

dp donorperfect

COMMUNITY CONFERENCE
SPARK





Spark the Journey

Igniting Donor Passions for Lifelong Engagement





Laying the Foundation: An Introduction to Donor Journeys



THE PARABLE OF THE DONOR

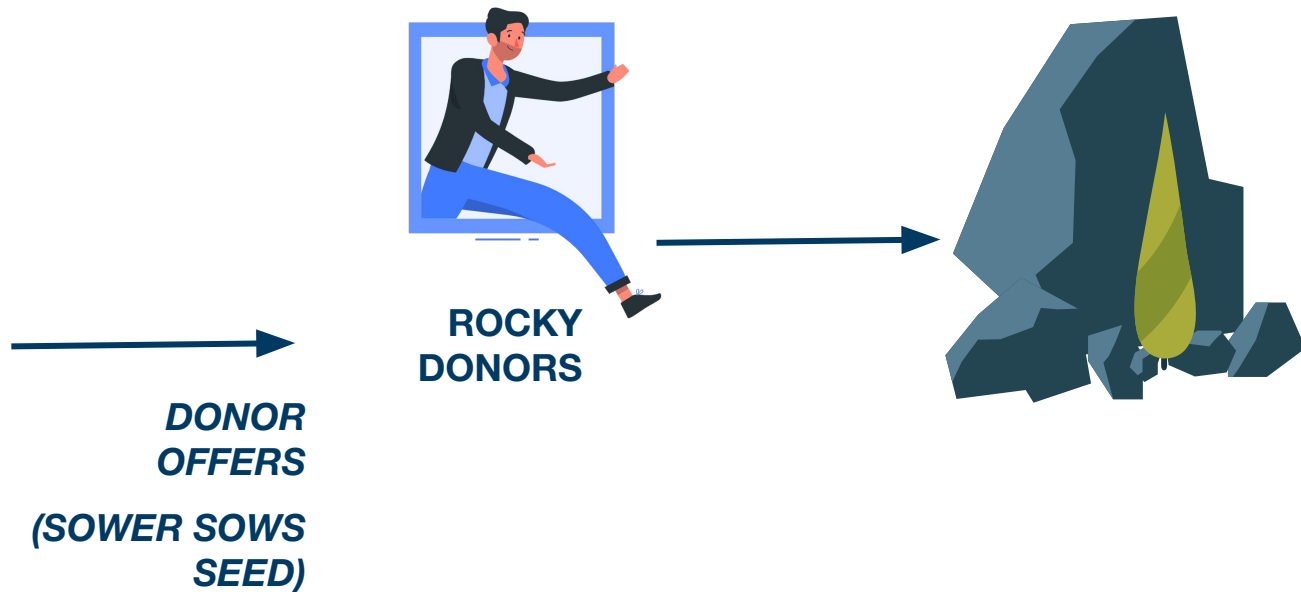


**PATHWAY
NON-DONORS**

***DONOR
OFFERS***

***(SOWER SOWS
SEED)***

THE PARABLE OF THE DONOR



THE PARABLE OF THE DONOR

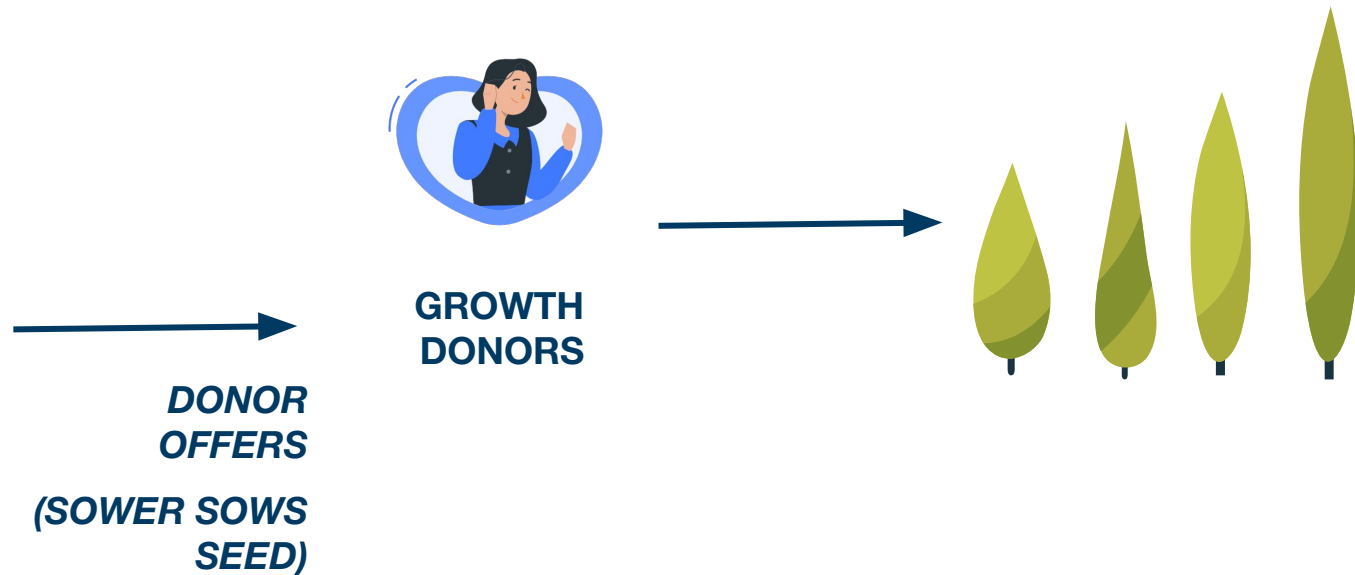


**THORNY
DONORS**

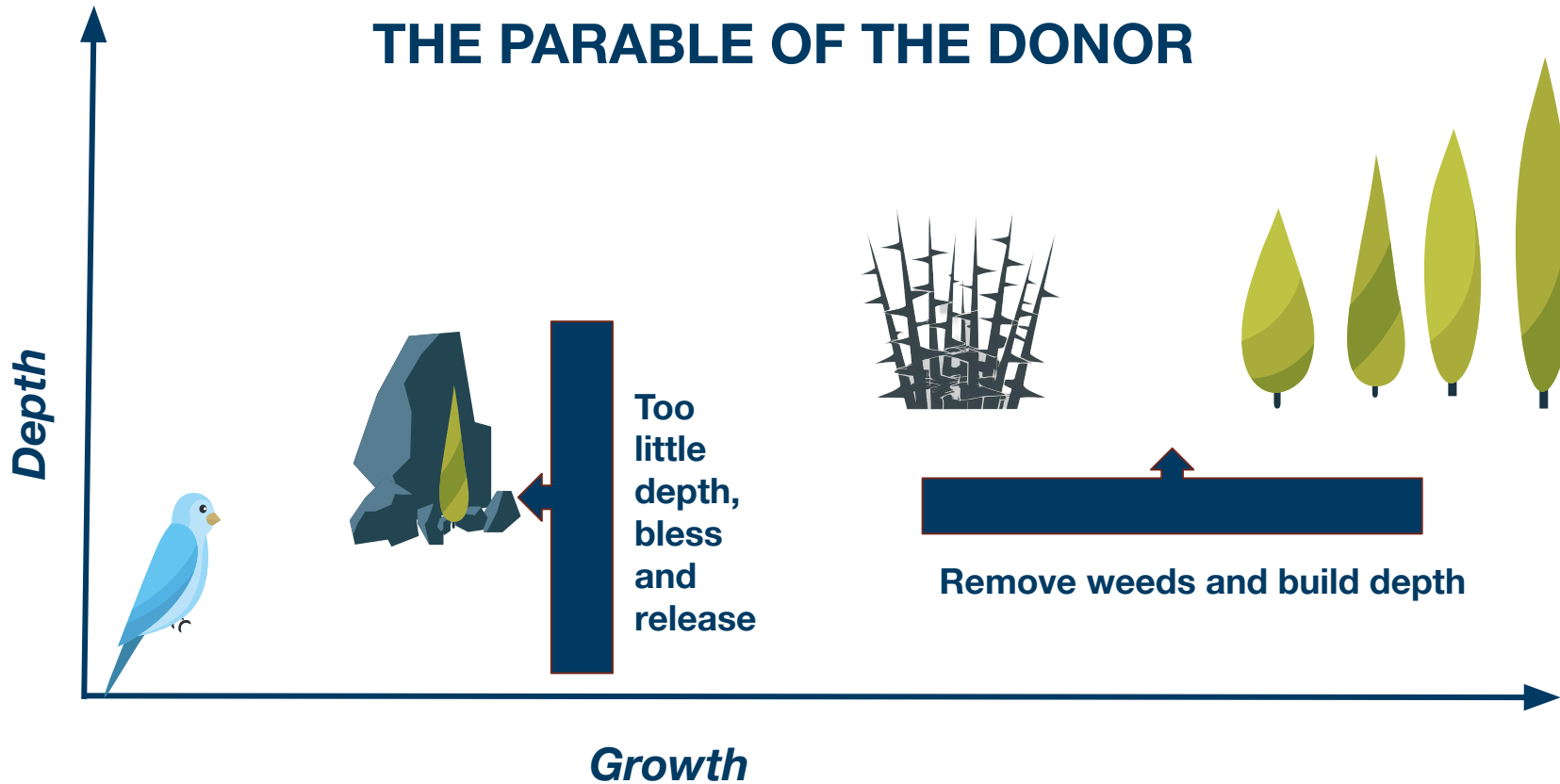


**DONOR
OFFERS
(SOWER SOWS
SEED)**

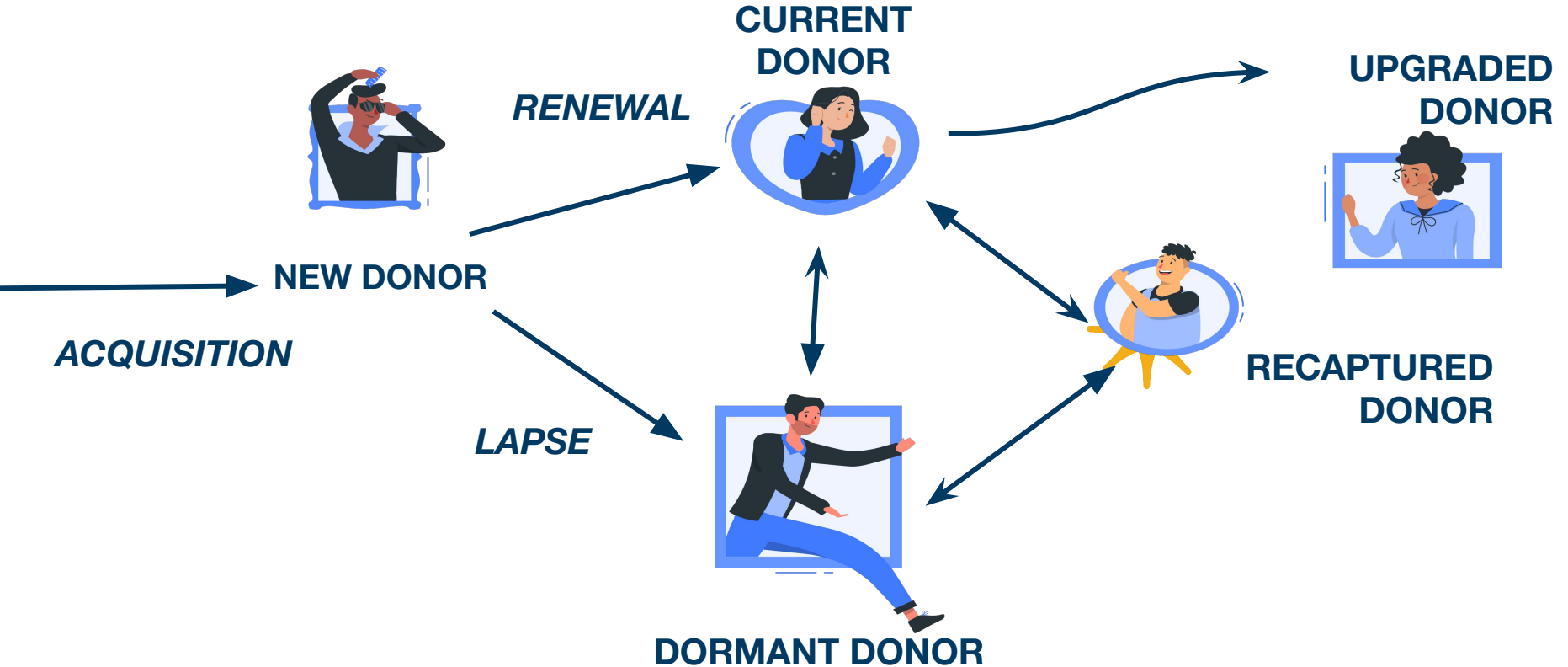
THE PARABLE OF THE DONOR



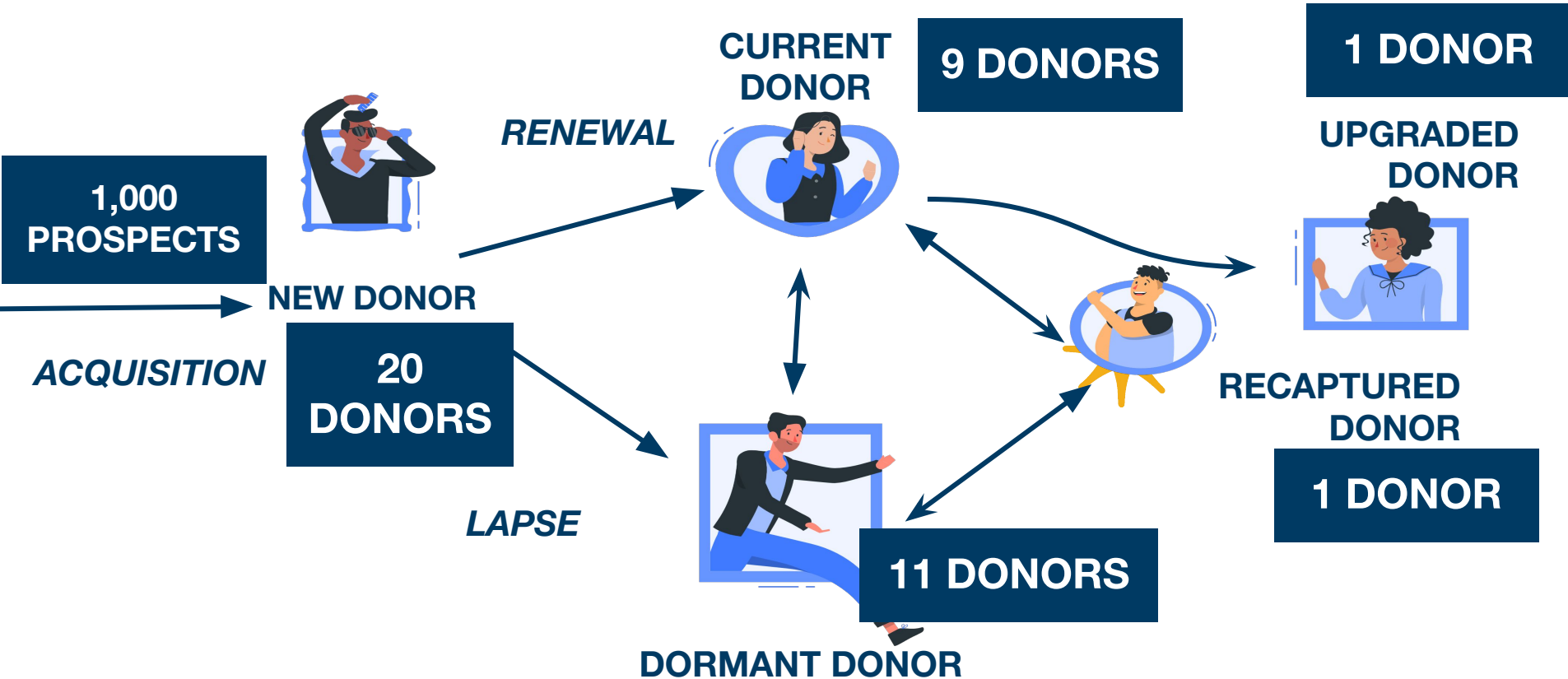
THE PARABLE OF THE DONOR



THE DONOR STEWARDSHIP LIFECYCLE



THE DONOR STEWARDSHIP LIFECYCLE





Deepening Donor Connections

Know Your Donor (KYD)

Harriet Smith | 123 Main Street, Anytown, AA | \$50 | 5/1/2024 | EOY Appeal



Donor Persona & Scenario

Persona: Harriet

Harriet is a retired school teacher and lifelong lover of the arts. Having grown up attending community theater productions, she has a deep appreciation for the cultural and educational value of local theaters. Recently, she moved to a new town and is seeking to support a local nonprofit theater to stay connected with her passion for the arts.

Scenario: Harriet is exploring ways to contribute to the local theater scene, leveraging her background in education and love for the arts to make a meaningful impact.



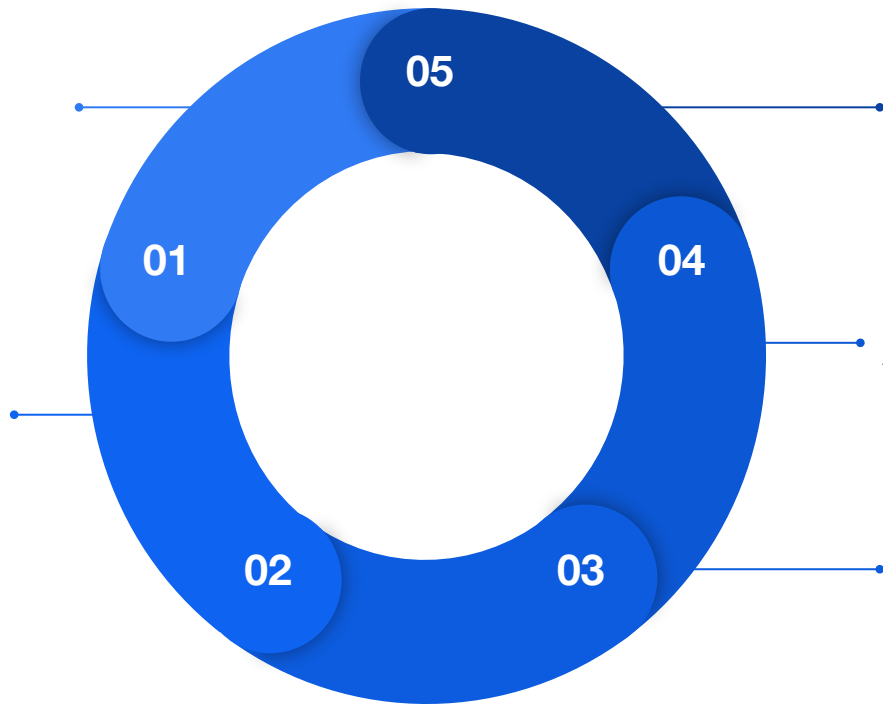
Awareness

Advocacy

Analysis

Acknowledgement

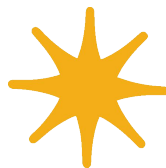
Action



Awareness

Timeframe: 6 months

- **Attends a local festival:** Harriet stumbles upon a booth for the local nonprofit theater at a community festival.
- **Sees an ad online:** She notices a well-placed ad online promoting an upcoming theater season.
- **Learns from a friend:** A neighbor mentions attending a wonderful play at the local theater.
- **Receives a community bulletin:** Her community association sends out a bulletin featuring the theater's educational programs for children.



Awareness

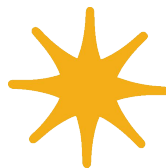
Timeframe: 6 months

Expectations: Learning about the theater's presence and its cultural significance in the community through varied channels.

Harriet's thoughts:

"It's nice to see the theater being involved in local events."

"I love that they offer programs for children. Maybe I can help with that."



Analysis

Timeframe: 3 months

- **Visits the theater's website:** Harriet explores the nonprofit theater's website to understand their mission, history, and programs.
- **Attends a performance:** She decides to attend a play to experience the theater's productions firsthand.
- **Downloads annual report:** Harriet reviews the theater's annual report to see financial transparency and impact.
- **Joins a mailing list:** Signs up for the theater's newsletter to stay informed about upcoming events and volunteer opportunities.



Analysis

Timeframe: 6 months

Expectations: Detailed, transparent information about the theater's activities, financial health, and impact.

Harriet's thoughts:

"The play was fantastic! They really have talent here."

"The annual report gives me confidence that they are using funds wisely."



Action

Timeframe: 1 month

- **Volunteers at an event:** Harriet volunteers to help with a children's theater workshop.
- **Makes an online donation:** She decides to donate online after seeing a compelling story about the theater's impact on local youth.
- **Joins the membership program:** Signs up for an annual membership to support the theater regularly.
- **Receives a thank-you email:** Gets an immediate thank-you email and membership confirmation.



Action

Expectations: A seamless volunteer and donation process, with immediate acknowledgment and gratitude.

Harriet's thoughts:

"Volunteering was a wonderful experience, and the kids were so enthusiastic."

"The donation process was easy, and I feel appreciated already."



Acknowledgment

Timeframe: 2 weeks

- **Receives a handwritten thank-you note:** Harriet gets a personalized thank-you note from the theater's director.
- **Invitation to donor recognition event:** She is invited to a special event recognizing donors.
- **Feature in monthly newsletter:** Her contribution is highlighted in the theater's monthly newsletter.
- **Exclusive backstage tour:** Offered an exclusive backstage tour and meet-and-greet with the cast.



Acknowledgment

Expectations: Personalized recognition and engagement that makes her feel valued and connected to the theater community.

Harriet's thoughts:

"It's so thoughtful of them to send a handwritten note."

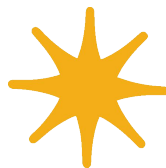
"I'm excited about the backstage tour and meeting the performers."



Advocacy

Timeframe: Ongoing

- **Shares her experience on social media:** Harriet posts about her positive experiences with the theater on social media.
- **Encourages friends to attend:** She invites friends and former colleagues to attend performances with her.
- **Organizes a fundraiser:** Leads a small fundraiser to support a new children's program at the theater.
- **Becomes a major donor:** Commits to a recurring donation and considers including the theater in her estate planning.



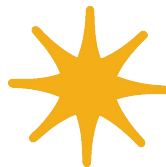
Advocacy

Expectations: Opportunities to stay actively involved and promote the theater within her network.

Harriet's thoughts:

"This organization is my responsibility."

"I can't wait to introduce more people to this amazing theater."





Deeper Engagement



**Look for points in the
journey where
expectations are not
met.**



Donor shortcuts

- A shortcut is based on belief, *not facts*
- Each donor has *their own* shortcuts





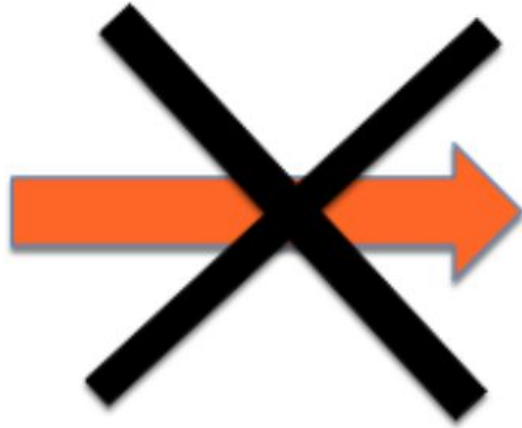
**Identify any
unnecessary or
distracting touchpoints
or interactions.**

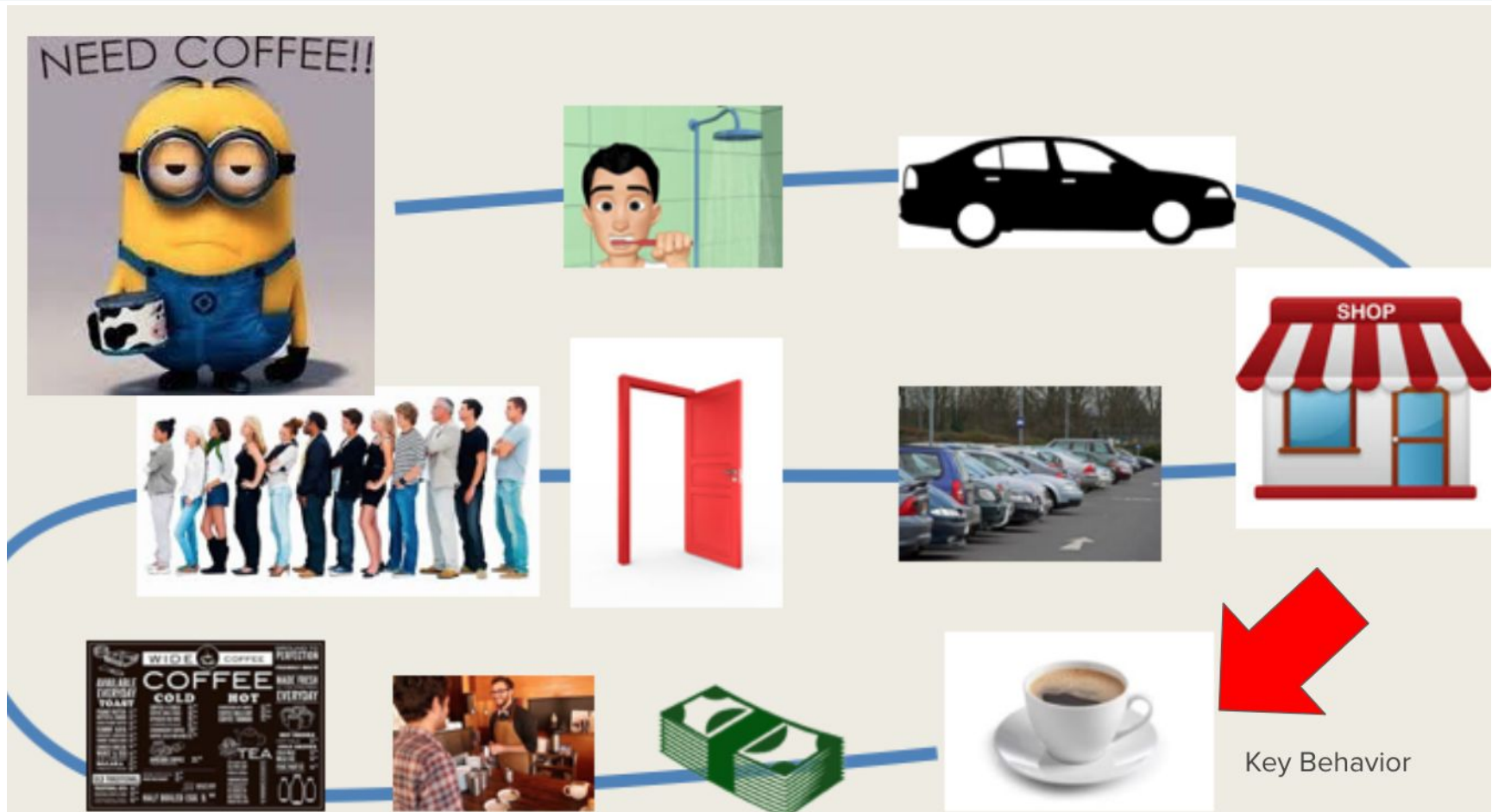




Cut cognitive cost

- Too many choices
- Friction throughout the journey
- Smooth out transitions
- Check the time





NEED COFFEE!!



Key Behavior



**Focus on moments
of truth**





Strategic Segmentation and Recognition

ACTION PLAN



12%

Distant Set Designers

Maintain - Consider digital engagement strategies to communicate statewide impact and remain top of mind



11%

Emerging Stage Crew

Cultivate - Refrain from overinvestment; Leverage for programs outreach and cultivate the next generation of donor through digital engagement



11%

Middle House Managers

Upgrade & Test - These donors give often but with limited capacity; Treat them as upgrade prospects through low cost digital testing



37%

Rising Actors

Optimize & Grow - Invest in retention and engagement strategies to model giving behaviors of Esteemed Directors; test for Major Gifts prospecting as capacity comes on line



29%

Esteemed Directors

Maintain & Maximize - Refrain from overinvestment but continue to engage and pursue for Planned Gift prospecting



Leveraging Data and Technology

Example:

Identify new donors with high potential and create personalized engagement plans.



FIRST NAME

Helen

LAST NAME

Williams

ADDRESS

|





Helen Williams

ESTIMATED CAPACITY
\$75,000+

HIDDEN GEM

SCORES



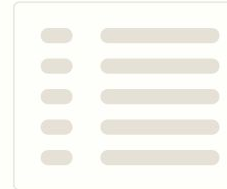
ANALYTICS




AFFINITIES



CONNECTIONS



K




4

Helen Williams

ESTIMATED CAPACITY
\$75,000+

HIDDEN GEM

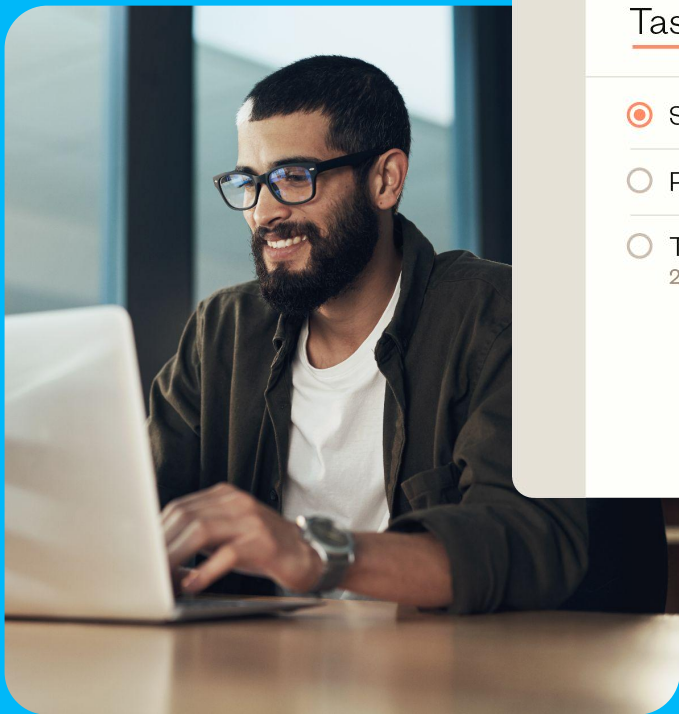


Tasks

- Send email • 3 DAYS

- Phone call • 1 WEEK

- Thank you note
2 WEEKS



Tasks

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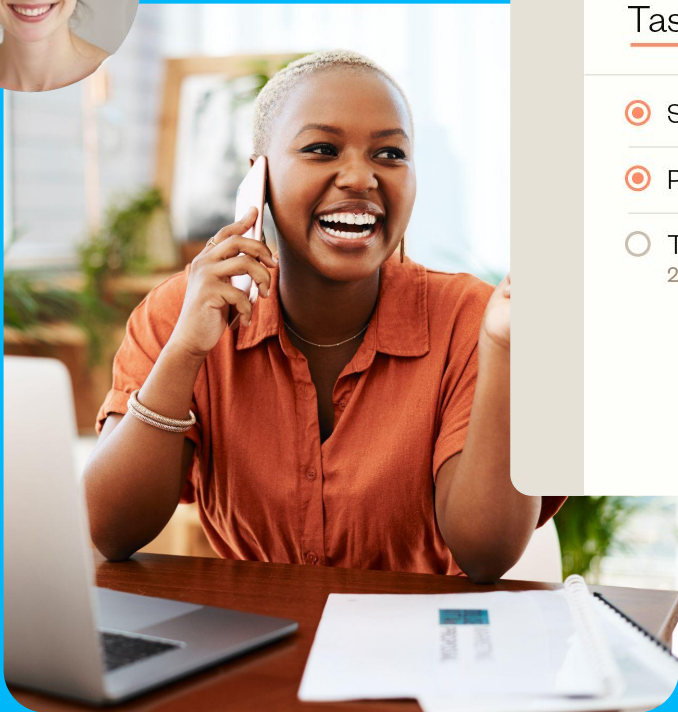
Email Script



Mrs. Williams,

I hope this letter finds you in good health and high spirits. We are immensely grateful that you entrusted us with your healthcare needs.

I would love the opportunity...



Tasks

- Send email • 3 DAYS
- Phone call • 1 WEEK
- Thank you note
2 WEEKS

Phone Script

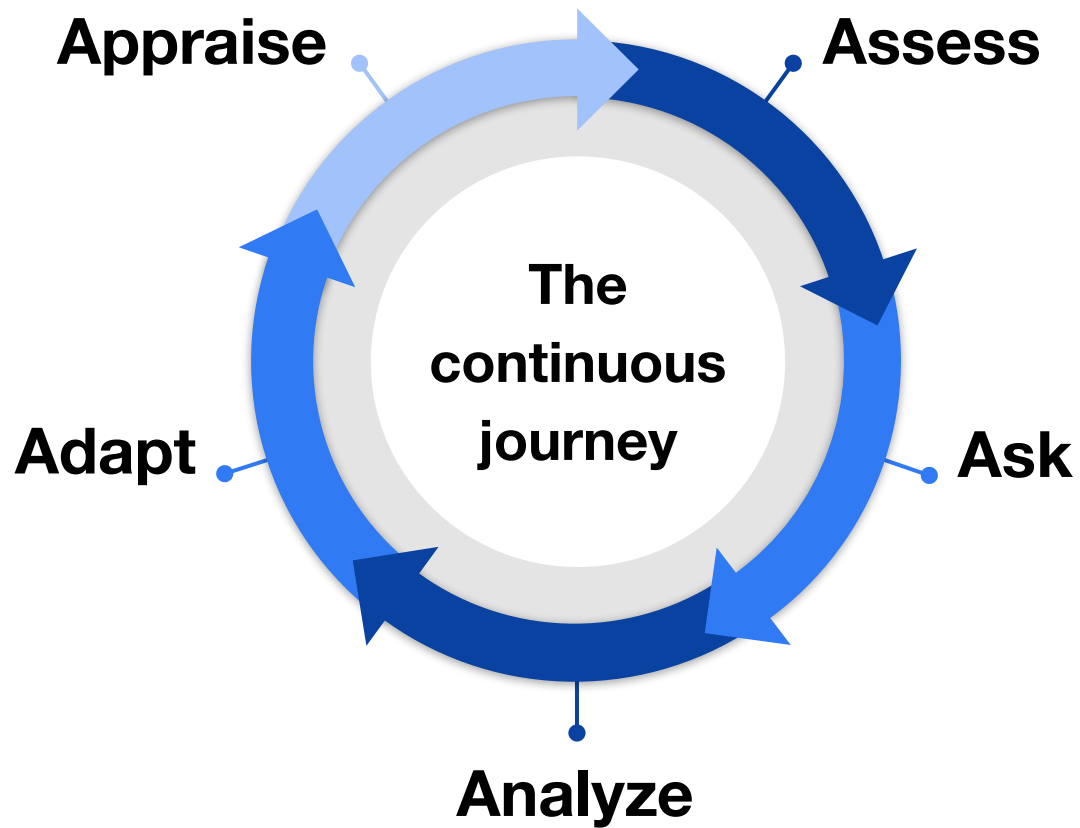


Good afternoon,
Mrs. Williams.

Thank you so much
for taking my call. As
mentioned, I would love
to share more information
with you about our capital
campaign. This year we
are planning to....



Continuous Improvement and Action



Thank you!

Cherian Koshy, CFRE CAP®
Vice President
Kindsight

 [linkedin.com/in/cheriankoshy](https://www.linkedin.com/in/cheriankoshy)

