



**the outcomes  
conference**

*therefore* ►



# Retain Donors with Great First-Year Communications

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# Goals for Today



1. Create "wow" moments for donors to increase trust and build deeper relationships.
2. Develop a welcome series that converts into a second gift.
3. Build a first-year communications plan that retains more donors.

<https://nonprofitfundraising.com/trust/>



## Copy document

Would you like to make a copy of **Communications Planning**?

Make a copy



<https://nonprofitfundraising.com/trust/>

2019



2023

11.8%



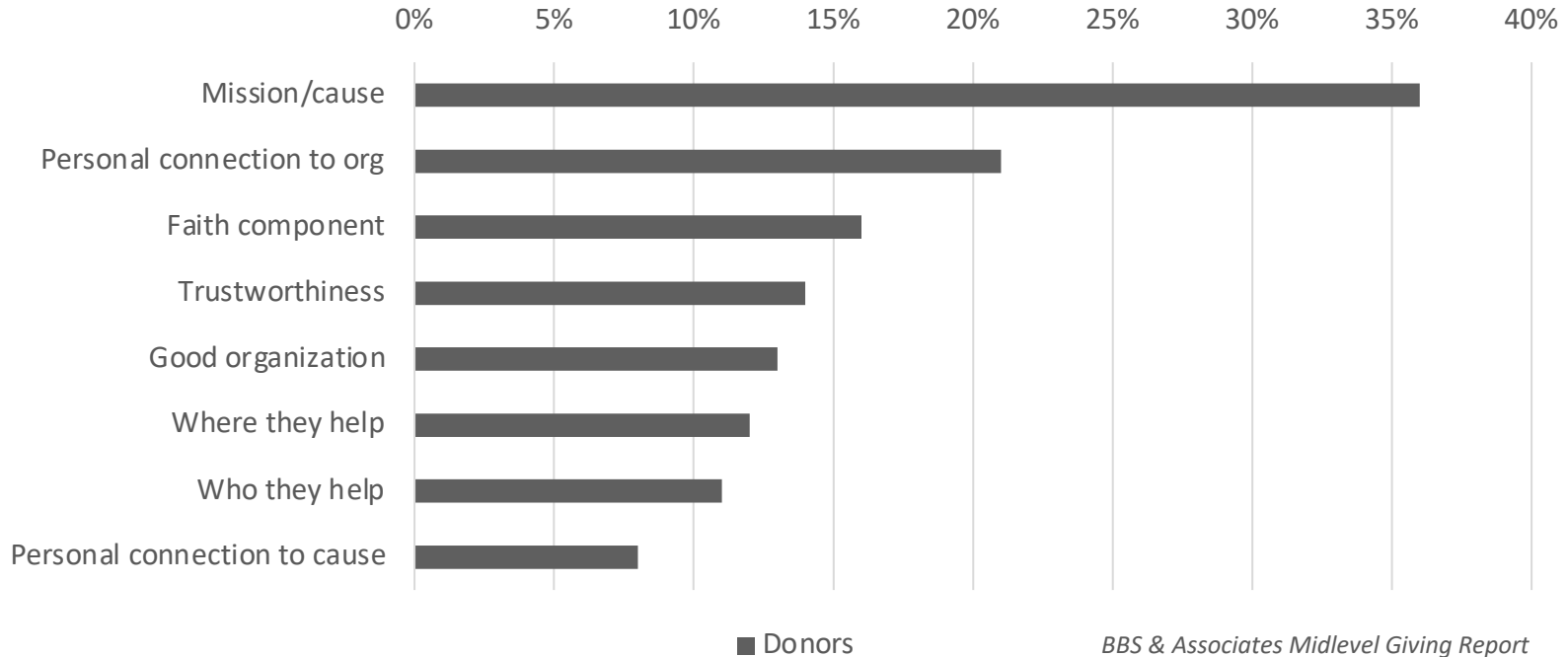
24.1%

65.9%



86.3%


## Why do midlevel donors give?



*BBS & Associates Midlevel Giving Report*

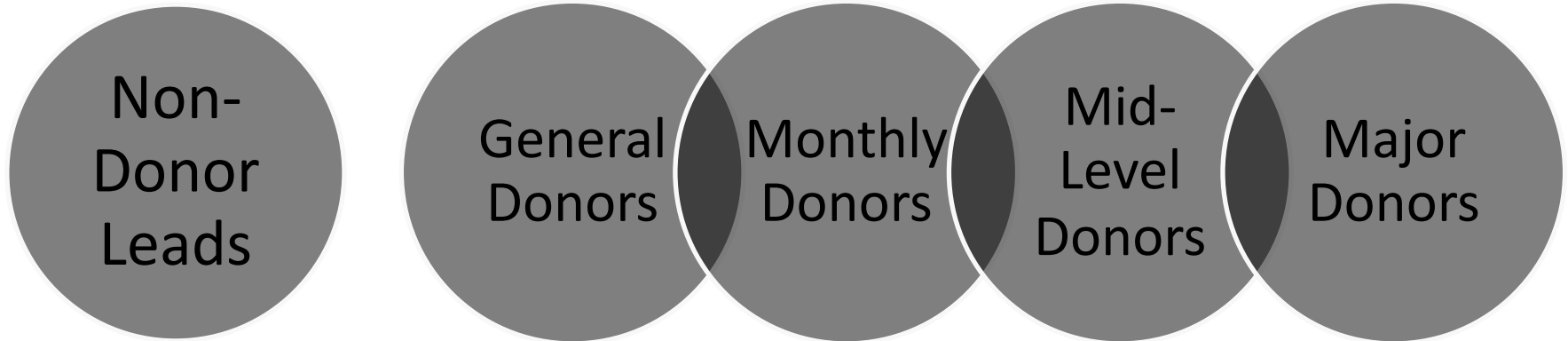
DONOR RETENTION

# PART I: DONOR TYPES





# Segmentation



# How do we segment our donors?

	Get on the List	Largest Single Gift (LSG)	Cumulative Giving (12 mo)
New Lead	Signup for email list		
General	Donate		\$0-\$999
Monthly	Recurring Gift		
Midlevel	Donate/Upgrade	\$750	\$1,000-\$4,999
Major	Donate/Upgrade	\$2,500	\$5,000+

# Activity: Segments



- Open the Worksheet
- Go to the Segments sheet
- Identify the segments for your organization

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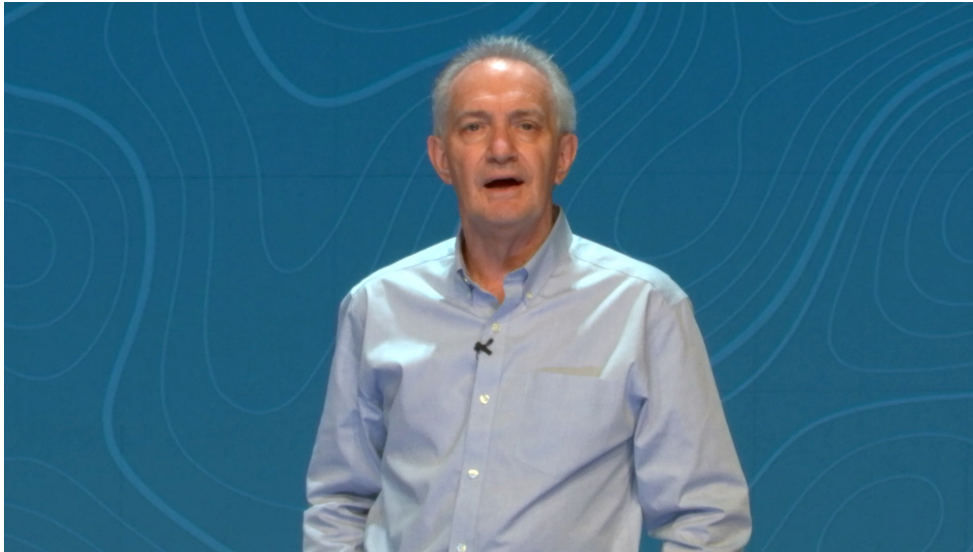
# PART II: "WOW" MOMENTS



# What is a “Wow” Moment?

- Surprise & delight donors
- Examples
  - Personalized welcome video
  - Unexpected tokens of gratitude
  - Hands-on experiences

# Personalized Video

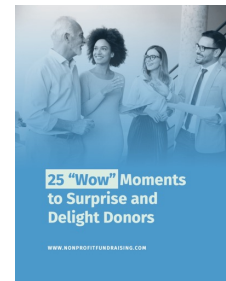


# Unexpected Token



# “Wow” Moment Examples

- Personalized video messages
- Exclusive behind-the-scene tours
- Donor recognition wall
- Impact stories
- Surprise thank-you calls
- VIP event invitations
- Donor spotlights
- Hands-on experiences
- Customized impact reports
- Annual appreciation events
- Collaboration opportunities
- Unexpected tokens of gratitude
- Personalized donor journeys
- Ambassador programs
- A “day in the life” experience
- Mentorship opportunities
- Custom artwork
- Donor appreciation videos
- Community spotlights
- Naming opportunities
- Access to exclusive content
- Tailored volunteer opportunities
- Gratitude events
- In-person or virtual meet-and-greets





# Attrition Killer



# Activity: “Wow” Moments



- Open the “Wow” Worksheet
- Identify resources
- Write three “Wow” moments for each donor segment

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# Activity: “Wow” Moments



	A	B	C	D	E	F
1	<b>Resource Name</b>	<b>Created By</b>	<b>Assigned To</b>	<b>Status</b>	<b>Segment</b>	<b>Timing</b>
2	<i>Magnet</i>	<i>Creative Team</i>	<i>Donor Ops</i>	<i>Being Created</i>		<i>3-5 business days after first donation</i>
3	<i>Phone call</i>	<i>Donor Relations</i>	<i>Donor Relations</i>	<i>Script ready</i>		<i>1-2 business days after first donation</i>
4	<i>Personalized video</i>	<i>Donor Rep</i>	<i>Tom F.</i>	<i>Script ready</i>	<i>Mid, Major</i>	<i>21 days after first donation; once per year</i>
5	<i>Handwritten card</i>	<i>Donor Relations</i>	<i>Volunteers</i>	<i>Completed</i>	<i>General, Monthly</i>	<i>1-2 business days after first donation; 8 months after first donation</i>
6	<i>Handwritten card</i>	<i>Donor Relations</i>	<i>Tom F.</i>	<i>Completed</i>	<i>Mid, Major</i>	<i>1-2 business days after first donation</i>
7	<i>Handwritten card</i>	<i>Donor Relations</i>	<i>Julia T.</i>	<i>Completed</i>	<i>Mega, Corporate</i>	<i>1-2 business days after first donation</i>
8						
9						
10						

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# PART III: WELCOME SERIES



# Welcome Series Goals

	Welcome	Create Trust	Engagement	Get a Gift	Convert a Second Gift	Gather Information
New Lead	X	X	X	X		X
New Donor	X	X	X		X	X
Monthly Donor	X	X	X			X

# Second Gift Strategy



<https://bloomerang.co/blog/why-your-nonprofit-needs-a-second-gift-strategy/>

# Elements of a Warm Welcome

- Welcome letter & receipt (Mail)
- Email welcome series
- Phone call
- Handwritten thank you card
- Monthly donor - welcome kit (Mail)

# Post-Gift Letters Example

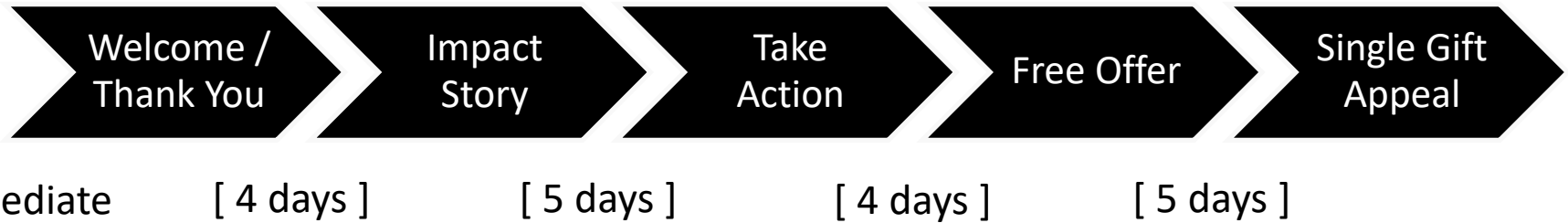
- First Donation: Welcome Letter
- Second Donation: Gratitude
- Third Donation: Monthly Giving Ask



# Types of Welcome Series Emails



# Email Welcome Series Flow



# Activity: Welcome Series



- Pick a donor segment
- Complete the Welcome Series Planning Sheet

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	Email #1		Email #2		Email #3		Email #4		Email #5
New Lead Series	Thank you & download link	Wait 5 days	Impact Story	Wait 5 days	Free Offer	Wait 5 days	Video Impact Story	Wait 5 days	Appeal
New Donor Series	Thank you & download link	Wait 5 days	Impact Story	Wait 5 days	Survey	Wait 5 days	Prayer Request	Wait 5 days	Appeal
New Lead Series		Wait 5 days		Wait 5 days		Wait 5 days		Wait 5 days	
New Donor Series		Wait 5 days		Wait 5 days		Wait 5 days		Wait 5 days	
New Monthly Donor		Wait 5 days		Wait 5 days		Wait 5 days		Wait 5 days	
New Midlevel Donor		Wait 5 days		Wait 5 days		Wait 5 days		Wait 5 days	



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# PART IV: FIRST-YEAR PLAN

## What is a First-Year Communications Plan?

- Communications received in year one
- Vital to prevent poor overlap or no communications
- Should be customized for each segment
- Foundation for future years

# Developing Your Comms Plan



# Set Goals

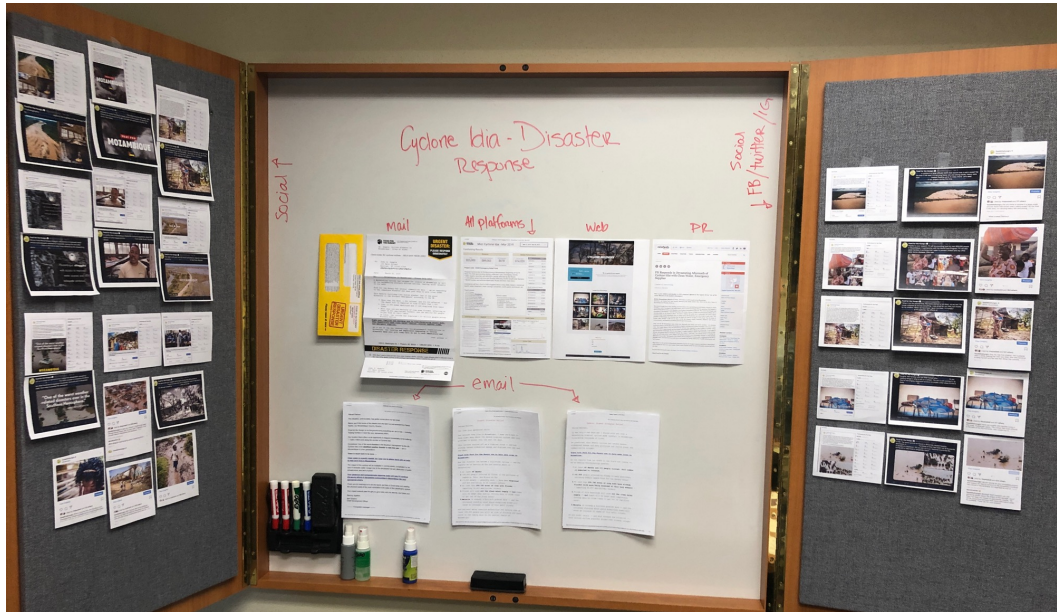
1. Build / transfer trust
2. Convert leads to first gift
3. Show gratitude
4. Convert first-time donors to second gift
5. Increase donor retention
6. Upgrade donors
7. Reactivate lapsing donors



# Choose Channels

- Email
- Mail
- Phone
- Handwritten Cards
- Tokens of Appreciation
- Text Message

# Communications Audit



## Activity: First-Year Communications Plan

- Pick a donor segment
- Complete the First-Year Communications Plan

<https://nonprofitfundraising.com/trust/>







CHRISTIAN LEADERSHIP  
ALLIANCE