

Data Strategy Forum



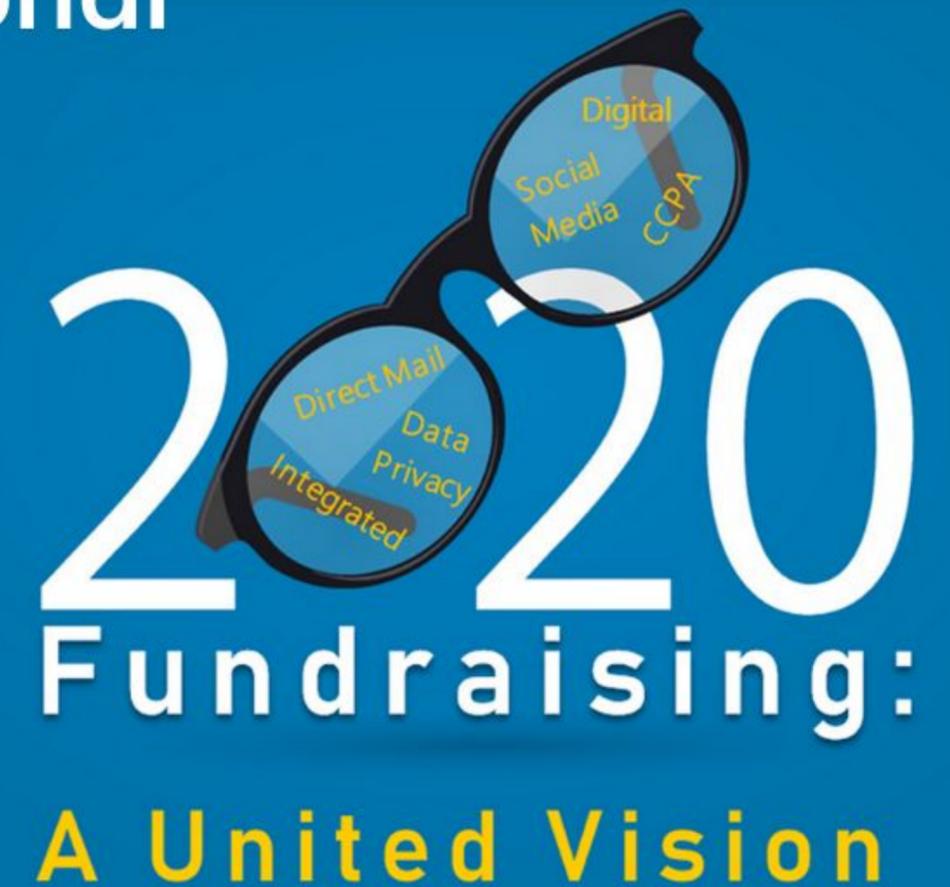
Responsive Fundraising: Creating Personal Relationships with Donor at Scale



Gabe Cooper
CEO
Virtuos



Sponsored by:



Tuesday, October 13 | 3:15 - 4:00 PM EDT



We are the responsive nonprofit's growth partner.

We equip nonprofits with:

- An integrated software **platform** built by fundraisers for fundraisers.
- A modern fundraising **playbook** designed to build lasting relationships with today's donor.
- Hands-on support and insights delivered by real



NONPROFIT CRM

Turn data into deeper donor relationships



SIGNALS

Data-driven donor insights



MARKETING

Email, mail & campaign tools



GIVING

Frictionless donation experiences



AUTOMATION

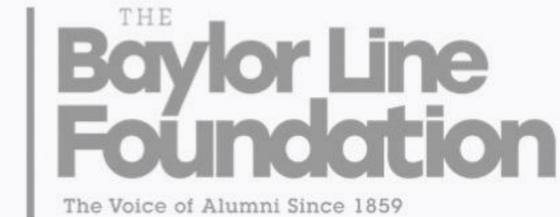
Multi-channel connections at scale

Learn more at **VirtuousCRM.com**

people who deeply care about your success.
Data Strategy Forum



Thousands of Leading Fundraisers Trust Virtuous







GIVING IS DEEPLY PERSONAL

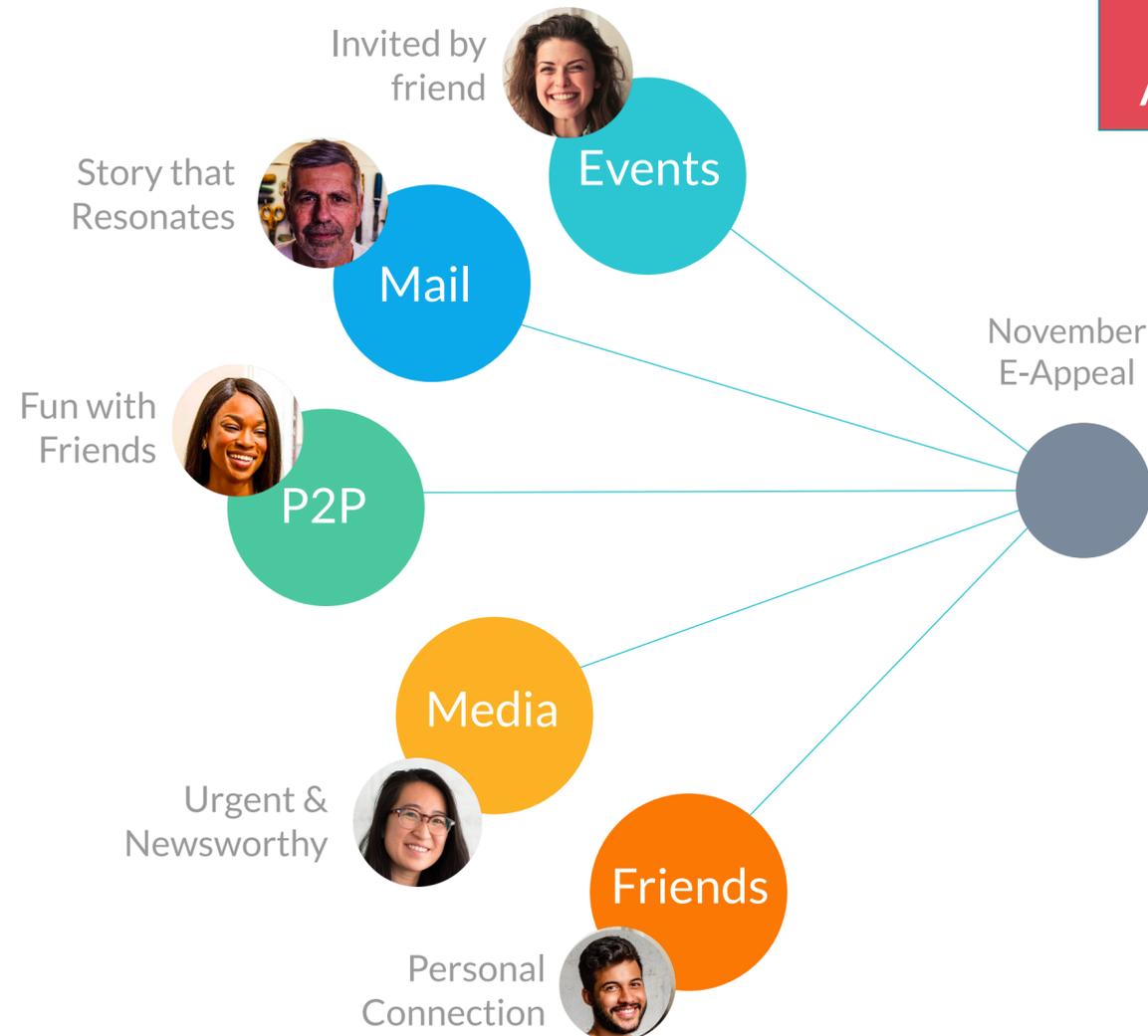
The Problem

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

Traditional Fundraising is Largely Impersonal

Donor/Prospect Acquisition

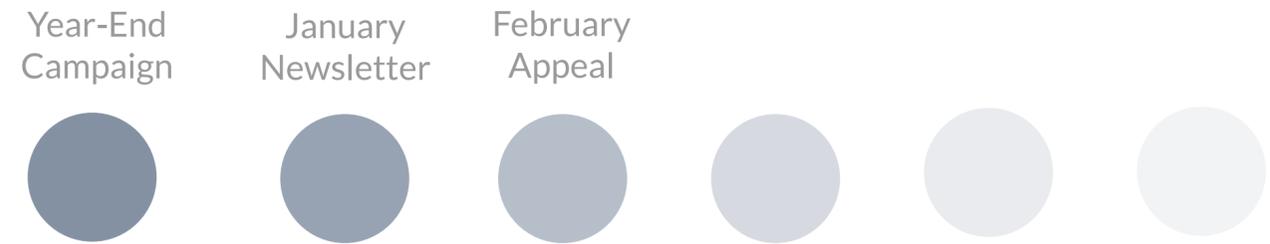
Personal. Varied. Based on Donor Timing



76%
Attrition

Retention & Cultivation

Disconnected from Intent. Impersonal. Nonprofit Timing.



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



Source: Managing Donor Defection by Adrian Sargeant

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

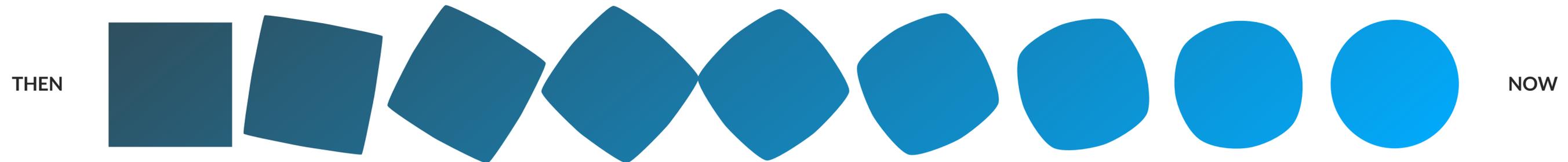
Poor & unhelpful communication

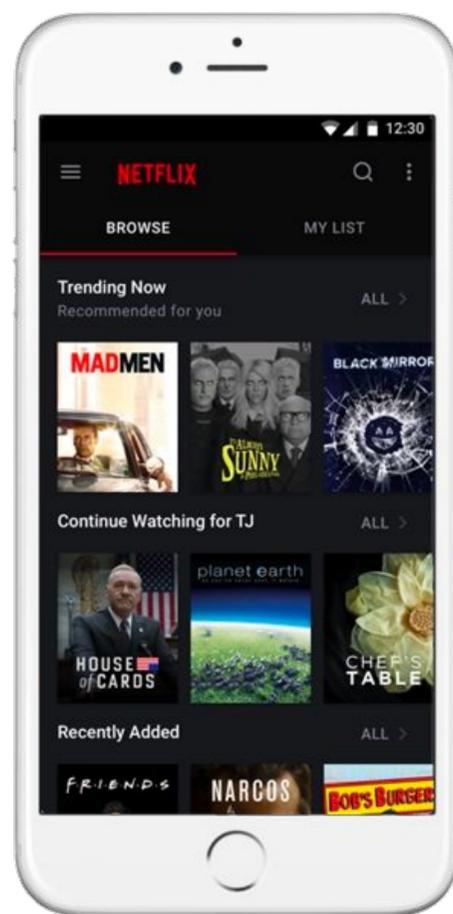
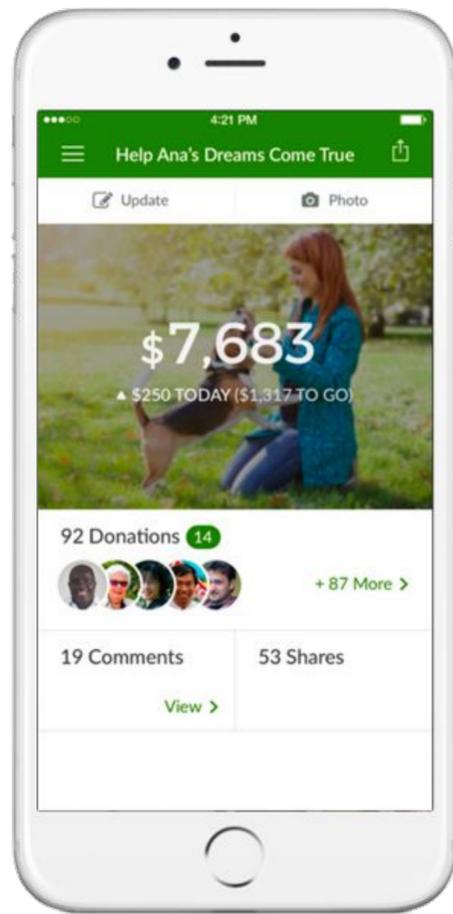
“Every system is perfectly designed to get the results it gets.”



— **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

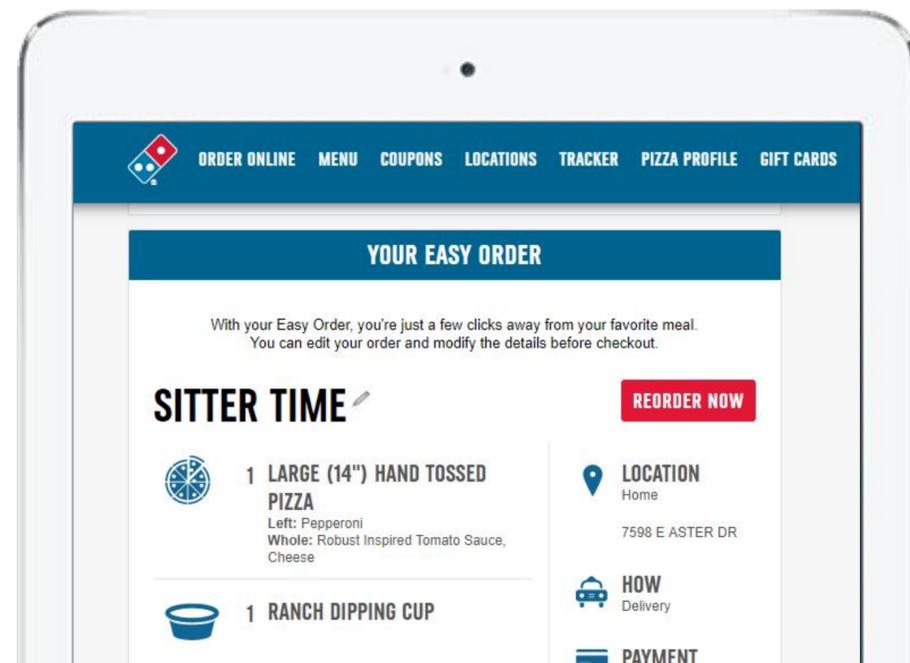
Curated content and experiences based on your interests.

Based on Your Community

Personalized and connected to your network and activity.

Two-Way, Behavior Driven

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





Personalization Everywhere

audible 



Disney


STITCH FIX






 Spotify

 SUN BASKET



NETFLIX

Today's donor expects a personal connection to causes they care about most.

A microscopic view of several COVID-19 virus particles, showing their characteristic spherical shape and surface covered in red, spike-like proteins. The background is a dark, reddish-brown color.

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**?



“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

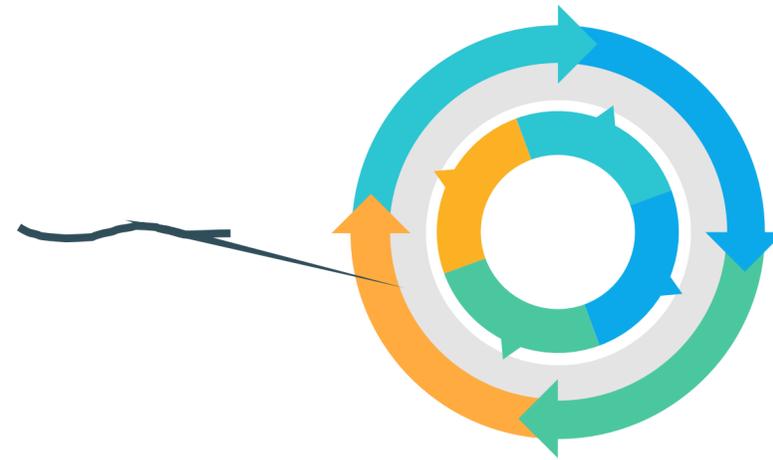
The First Principles of Fundraising

Connecting supporters with your story through systems



Supporters

Donors, Stakeholders,
Volunteers, Board, Staff



Systems

Campaigns, Processes, Habits,
Metrics, Communications, Platforms

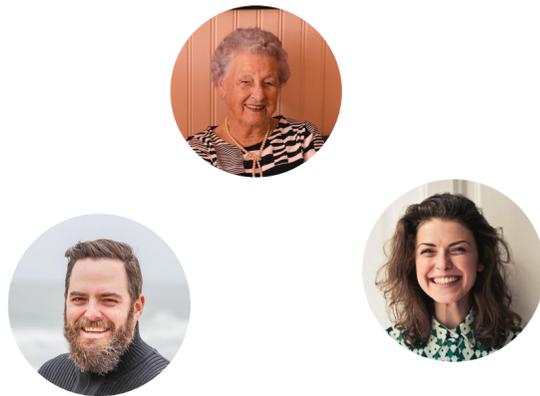


Story

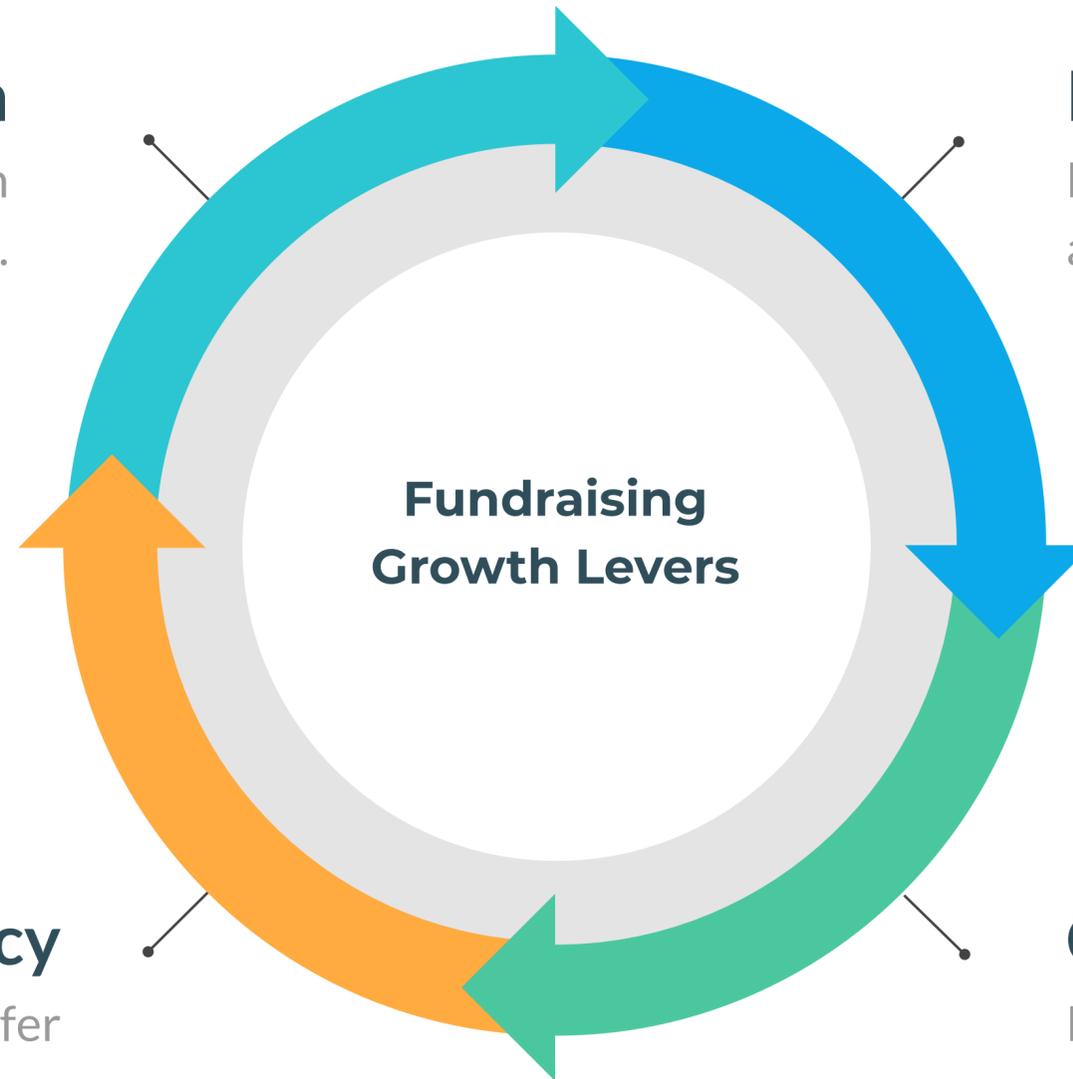
Mission, Impact, Purpose,
Outcomes, Beneficiaries

The Fundraising Growth Model

Acquisition
How you engage new donors with your nonprofit's impact.



Advocacy
How frequently your donors refer others to support your cause.



Retention
How you build lasting relationships and earn donor loyalty.



Cultivation
How you deepen the engagement each donor has with our cause.

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

Closing the Gap Requires Responsive Fundraising

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



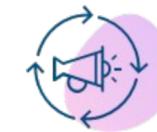
Listen

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.



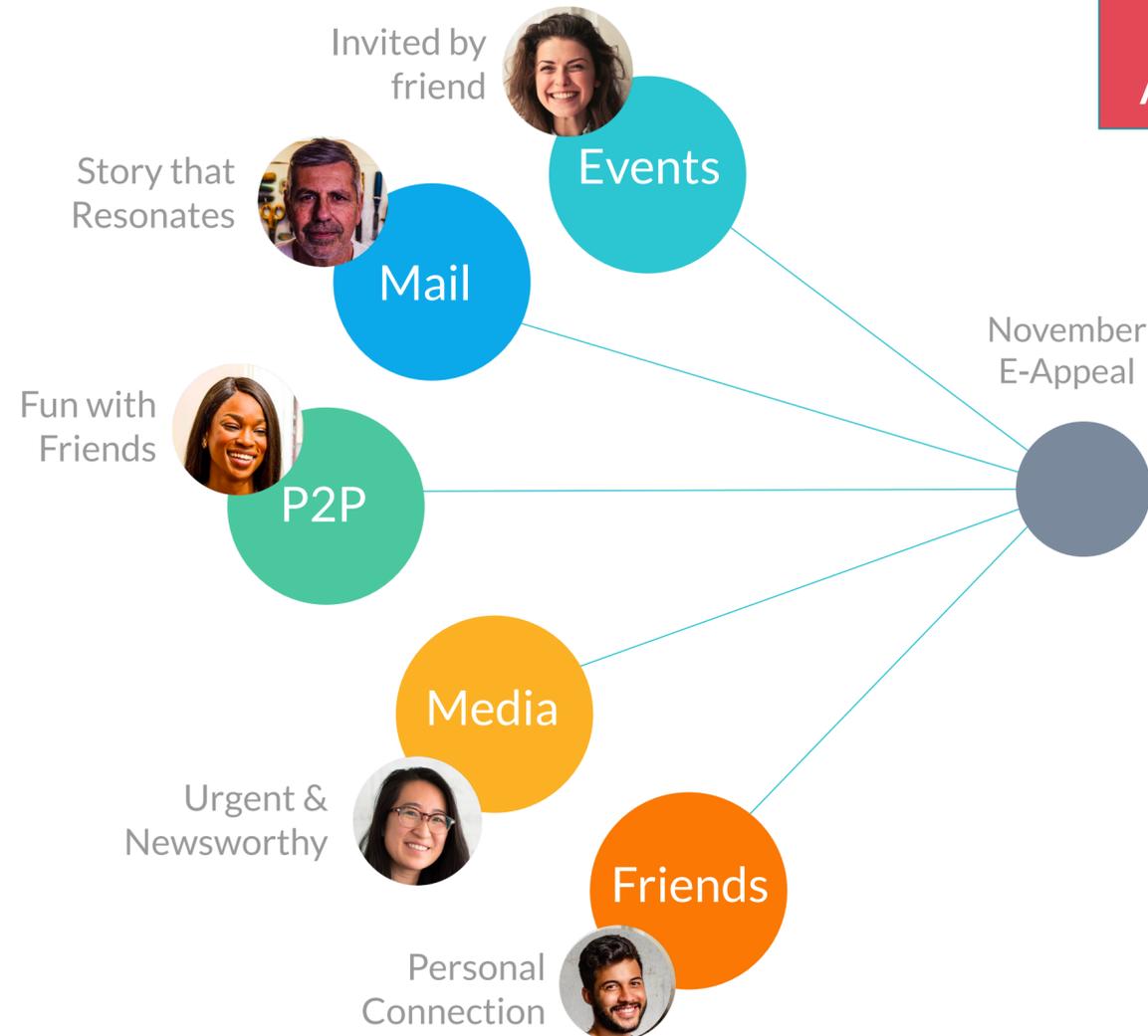
Suggest

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

Remember this Approach?

Donor/Prospect Acquisition

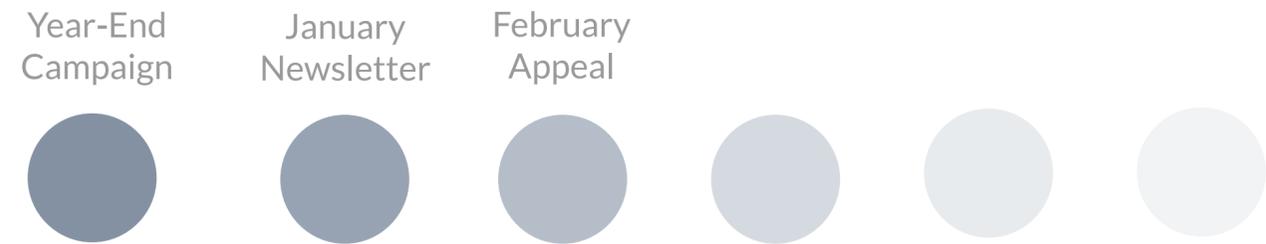
Personal. Based on Donor Timing



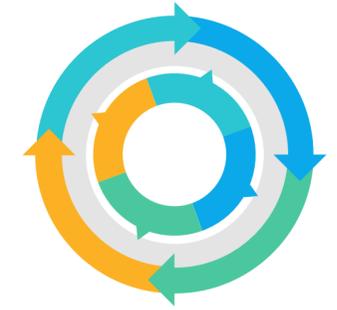
76% Attrition

Retention & Cultivation

Disconnected from Intent. Nonprofit Timing.



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!



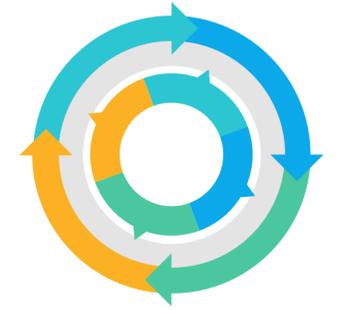
15 days



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



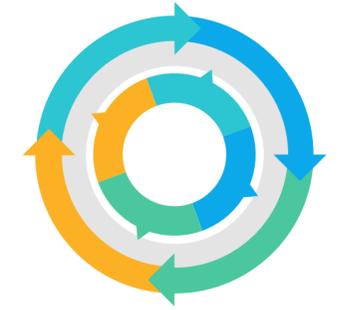
James



Malaria Info Series

Clicks to email and downloads PDF

Responsive, Dynamic Campaigns

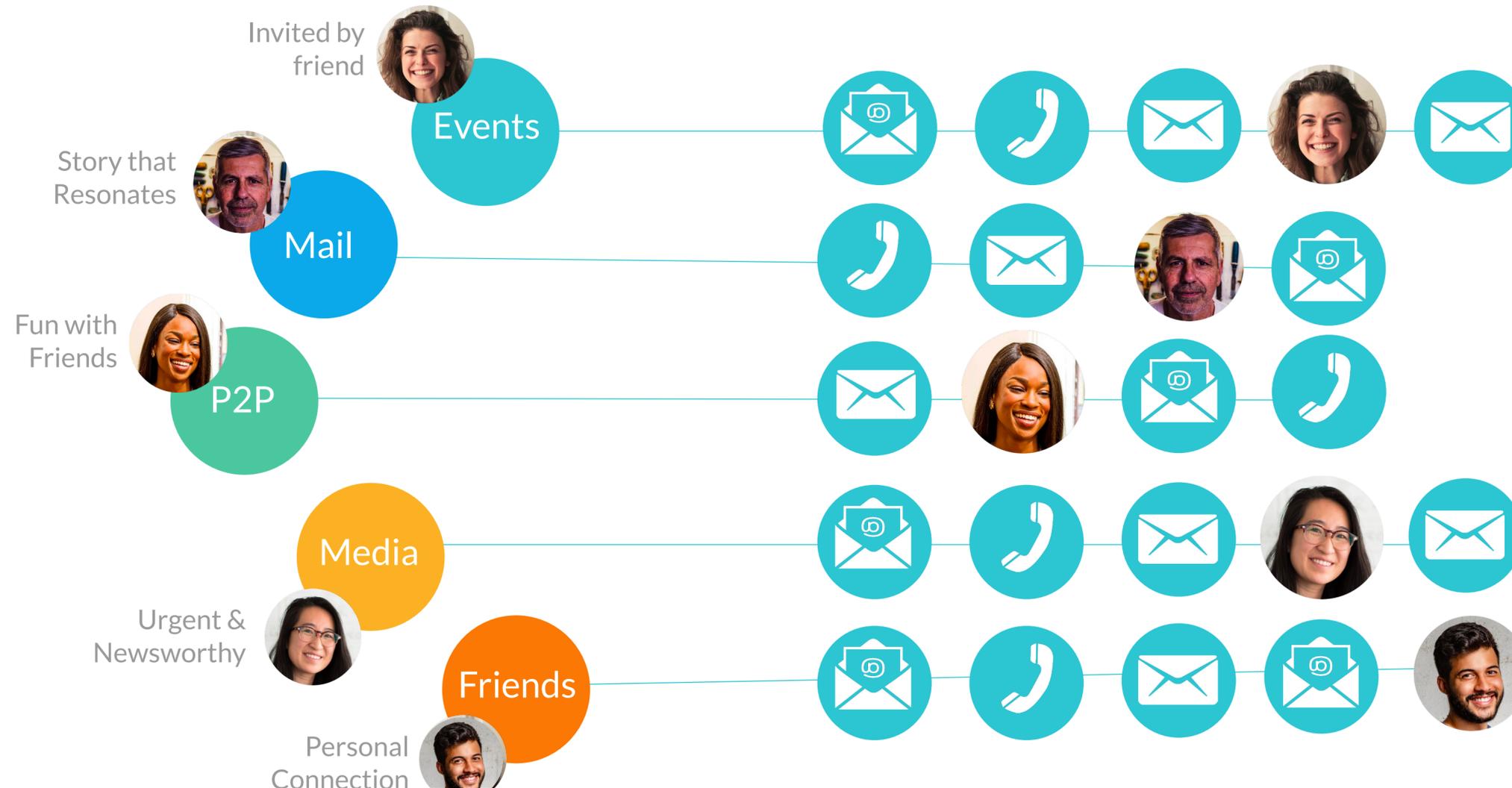


Donor/Prospect Acquisition

Personal. Based on Donor Timing

Retention & Cultivation

Connected to Intent. Driven by Donor Behavior.



The Responsive Framework



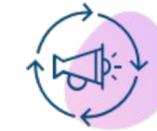
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Connect

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



Suggest

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



A DONOR-CENTRIC APPROACH

The Responsive Framework



Listen

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

1

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.



RESPONSIVE FUNDRAISING

Example: *Donor Personas & Personalized Messaging*



Erika // New Mother



Cheryl // Former Teacher



Scott // Pastor



Suzie // Mother



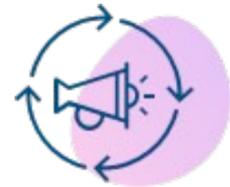
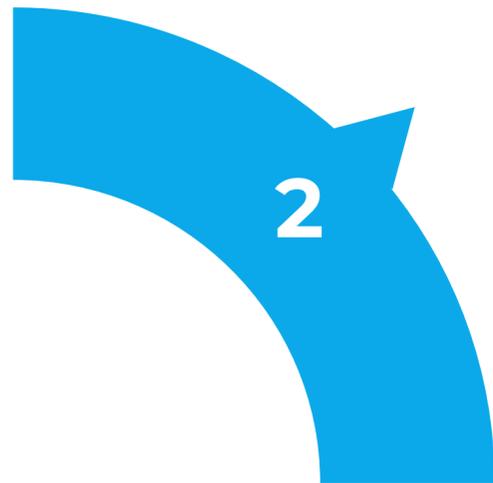
Abby // College Student



Jay // Business Owner

A DONOR-CENTRIC APPROACH

The Responsive Framework



Connect

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

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*



-  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

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 ✎ ☰

A DONOR-CENTRIC APPROACH

The Responsive Framework



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: *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

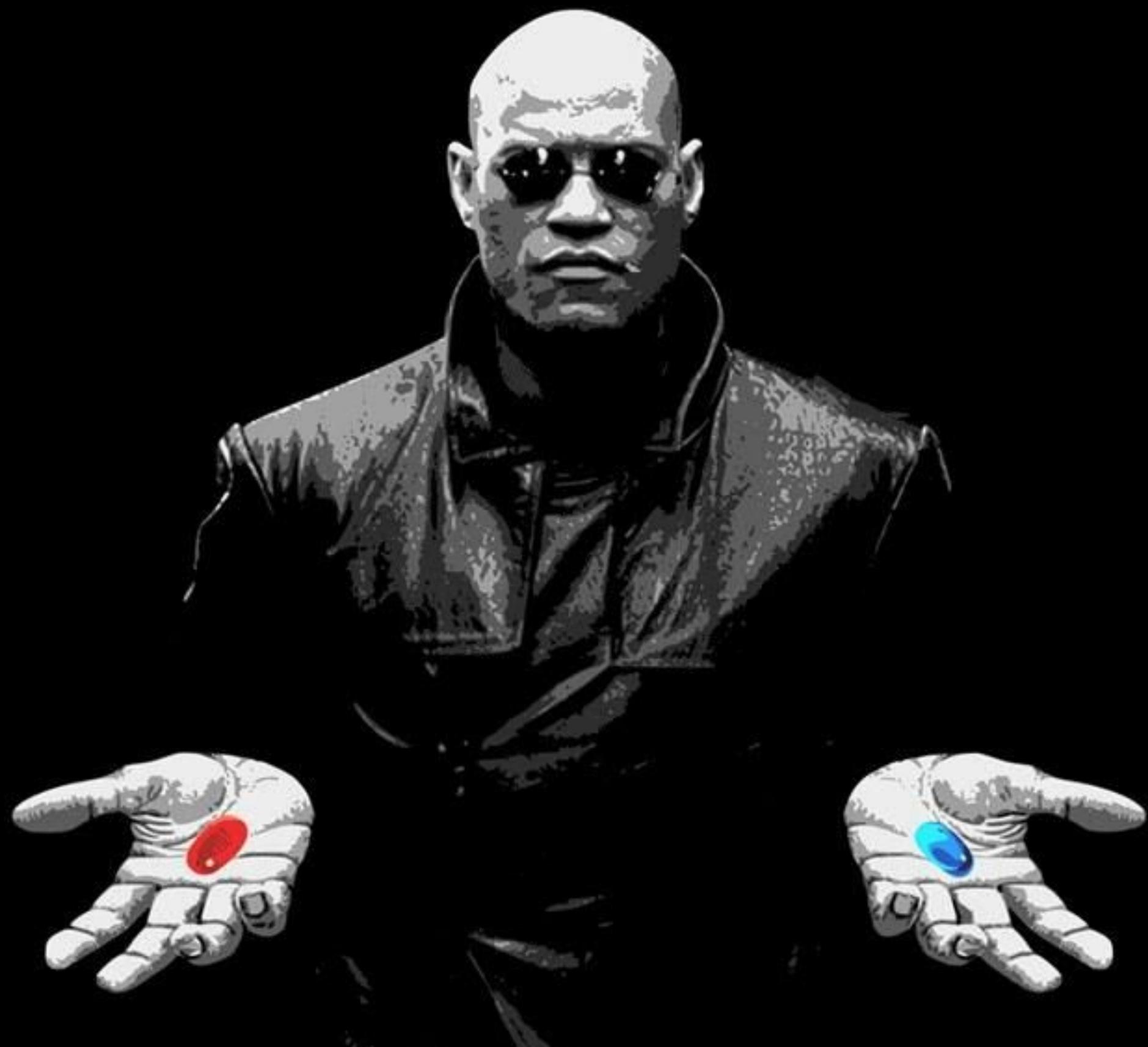
Dynamic Playbook

Personas, Campaigns, Multi-Channel,
Donor Journey

Technology Platforms

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



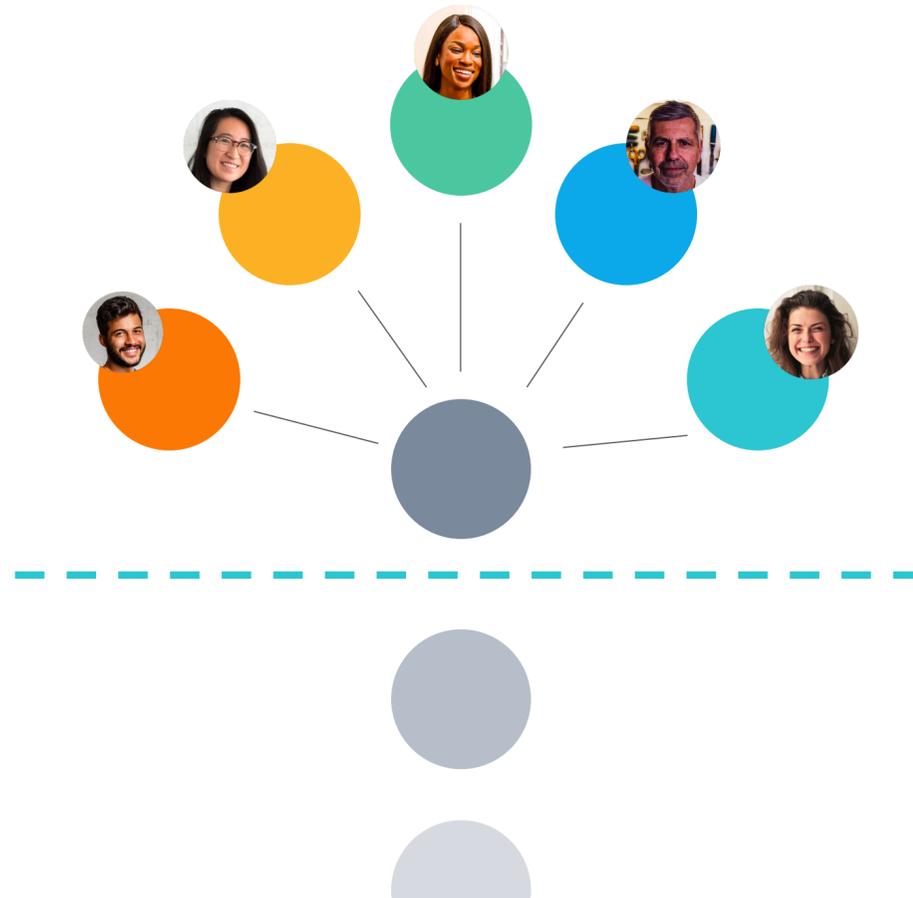


Your Nonprofit Has A Choice

Will you carry on or adapt your system to grow?

Traditional

Impersonal, Static, Siloed



OR

Responsive

Personal, Dynamic, Connected



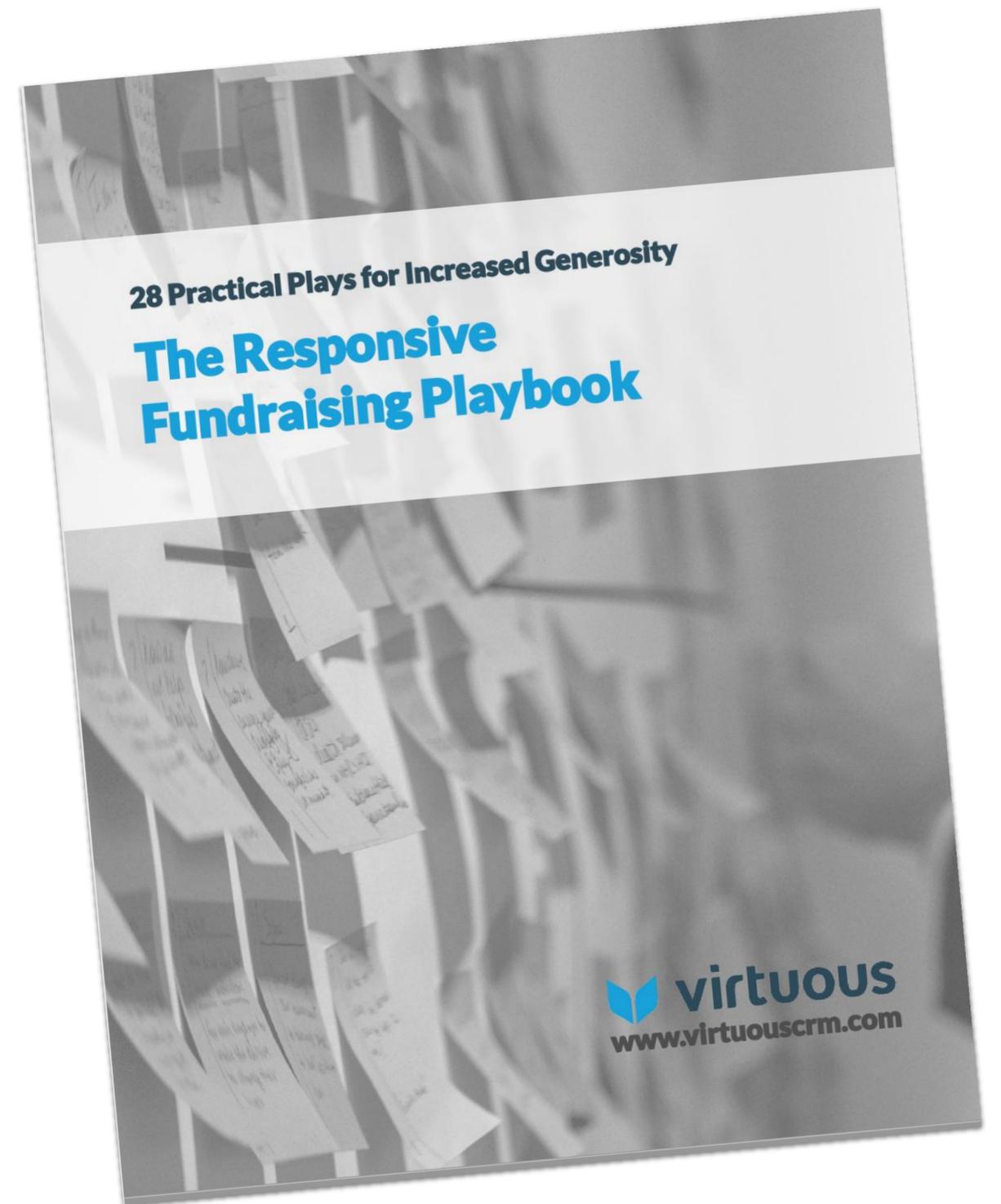


Offer: The Responsive Fundraising Pack



Send an email to responsive@virtuouscrm.com with subject line “[Data Strategy Forum](#)” and we’ll send you:

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





Questions

Let's dive in!

Share your questions in the Q&A window.