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UNDERSTANDING TODAY'S DONOR:

How To **Design Systems** That Build Lasting
Donor Relationships At Scale and **Grow Giving**

WEDNESDAY, JUNE 17TH | 1PM ET | 12PM CT | 11AM MT | 10AM PT

HOSTS



Kelly Velasquez-Hague
VP of Content Marketing
OneCause



Noah Barnett
Partnerships & Community
Virtuous





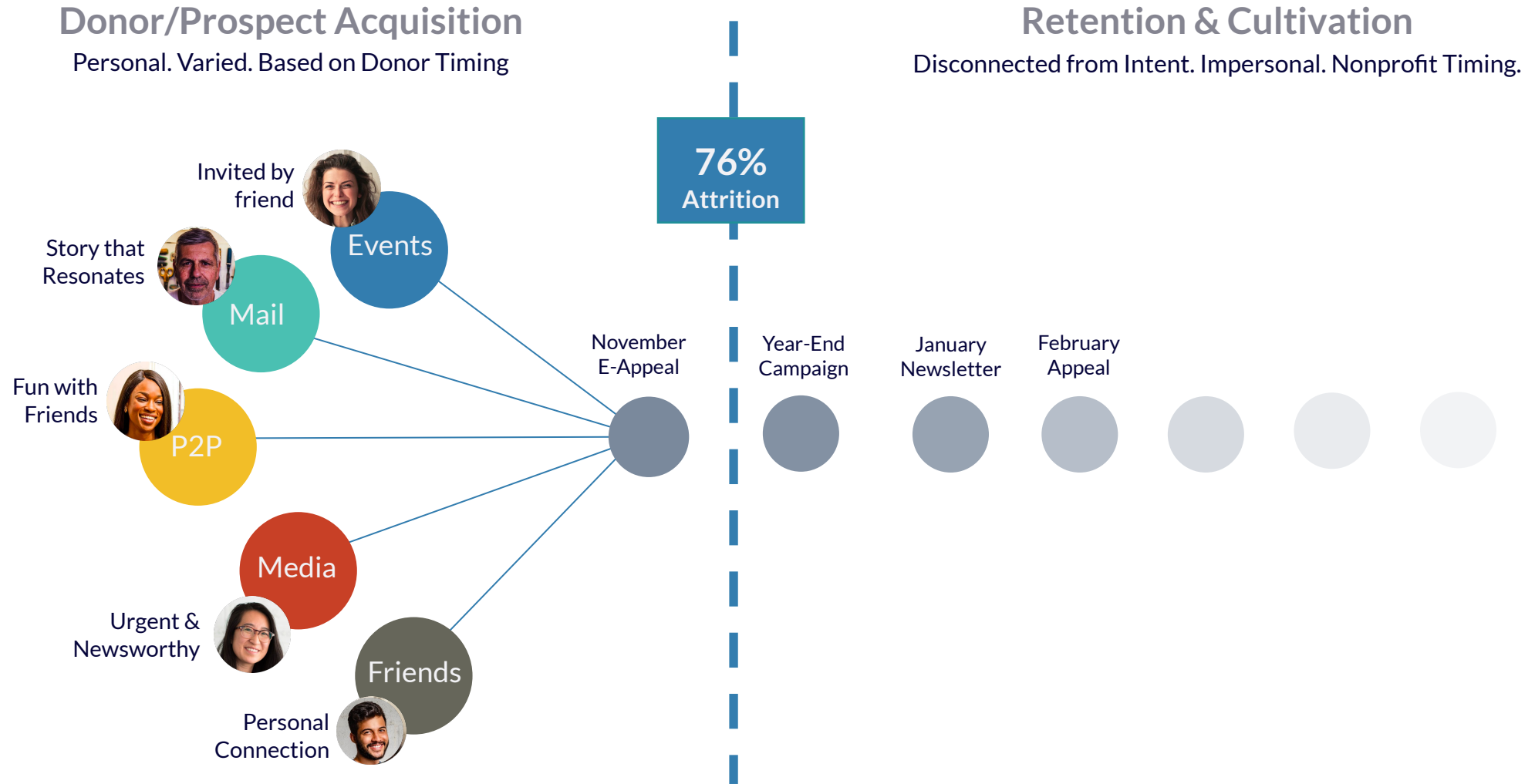


GIVING IS DEEPLY PERSONAL

The Problem

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

Traditional Fundraising is Largely Impersonal



A MASSIVE DISCONNECT

Impersonal Tactics

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

Source: Managing Donor Defection by Adrian Sargeant

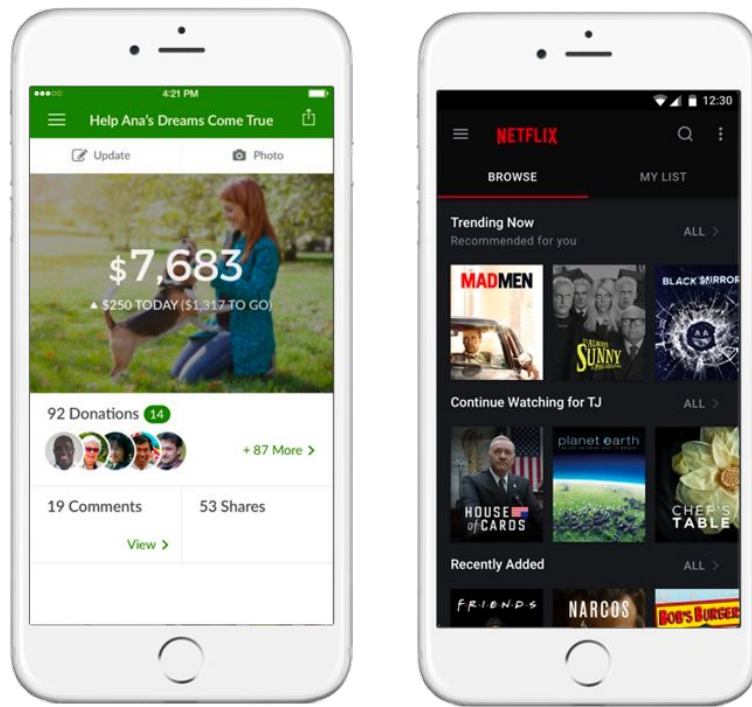
“Every system is perfectly designed to get the results it gets.”



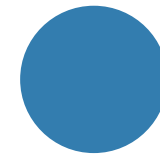
— **Paul Batalden**
MD, Researcher, Healthcare

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



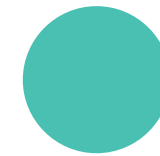


Shift from mass marketing to personal, dynamic experiences



Tailored to You

Curated content and experiences based on your interests.



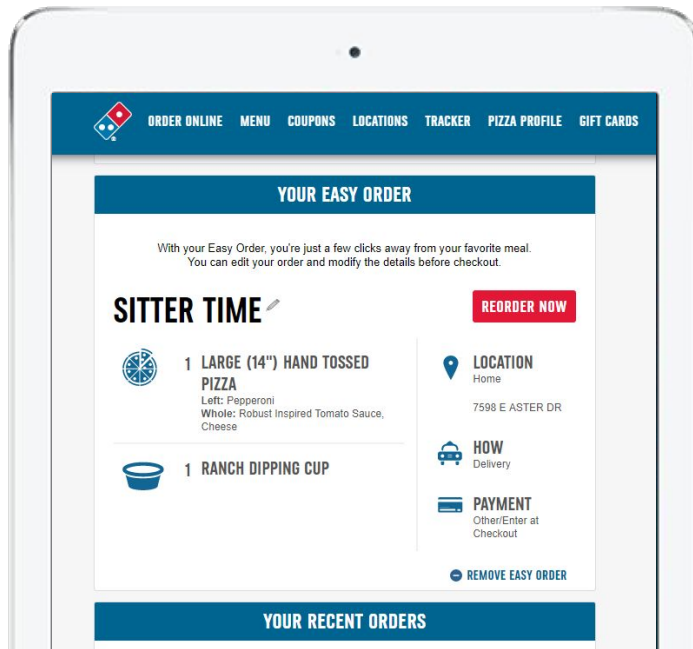
Based on Your Tribe

Community-based and connected to the activity of my friends.



Two-Way, Behavior Driven

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





Personalization Everywhere

audible



Disney



STITCH FIX



NETFLIX



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 with a textured, bumpy surface, appearing in shades of red and orange against a dark, grainy background. A central white rectangular box with a thin black border contains the text "COVID-19" in bold white capital letters.

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?

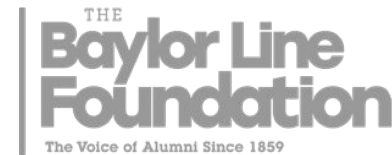
Two important questions

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

How can overcome the **inertia?**

There's Good News!

Many of the Nonprofits We Serve are Bridging the Gap





“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.”



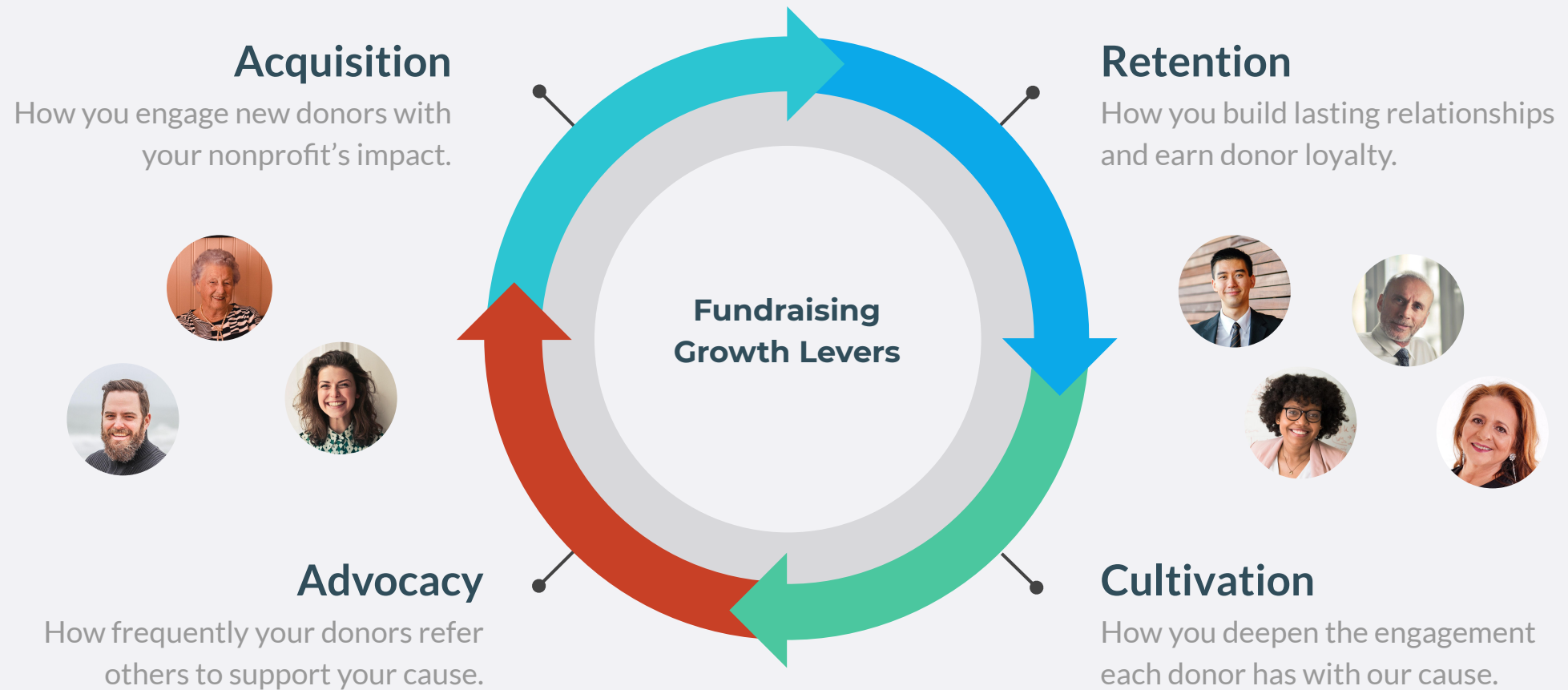
— **Eglantyne Jebb**
Founder of Save the Children

The First Principles of Fundraising

Connecting supporters with your story through systems



The Fundraising Growth Model

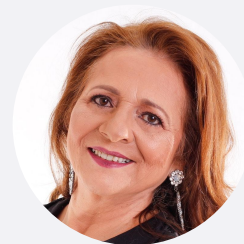
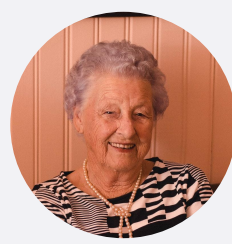
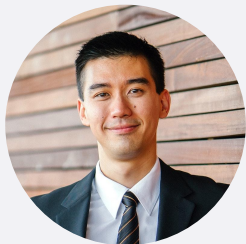


**How are nonprofits accelerating
their growth model and closing the
gap with modern donor?**

Growth Means 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



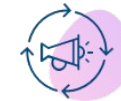
Listen

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



Repeat

Test. Find out what works.
Rinse and repeat.



Connect

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



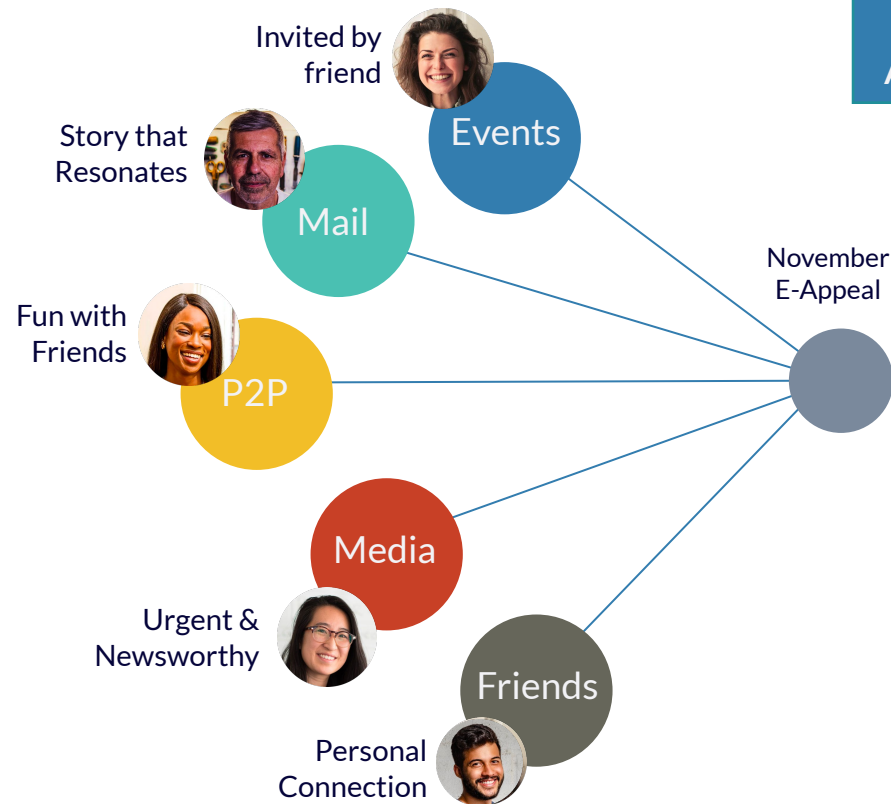
Suggest

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

Remember this Approach?

Donor/Prospect Acquisition

Personal. Based on Donor Timing



76%
Attrition

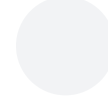
Retention & Cultivation

Disconnected from Intent. Nonprofit Timing.

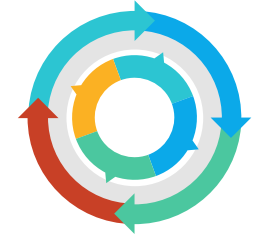
Year-End
Campaign

January
Newsletter

February
Appeal



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!



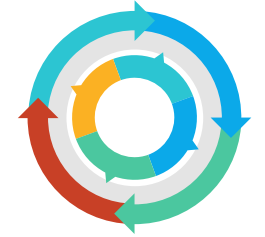
15 days



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



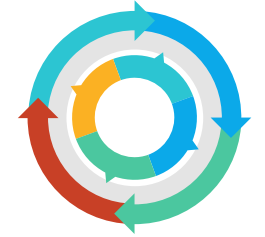
James



Malaria Info Series

Clicks to email and downloads PDF

Responsive, Dynamic Campaigns

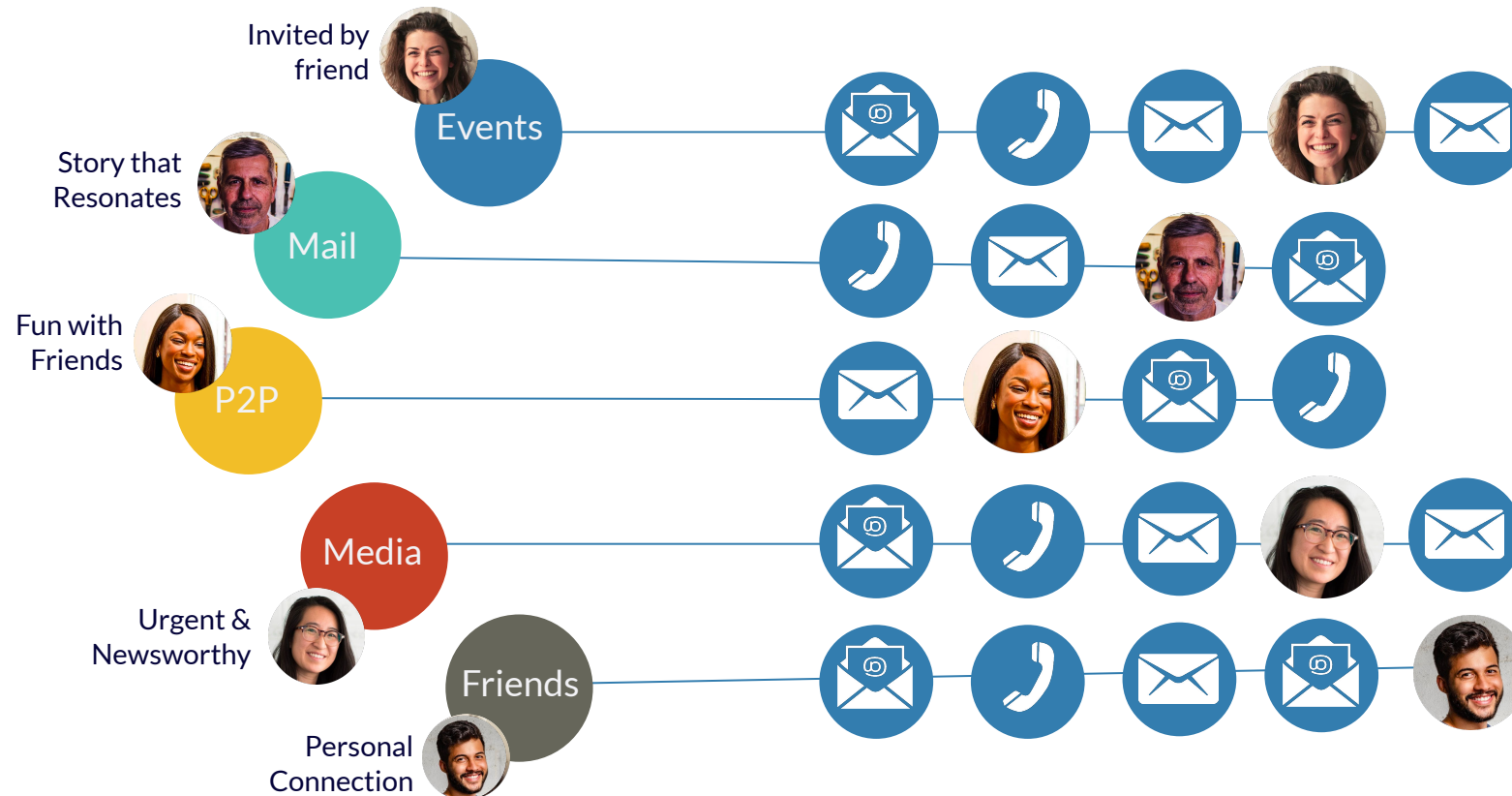


Donor/Prospect Acquisition

Personal. Based on Donor Timing

Retention & Cultivation

Connected to Intent. Driven by Donor Behavior.



A DONOR-CENTRIC APPROACH

The Responsive Framework



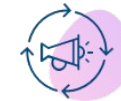
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Listen

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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 (3) 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.



RESPONSIVE FUNDRAISING

Example: *Donor Personas & Personalized Messaging*



Erika // New Mother



Cheryl // Former Teacher



Scott // Pastor



Suzie // Mother



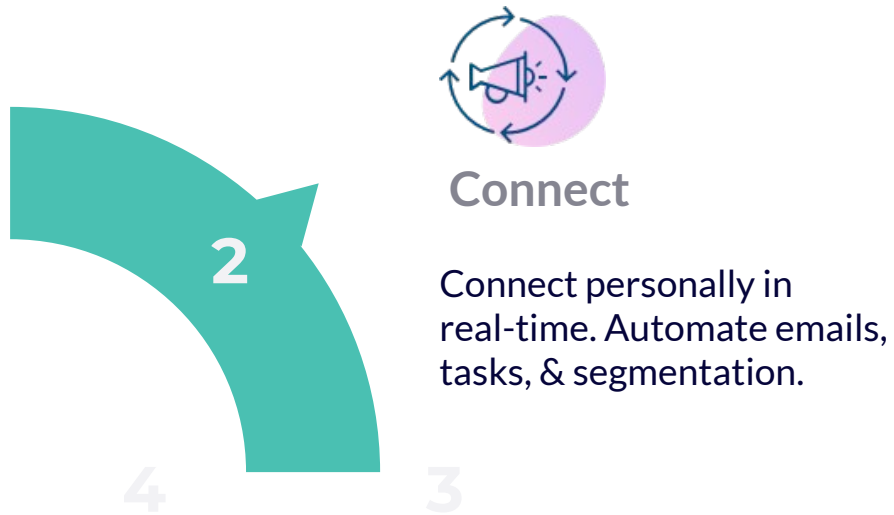
Abby // College Student



Jay // Business Owner

A DONOR-CENTRIC APPROACH

The Responsive Framework



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.

RESPONSIVE FUNDRAISING

Example: *Automated New Donor Onboarding Workflow*



First-Time Donor Journey



Add Tag: New Donor



Send Email: "Adoption Welcome 1"



Delay 3 Days



Assign Task: Intro Call
John Thomas | Due in 2 Days



Send Email: "Adoption Welcome 2"



Delay 5 Days



Send Text: Adoption SMS 1



Automated Letter: Adoption Mail Package

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!

RESPONSIVE FUNDRAISING

Example: *Donor Giving Milestone Campaign*








































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  
-  [Send Letter 'Thank You Letter'](#)  
-  Add Note: Major Giving Threshold reached  
-  Add: Susan's Major Donor Portfolio  
-  Set OnBoarding Status to: Complete  

A DONOR-CENTRIC APPROACH

The Responsive Framework

3



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

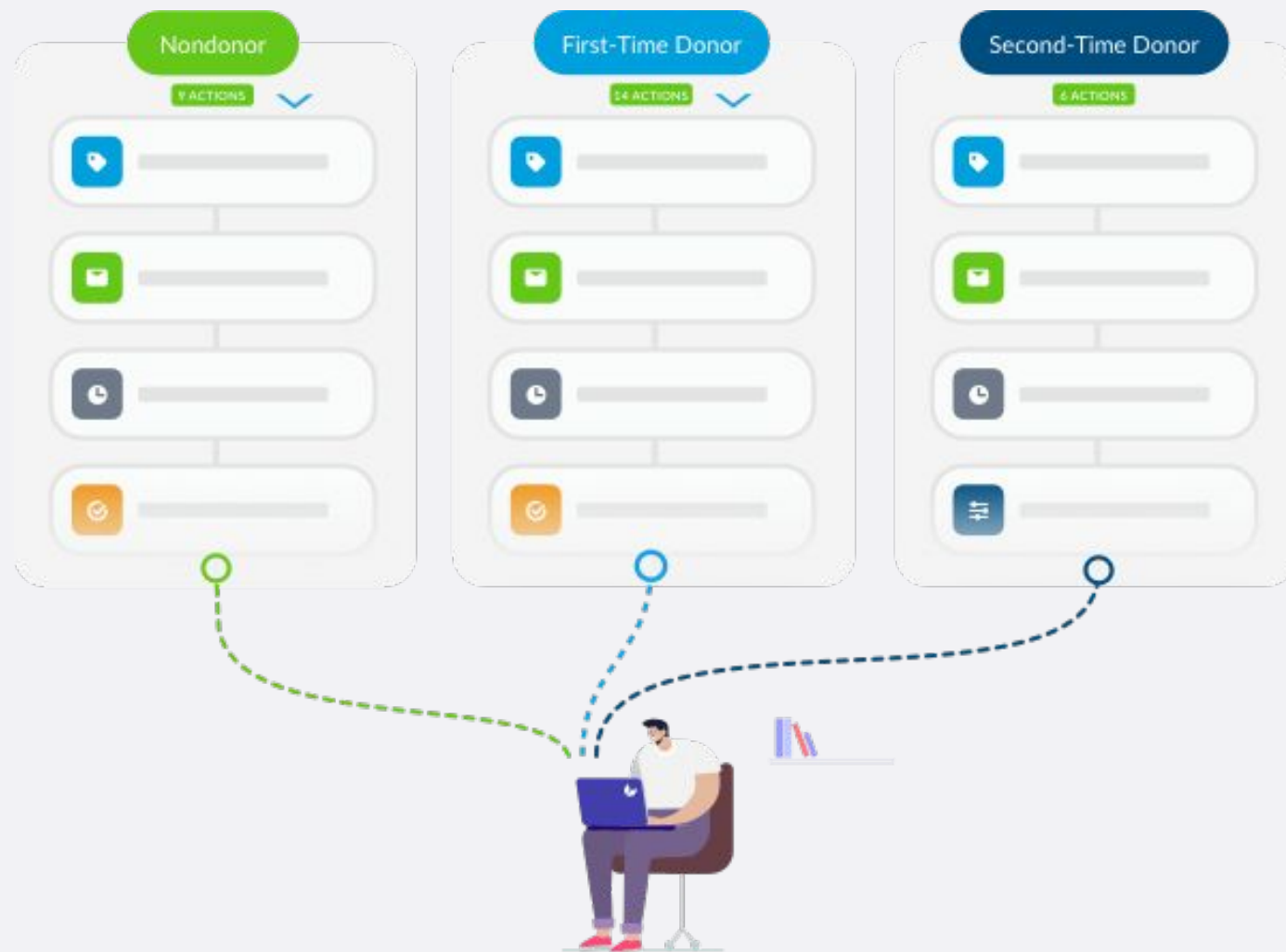
Each donor's journey is unique. Mapping these journeys let you identify key milestones for engagement.

Non-Financial Asks

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

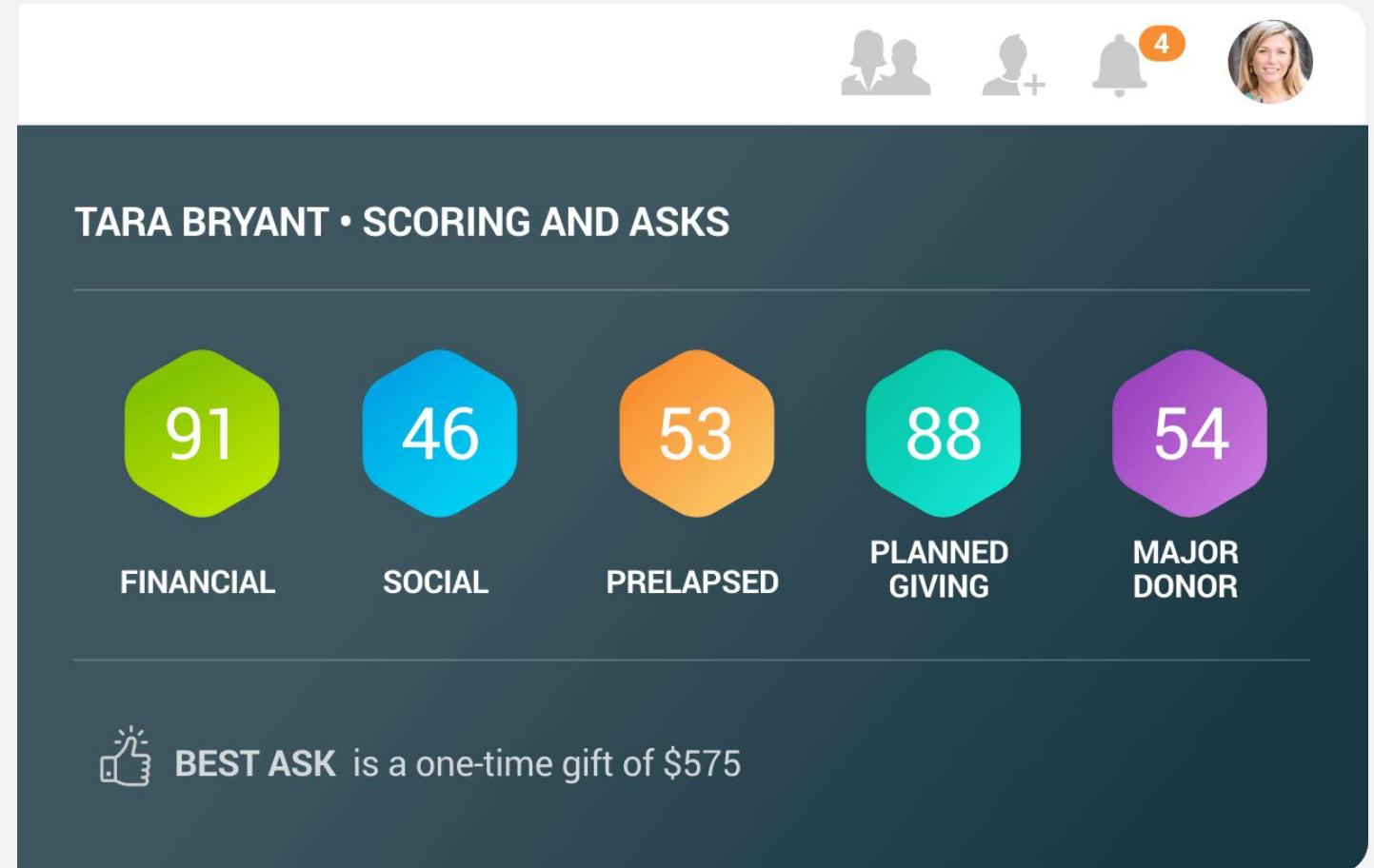
RESPONSIVE FUNDRAISING

Example: *Donor Journey Mapping & Dynamic Asks*



RESPONSIVE FUNDRAISING

Example: *Smart Gift Suggestions & Best Ask*



RESPONSIVE FUNDRAISING

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

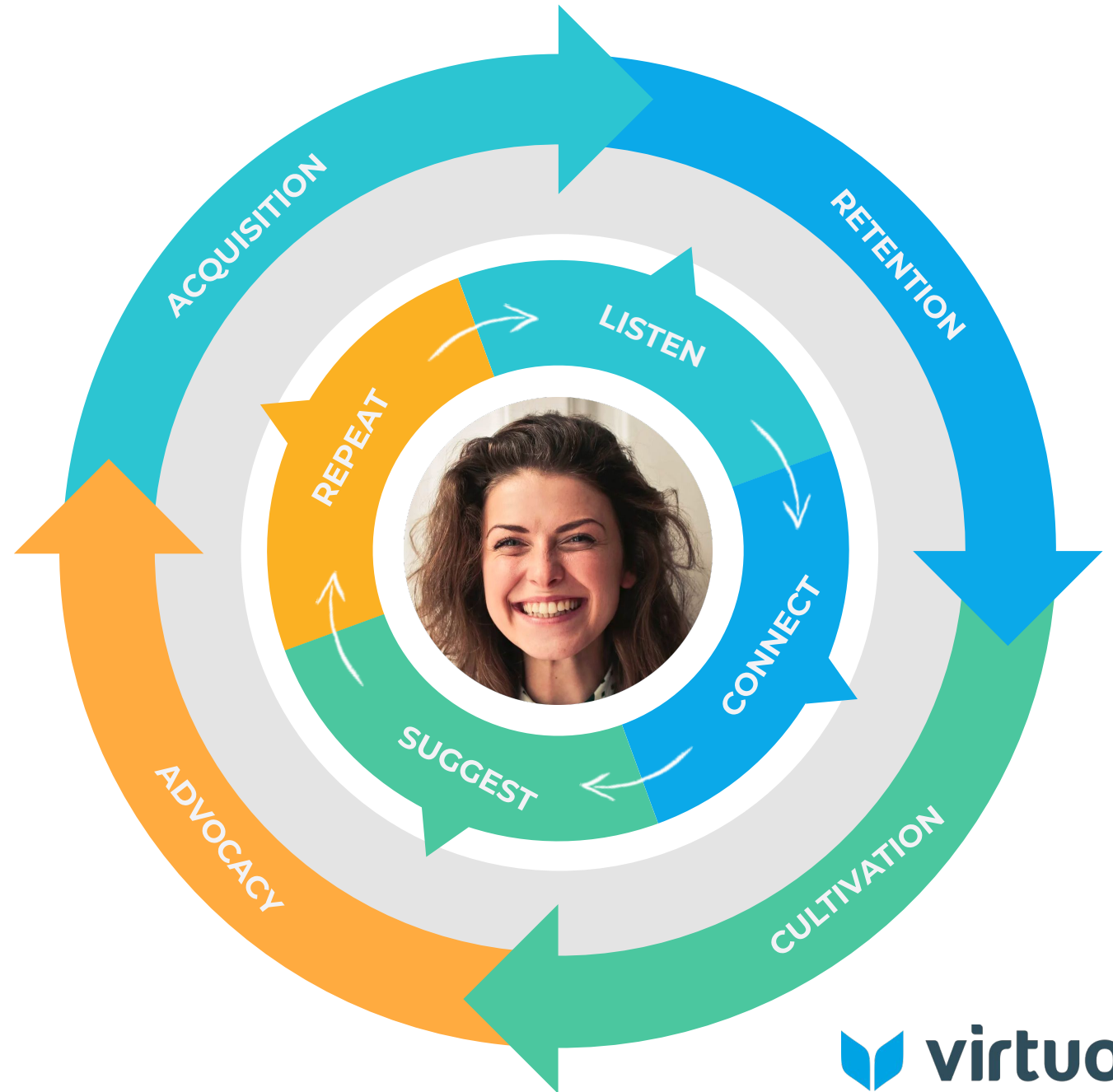
Acquisition, Retention, Cultivation

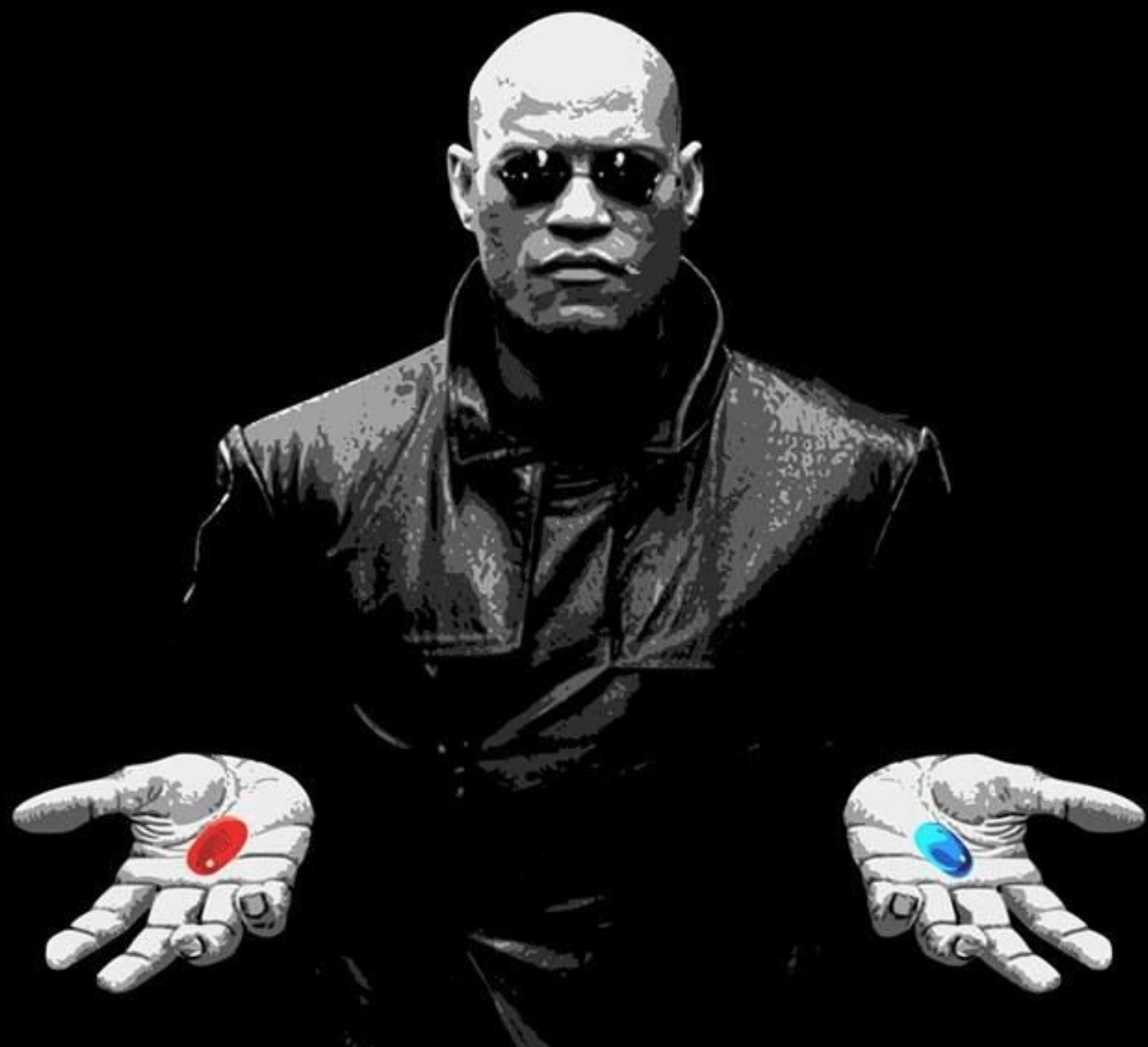
Dynamic Playbook

Personas, Campaigns, Multi-Channel,
Donor Journey

Technology Platforms

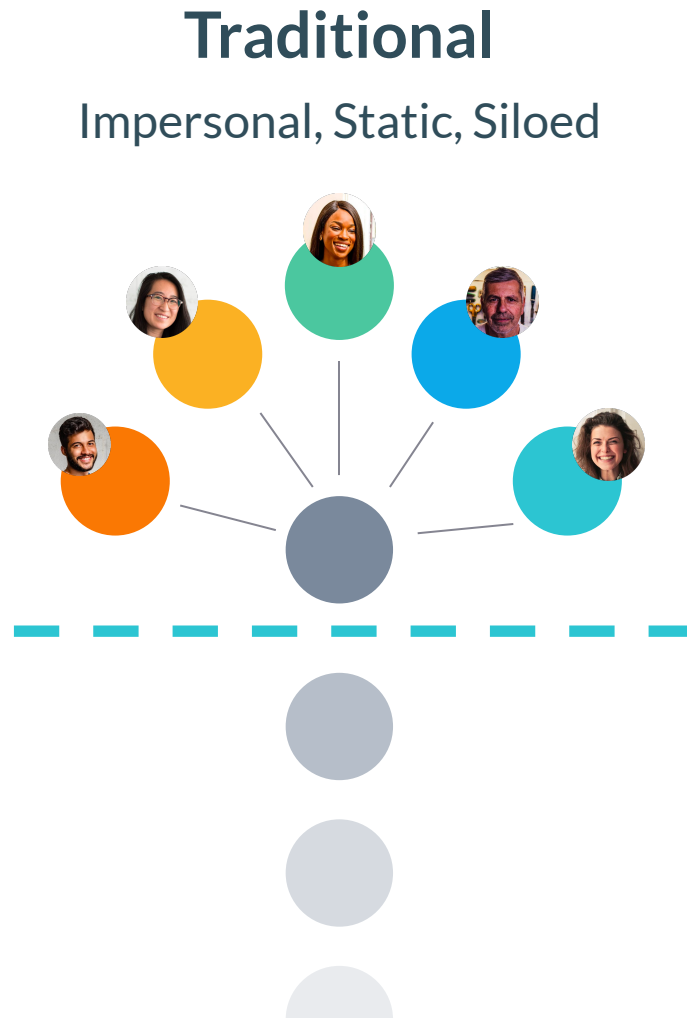
Responsive CRM, Automation, Smart
Giving, Email/Mail/Text, AI, Analytics



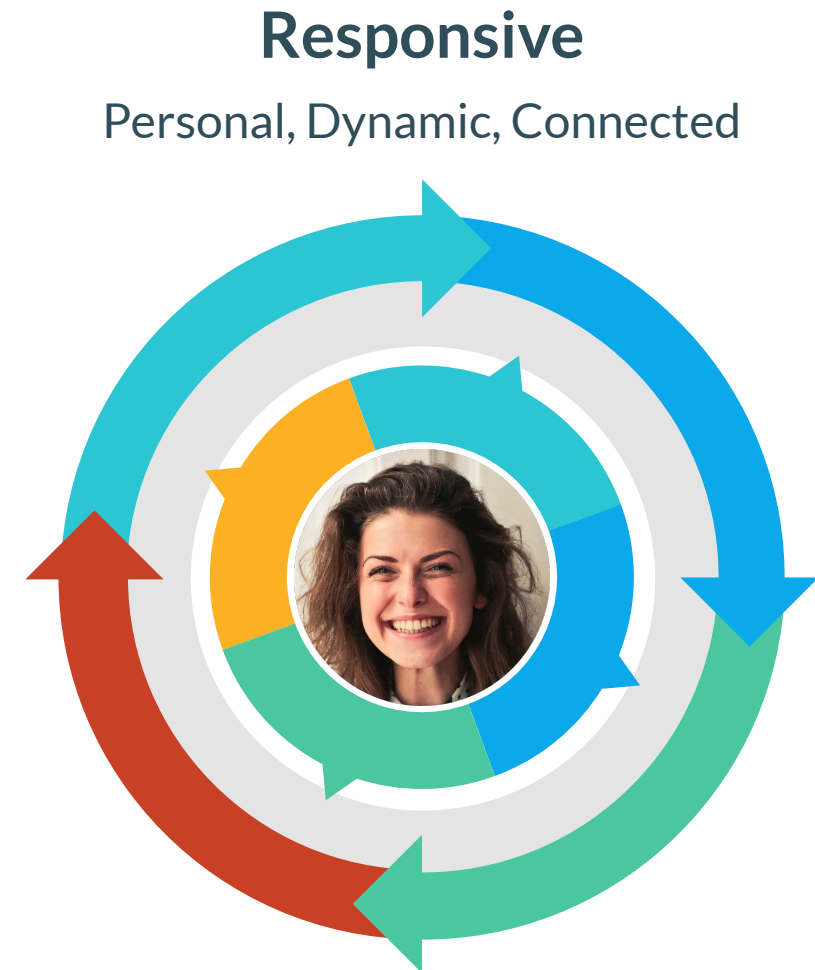


Your Nonprofit Has A Choice

Will you carry on or adapt your system to grow?



OR

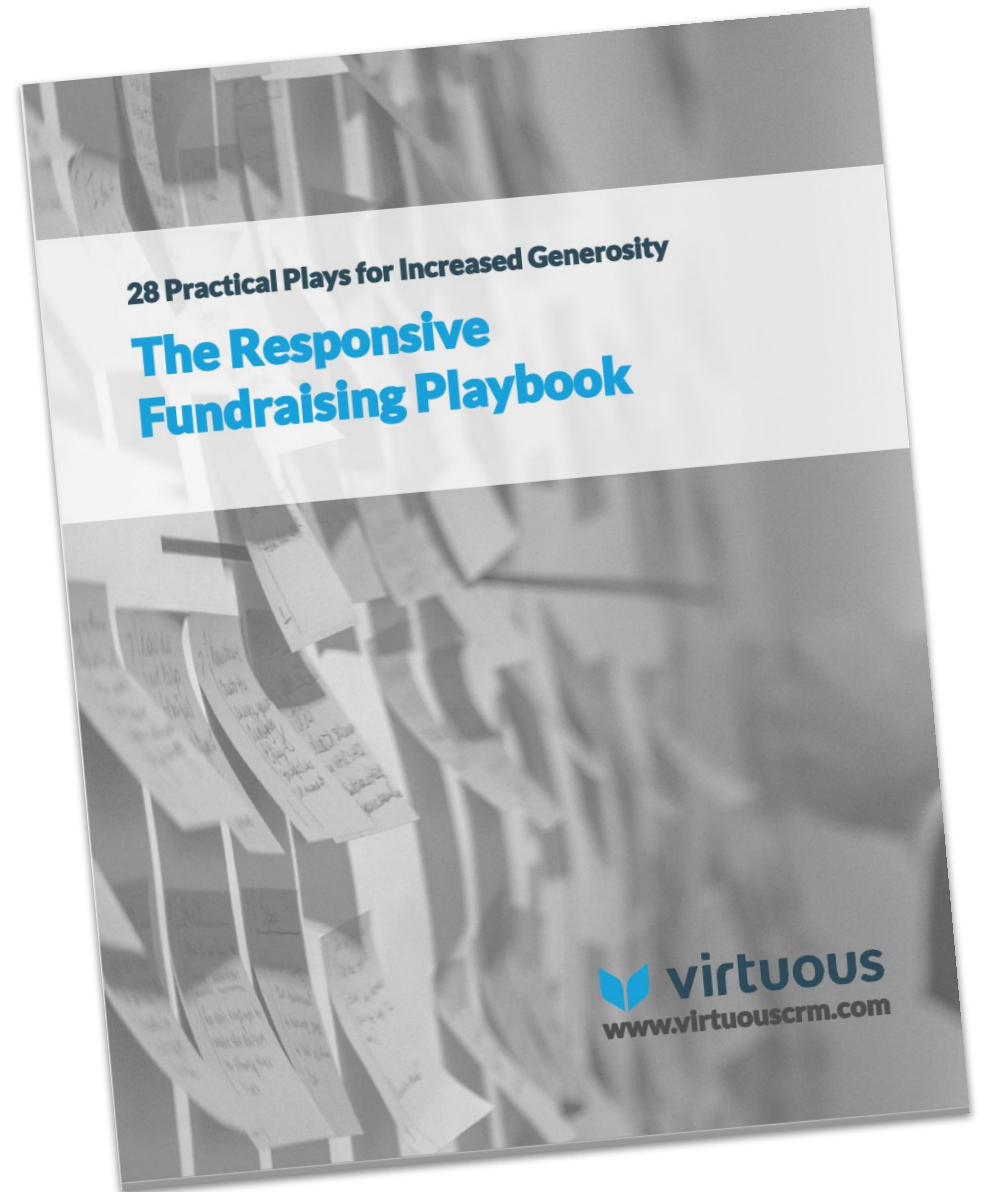




Offer: The Responsive Fundraising Pack

Send an email to responsive@virtuouscrm.com with subject line “Collaborative” and I’ll send you:

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





We are the responsive nonprofit's growth partner.

We equip nonprofits with:

- 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**

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2020

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