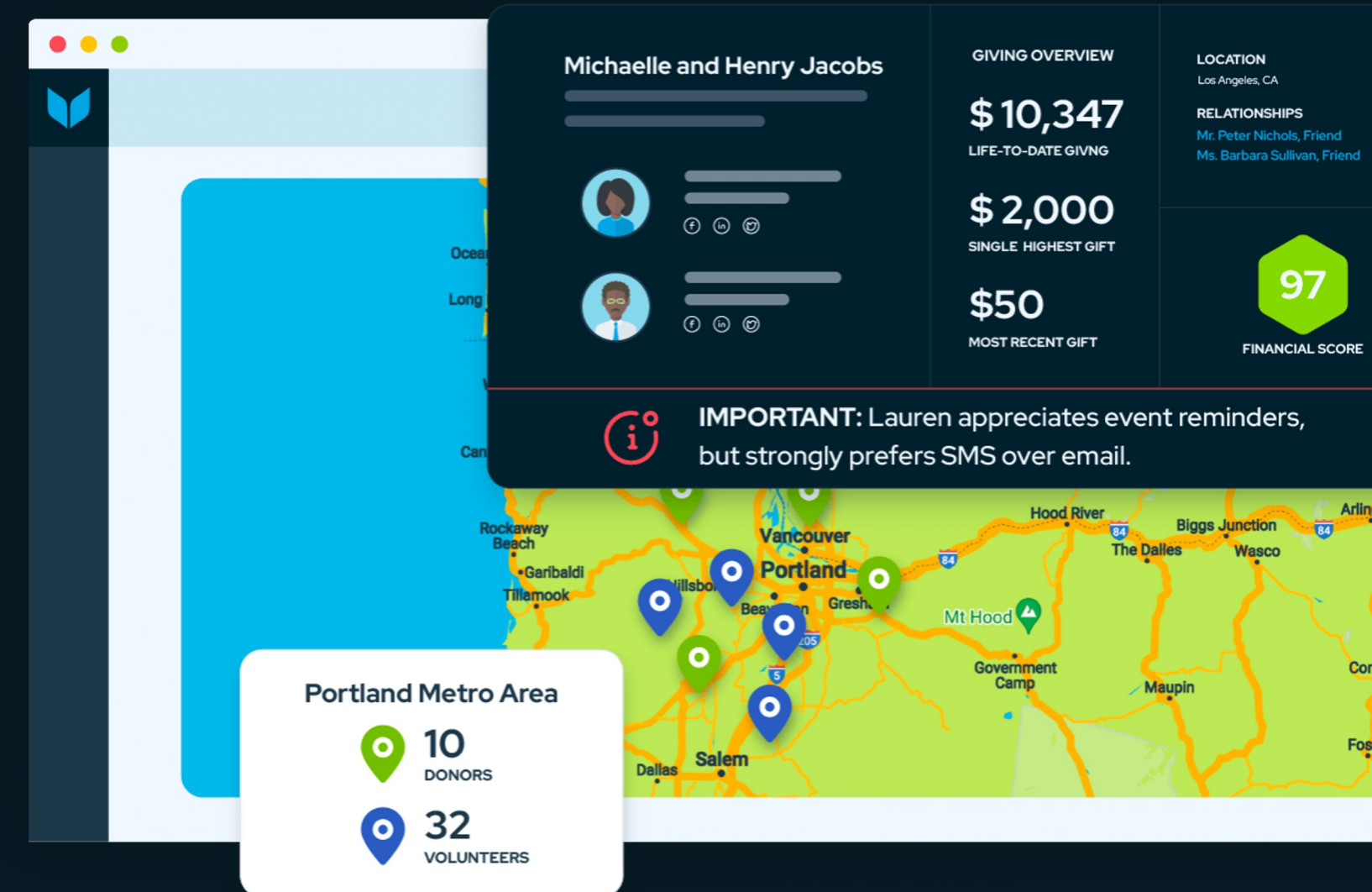
Personalized email, SMS, blogs, etc



TECH, TACTICS & TEAM

AI Accelerated Personalization

- ✓ Integrated AI modeling & GPT in Marketing, CRM and Online Giving
- ✓ Start with AI to predict retention, major gifts, and response rates
- ✓ Stretch to hire Data Scientist and find AI ready partners



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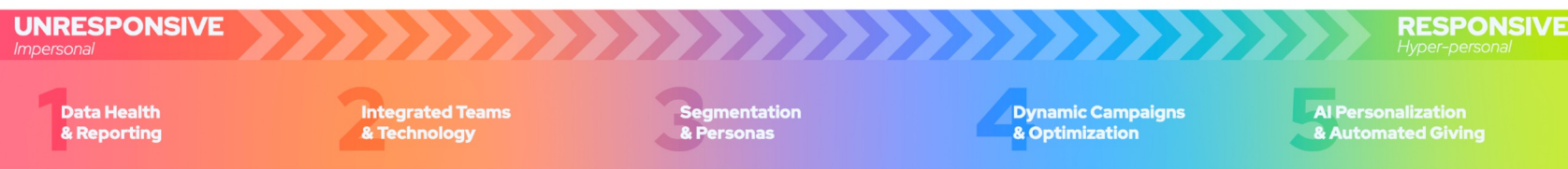
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Get the Maturity Model Cheat Sheet
virtuous.org/model

The Responsive Nonprofit Fundraising Maturity Model



Model guides you step by step on how to create hyper-personalized experiences with every donor to grow giving at scale.



Category	Tasks/Goals
Data Health	<ul style="list-style-type: none"> •Data health policies & process •Data field creation & collection process •Manual to automated data collection •Weekly data monitoring meeting •Data health remediation software
Integrated Teams	<ul style="list-style-type: none"> •Define cross-team KPIs & goals •Cross-team reports & collaboration •Identify duplicate work across teams •Map constituent touches across teams •Responsive generosity ops team
Segmentation	<ul style="list-style-type: none"> •Segment donors by giving (small, large, recurring) •Segmentation software & database •Enhance segments with cross-team data •Personalize segments with auto tagging •Enable multi-channel experiences with segments
Dynamic Campaigns	<ul style="list-style-type: none"> •Automate real-time, dynamic campaigns •Automate touches on multiple channels •Personalize campaigns by key behaviors •Build donor momentum with small to big wins •Optimize "ask" based on journey & timing •Responsive multi-channel campaign system
AI Personalization	<ul style="list-style-type: none"> •Experiment with AI driven personalization software •Set your desired AI & personalization outcome •Leverage AI/ML to predict donor giving/retention •GPT to accelerate content & personalization •AI automates low touch work to seem high touch •AI alerts for team human touchpoints
Reporting	<ul style="list-style-type: none"> •Align team to 3-5 annual & quarterly goals •Identify reports that measure goals •Reports identified, defined, & built •Manual to real-time reporting •Real-time KPIs & goals dashboard •Weekly trend meeting using dashboard
Integrated Tech	<ul style="list-style-type: none"> •Identify tools used in constituent journey •Eliminate redundant tools •Integrate tools/data (Responsive Platform) CRM, Marketing, Volunteer, Digital •Incorporate key program impact data
Personas	<ul style="list-style-type: none"> •Build 2-3 core donor/volunteer personas •Build out a donor journey for each persona •Automate donor tagging by persona/behavior •Enhance personalization with online & offline data •Vary gift asks, messages & channel •Integrated campaigns by persona
Optimization	<ul style="list-style-type: none"> •Build multi-channel dynamic campaign dashboard •Review campaign giving results in real-time •Run messaging, content, and channel tests •Update journey based on engagement & ROI •Responsive optimization & ROI system
Outcomes of The Model	<ul style="list-style-type: none"> Increased donor retention Increased average gift size Decreased staff burn out Acquisition of new donors



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Smart Moves

24 Innovations to Boost
Event Fundraising Success in 2024



Steve Lausch
Director, Product Marketing
OneCause



Joe Duca
Vice President, Product Strategy
OneCause



Wednesday, February 7, 2024



CELEBRATING

100

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