

The First 90 Days: How To Design Responsive, Multi-Channel Donor Journeys To Grow Donor Engagement



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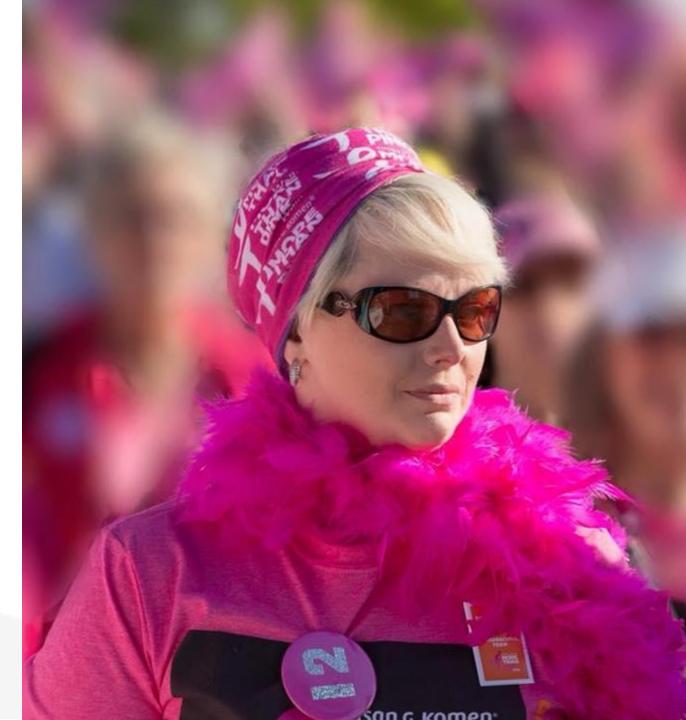




Giving is personal

Today's donors expect a **personal connection** to causes they care about.





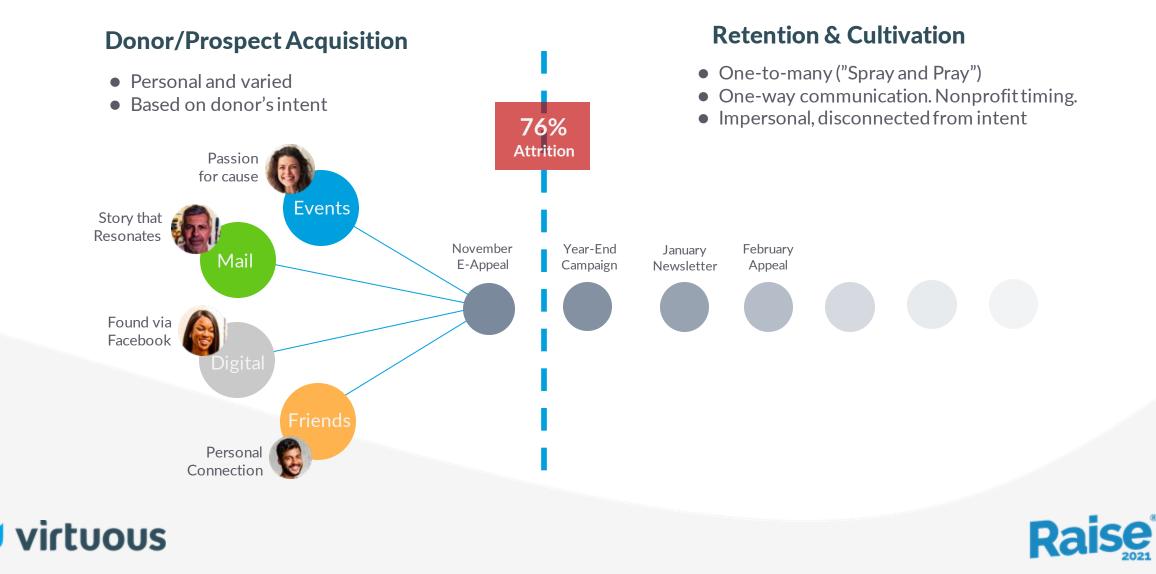
The Problem

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





Today's fundraising is largely impersonal



A Growing Generosity Crisis





The numbers ≈50%

Turn over in donors every year

≈25% Decrease in mid/low donors last decade

Why donors opt out

Inappropriate asks & impersonal messages

Lacking acknowledgement & transparency

Source: Managing Donor Defection by Adrian Sargeant





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



Paul Batalden
 MD, Researcher, Healthcare







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Agenda

- 1. Three (3) core factors that drive donors to give again
- 2. Why multi-channel cultivation is a must in 2021 and beyond
- 3. How to use responsive fundraising to design dynamic donor journeys at scale



Two important questions.



Two important questions What drives donor retention?



Two important questions What drives donor retention? How do we cultivate this?



The world you fundraise in has changed.





"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









What changed?

Shift from mass marketing to personal experiences.



Tailored to you

Curated content and experiences based on your interests.



Two-way, behavior driven

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



Personalization Everywhere Disnep audible (Kroger) STITCH FIX Spotify SUN BASKET NETFLIX

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The Insight

Donors continue to give when they feel **connected with** and **confidence in** an organization working on a cause they **care deeply about**.







Two important questions What drives donor retention? How do we cultivate this?





"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."

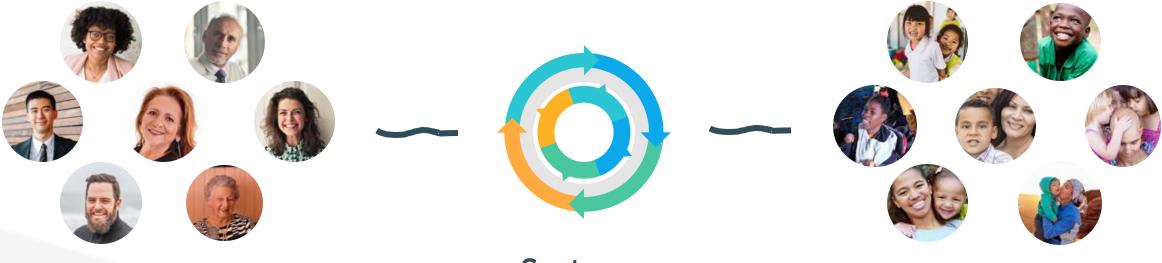


Eglantyne Jebb Founder of Save the Children



The First Principles of Fundraising

Connecting supporters with your story through systems



Systems

Campaigns, Processes, Habits, Metrics, Communications, Platforms

Supporters

Donors, Stakeholders,

Volunteers, Board, Staff

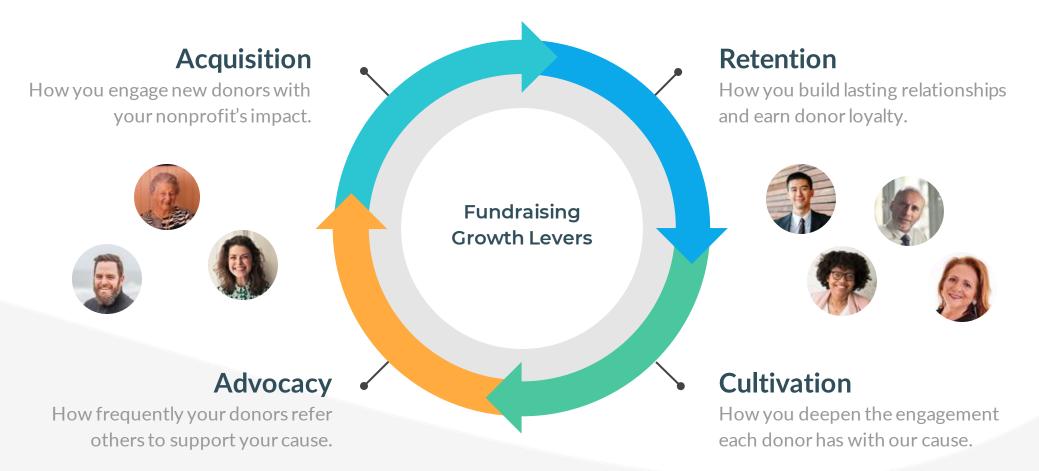
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Story

Mission, Impact, Purpose, Outcomes, Beneficiaries



The Fundraising Growth Model







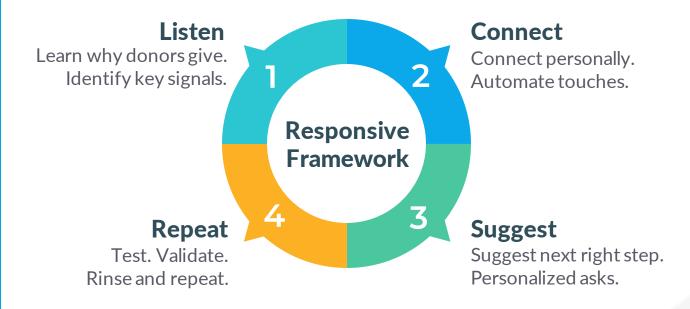
How are nonprofits accelerating their growth model and closing the gap with modern donor?



A Better Approach: Responsive Fundraising

Growing nonprofits are using responsive technology and tactics to **connect** personally with each donor.

The Donor-Centric Model





The Responsive Fundraising Framework





Connect

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



Suggest

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





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
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.
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.

Emma

Luke

AUDIENCE POLL:

Which of these donor signals are you listening for today?

- 0 None :/
- 1 Involvement
- 2 Involvement & Interest
- 3 All three!!

*Share your take in the GoTo chat panel





Example: Donor Personas & Personalized Messaging



Erika // New Mother





Cheryl // Former Teacher



Scott // Pastor



Suzie // Mother



Abby // College Student

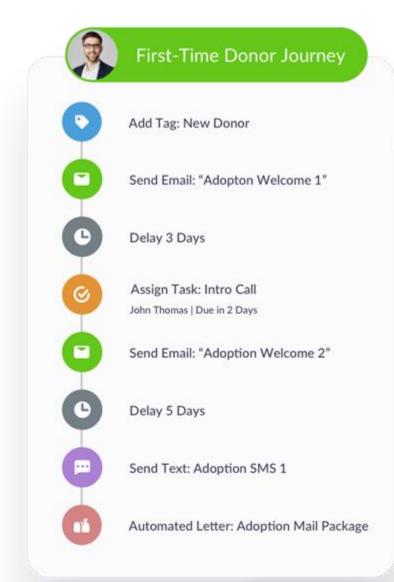


Jay // Business Owner



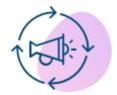


Example: Automated New Donor Onboarding Workflow



Raise





Example: Donor Giving Milestone Campaign



LTD GIVING > 1K Query: <u>Giving Milestones - LTD > 1k</u>			=
	CONTACTS 344 ACTIONS 14		
0	Task: Development Rep follow-up call David Cady Due in 5 days		=
•	Send 'Life-to-Date Giving \$1,000 (LTD Giving Milestone	Z	=
\bigcirc	Add Tag: Major Donor	Ľ	=
0	Delay 2 days	Ľ	=
	Send Letter 'Welcome Letter'	Ľ	=
0	Task: Director of Development Thank You Handwritten David Cady Due in 5 days		=
0	Delay 3 days	Ľ	=
	Send Letter 'Thank You Letter'	Z	=
0	Follow: David Cady	Ľ	=
	Send Letter 'Thank You Letter'	Ľ	=
	Add Note: Major Giving Threshold reached	Z	=
8	Add: Susan's Major Donor Portfolio	Z	=
	Set OnBoarding Status to: Complete		=





Example: Contextual Follow-up & Suggested 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 Fundraising Framework





Connect

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



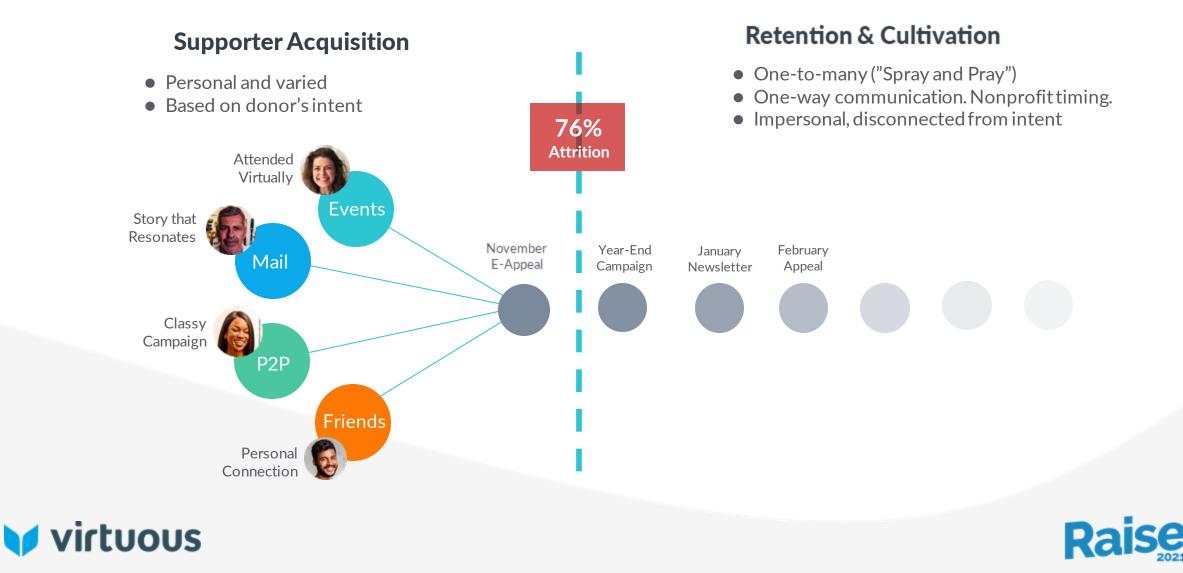
Suggest

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





Remember this ...



Imagine for a moment ...

Meet Lisa

Attended a virtual event





TY email with a survey on interests hank you call SMS from team Tea

Thank you call SMS from Program from team Team based on interests

2 days

SMS

Lisa receives multi-channel engagement

1 day

You track engagement on your website pages

Lisa Visits

1 day

Email w/ donation ask based on page Lisa visited

Lisa Gives!

Signs up as a recurring donor on your donation





Postcard closing the loop on impact

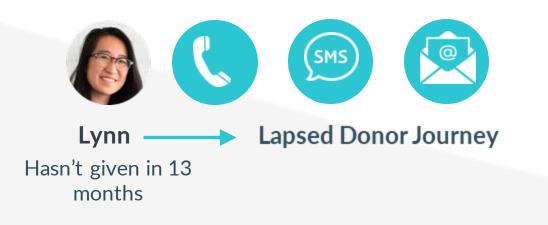
Automated donor journey. Multi-channel. Hyper personal.



What if ...









Responsive, dynamic campaigns

Donor/Prospect Acquisition

Personal. Based on Donor Timing

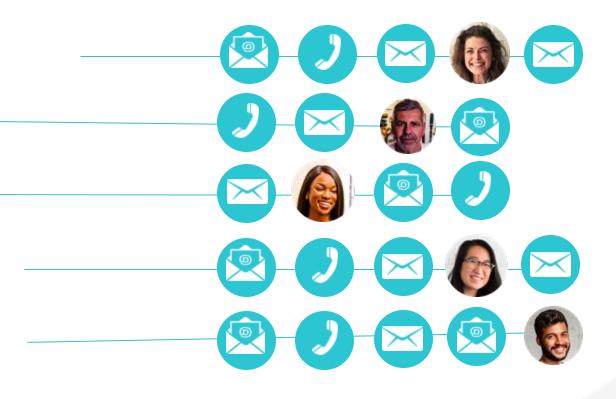
Retention & Cultivation

Connected to Intent. Driven by Donor Behavior.



Multi-channel. One conversation.

Growing nonprofits are using multi-channel communications to stay connected and **deepen engagement** with supporters.





AUDIENCE POLL:

Are you using multi-channel fundraising today?

- 0 Nope :/
- 1 Dabbling ...
- 2 Yes, but only with online acquired donors
- 3 Multi-channel all the way!!

*Share your take in the GoTo chat panel



Why multi-channel matters

The Insights

Multi-channel donors = 3x more

Digitally acquired donors are 3x more likely to become multichannel donors

Don't forget the phone

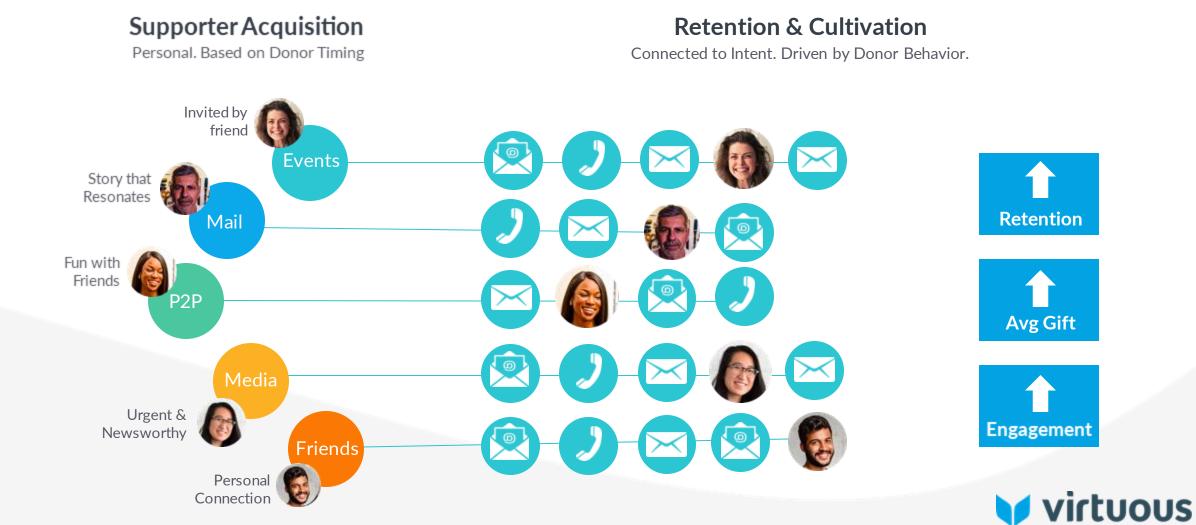
The Data

↑ 12% or more donor retention

virtuous

Sources: Penelope Burk's 'Donor Centered Fundraising', Aggregate Virtuous Customer Data, The State of Multi-Channel Communications

Responsive, multi-channel



Doctors Without Bor. 2 One final chance - They fled for their safety. What's new

Doctors Without Bor. 2 Only hours left this World Refugee Day - You only hav

Doctors Without Bor. 2 Today is World Refugee Day - Nearly 71 million forcib

It's Mary from Doctors Without Borders. We're short of our World Refugee Day goal, and COVID-19 has made this work so urgent. Donate now: https://bit.ly/3djTJJ4





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Today is World Refugee Day 102. NAME AND ADDRESS OF A DESCRIPTION OF A D Not these stations of the lower stations have a

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Rearly 71 million people are forcibly displaced around the world-the most in modern history.

Forced to fise violence, conflict, and persecution in their countries of origin, many end up stranded in overcificeded camps with little access to even the most basic services- and at particularly high risk of contracting COVID-18

The global sononavirus pendemic has compounded the already dra situations of many displaced perget. Many of the measures necessary to control the spread of COVID-18 are effecting or impossible in refugee camps. How can you resistent physical disturct when you water a cramped shelter with ten or more people? How can you wash your hands. without reliable access to soup and water?

Al Dectors Without Bonlare, we are committed to maintaining medical humanitation projects in more than 10 countries around the world despite the COVID-19 pandemic. Our top provide providing tee, high-quality medical name to the people who need it most -people like refugees, any/un seekers, migrante, and others who have been tyroed trum horse. We rely on supporters like pro--morylary people who care-ist help us deliver medical aid to three most in need. With an ranniadented amount of need on this World Refugee Day walve et a poel to raise \$240.000 by midnight tonight.

From forcibly shiplaced people in Onexice. Spris, and Tanzania to the nearly one million Rohingus refugees living in overcrowded camps in Bangradeeh, our teams are stoing everything they can to help:

We're distributing hygene kits in Brazil, setting up indiation units in Debuild, Kenyat's largest refugee camp; and tabling on the Malaysian government to repeat policies that interfers with the delivery of critical health care to refugees and asylum seekers. And with reports surfacing that the first case of COVO-19 has been detected among the Rohingu that the time book occurs of them are reading anong the memory infigures in Bangladeen, our teams are reading to prover the spanial of the contractions and provide care. Bill, the challenges are many, unpredictable, and nearly unprecedented in scope, and our teams are being called on to do move that own before. Meeting this \$240,000 goal by midnight could not be more important.

We count on support from carring people like you who want to ensu everyone has access to lifesoving medical care, and we hope you'll give Inday. Please give now on this World Rafugee Day to help our teams



For people forced to five their homes, COVID-19 is another sheadly obstacle on their journey. Help save lives: Make a gift for World Refugee Day.

DONATE NOW

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2 HOURS

TEXT 1

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Time is running out to make a illusaving pff to Dockets Without Bonters the World Refugee Day, to we sentised to fail you where we stand. With just house the until our midnight deadline, we're still \$50,000 short of our psel.

Our teams are reciring to provide medical care to the millions of refugees and other displaced people who have been juit at even greater risk by the COVID-18 pandomic. This global health crisis is unprecedented—and as are the needs on the ground.

As they fee violence, conflict, persecution, and other hardphaps in their home contriers, velugees and other displaced people face unsign tasks. Many and up strated or controlled, unanatary upons share essential services are limited or nonexate in the ingeneet.

Helping refugees is a core tenet of our medical humanitarian workand that's why we've recing to reach our \$240,000 goal before midnight this World Refugee Day.

With the commonly-spendenic compounding other health crises, your gift has never been needed more. Donatic new to bells us meet our World Refuges Day pool before molecular and smooth medical cars for people to the more and afters to need.



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Only hours left this World Refugee Day

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GIVE NOW TO SAVE LIVES

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ANF





DONATE NOW

World Refugee Day ends in just five hours.

Donate now to help Doctors Without Borders provide illesaving medical care to refugees and other displaced people impacted by COVID-19 and urgently in need of care around the world.





For people forced to flee their homes, COVID-19 is another deadly obstacle on their journey, Help save lives; Make a gift for World Refugee Day.



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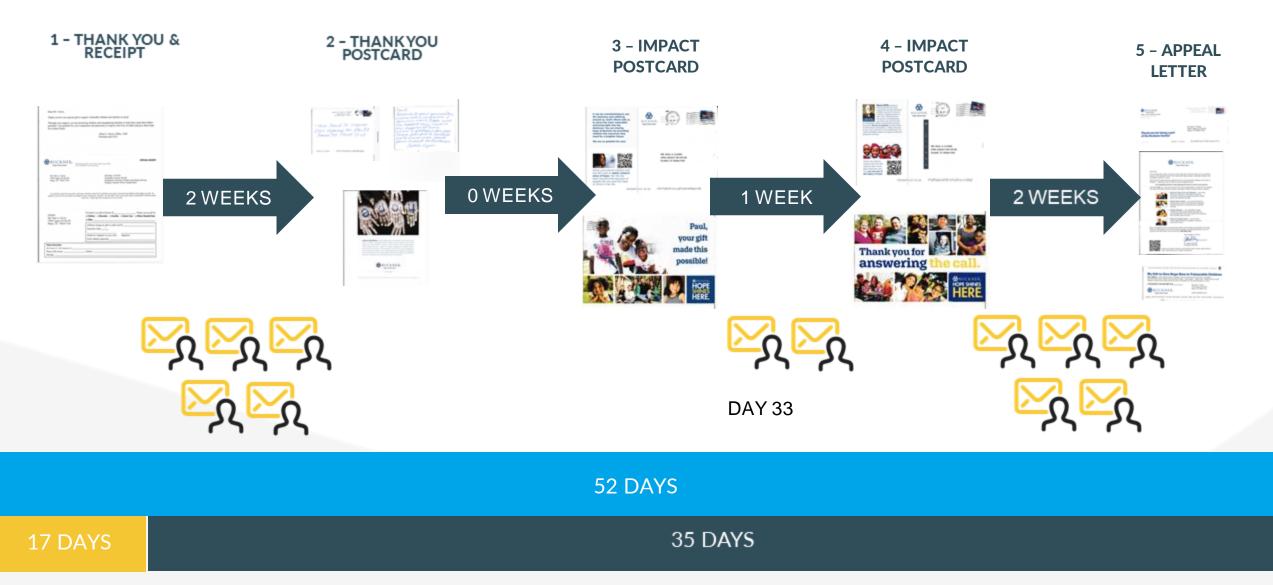
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Raise

Case: Buckner International









Multi-Channel Fundraising

- 1) Email your offline donors and mail your online donors
- 2) Create an online and offline welcome series
- 3) Call all donors within 48 hours of a donation
- 4) Say "thank you" if/when you do
- 5) Ask for emails on direct mail reply devices





BASIC

Multi-Channel Fundraising

POLANCED

- Send text messages within your 90-day cultivation
 Send a postcard 2-3 weeks before an online campaign
- 3) Automate thank you voicemails
- 4) Show Facebook ads to direct mail recipients 2-3 weeks before and after they get an appeal
- 5/i&oodsemails 2 weeks before and after an appeal Raise

Two important questions What drives donor retention? How do we cultivate this?



Your Nonprofit Has A Choice Will you carry on or adapt your approach for growth? **Traditional** Responsive Disjointed, Static, Siloed Dynamic, Personal, Multi-Channel OR **virtuous**



The Recap ...

Retention = Care X Connection X Confidence
 Responsive = Listen, Connect, Suggest
 Multi-Channel, One Conversation

Audit 90-day new donor communications
 Adjust based on learnings
 Test, measure, iterate, grow!

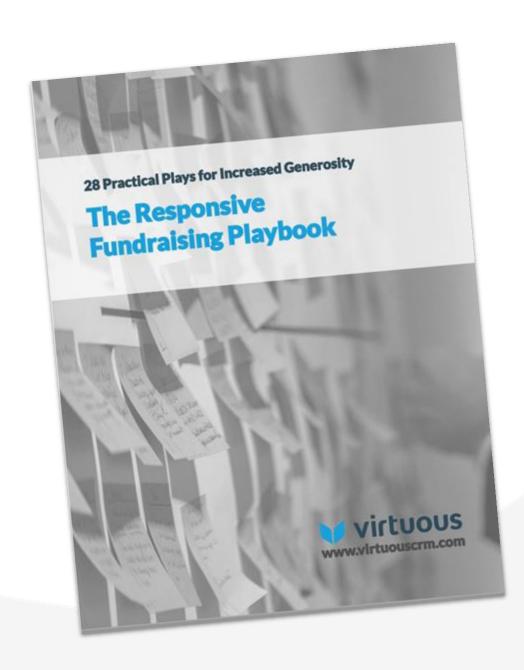


Offer: The Responsive Fundraising Pack

Send an email to **responsive@virtuous.org** with subject line "**Raise**" and I'll send you:

- A 30-minute video showcasing the why and how of responsive fundraising
- The 100+ Page Responsive Fundraising
 Blueprint & Playbook
- A self-paced Responsive Assessment to benchmark your nonprofit's fundraising

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*Share yours in the chat panel





A growth partner for nonprofit teams

Virtuous is a software company committed to helping nonprofits grow generosity.

From responsive fundraising platforms and playbooks to hands-on support from real people who care about your success.





Leading nonprofit teams trust Virtuous



Virtuous