

dp donorperfect

# COMMUNITY CONFERENCE **SPARK**





# Hello, my name is Sarah

“There is no greater power on this earth than stories”

## CONNECT WITH ME:



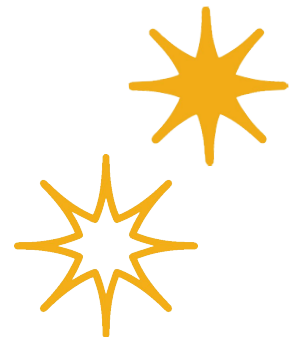
Slalonde@donorperfect.com



<https://www.donorperfect.com/learning-center>



[linkedin.com/Sarah-Lalonde](https://www.linkedin.com/Sarah-Lalonde)



# Share Your Story & Segment Your Donors to Spark Lasting Engagement





**With storytelling, you're not just asking for money, you're sharing a narrative that tugs at heartstrings, and in turn, opens up wallets.”**

**- Mallory Erickson**

# What do we need?



## What?

The Story:  
What will you send  
send



## Who?

Segment to send  
the story to



## How?

Communication  
method

# Do you need help writing this story?

## Try the DonorPerfect Fundraiser Bot!



\*ChatGPT is a product of OpenAI and subject to its terms and conditions.

### Welcome to the DonorPerfect Fundraiser Bot

Hi there! I'm here to help you create fundraising communications like emails, letters, social media posts and more.

I'm powered by ChatGPT\* and free for nonprofits to use to help you raise money!

Please use this step-by-step tool to create fundraising appeals and other communication. All fields are required.





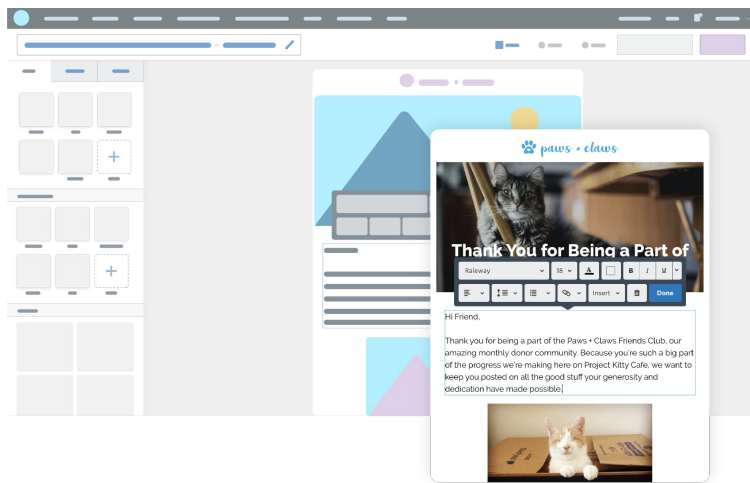
## How to Segment in DonorPerfect?



## Selection Filters!



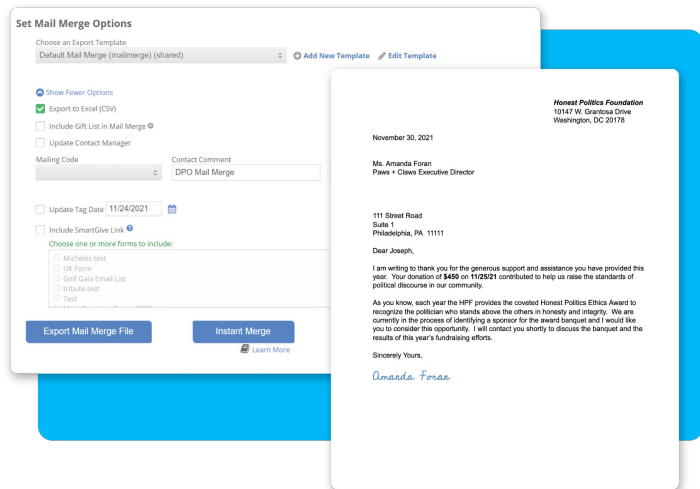
# Email Communication using Constant Contact



- ★ Integration with DonorPerfect
- ★ DonorPerfect templates directly in Constant Contact
- ★ Use selection filters to create manual and dynamic lists
- ★ Track emails sent directly in DonorPerfect!

# What about Mail?

- ★ Use DonorPerfect Fundraiser Bot, same information just change the delivery method
- ★ Use Mail Merge to export a list, or merge into a letter directly
- ★ Include a QR code on your letter!





## When you receive the gift

Thank your donors using Email Templates in DonorPerfect

Use Constant Contact to send follow up emails and update your donors on their impact

Use the Fundraiser Bot to help you create regular content



## Recap

- ★ Your story is important
- ★ Use tools directly in DonorPerfect to communicate such as:
  - Mail Merge
  - Constant Contact Integration
  - QR codes
  - Fundraiser Bot



# Q&A

# This is a General Slide Title

This is a sentence on the slide. This slide is probably good for something with a lot of text and no images. [This is a link »](#)

- I am a bullet
- I am another bullet
  - I am a sub-bullet





## I'm a Section Header

I'm a section sub-header, you can delete me if you want!



## I'm a Section Header

I'm a section sub-header, you can delete me if you want!



# This is a General Slide Title

This is a sentence on the slide. This slide is probably good for something with a lot of text and no images. [This is a link »](#)

- I am a bullet
- I am another bullet
  - I am a sub-bullet







# Share Your Story & Segment Your Donors to Spark Lasting Engagement



# This is a 2 Column Slide Title

This is a sentence in the left column.

- I am a bullet
- I am another bullet
  - I am a sub-bullet

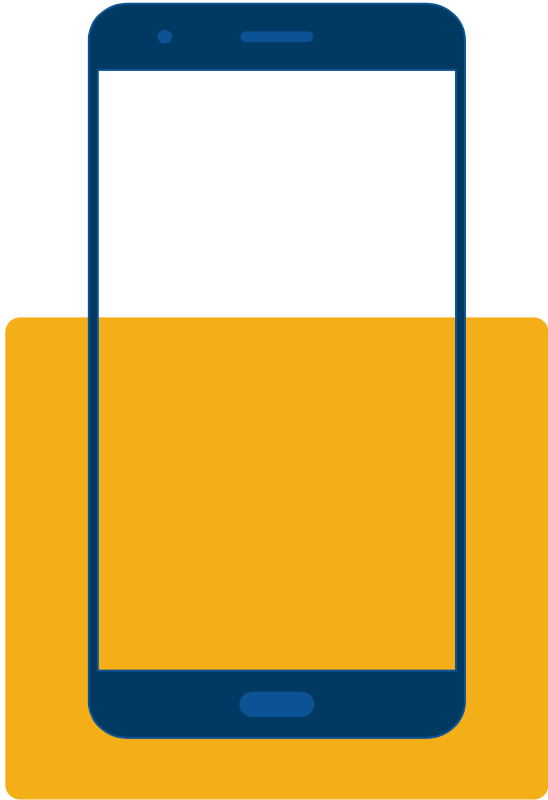
This is a sentence in the right column.

- I am a bullet
- I am another bullet
  - I am a sub-bullet











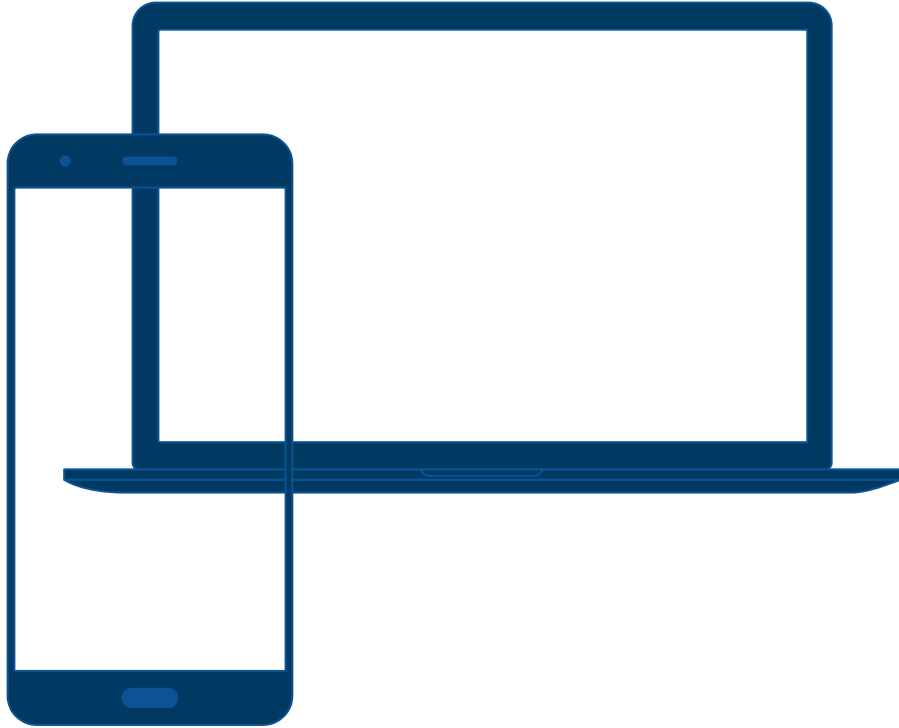






“

**Put a quote here!”**



**Total Records**  
1,018

100% of your database will be synchronized

**Moves**  
25

10 new household addresses  
15 new individual addresses

**Non-Mailable Addresses**  
14

1 invalid addresses  
3 vacant addresses

**Deceased Records**  
10

4 deceased households  
6 deceased individuals

**Nicole Summers**

30 Race Street, Philadelphia PA

msummers@gmail.com

111-555-777

**Annual goal**  
January 1, 2021 to December 31, 2022

**\$9,875**

10%

\$ 50,000

20 gifts from 10 donors  
0 new donors to the organization

**Past Due**

Mar 10	Joyce Bartholomew	Telephone Call page 2000	Mark as done
Mar 21	Roger Sandstone	Home Visits page 2000	Mark as done
Mar 25	Albert Warden	Telephone Call page 2000	Mark as done
Jan 30	Fred Henderson	Telephone Call page 2000	Mark as done
Jan 30	Alison Hull	Telephone Call page 2000	Mark as done
Jan 30	Berley Vetter	Telephone Call page 2000	Mark as done

Show All Tasks until Jan 2021

**Review Batch Reports (recommended)**

Select Report

- ☒ Transaction Listing
- [Show More Options](#)
- ☐ GL Summary Listing
- ☐ GL Detail Listing

Report Heading (Optional)

☐ Display Individual and Consolidated Gifts

☐ Include Tribute Notifications

Screen Printable Excel Word

Automatic Processing

Run a one-time batch

Reminders

**Automatic processing is On**

- Payments process on their scheduled due date
- Daily confirmation emails are sent to 1 recipient

**Automatic receipts is On**

- Email receipts are sent after each successful batch.
- Visit [Email Receipt History](#) to track your Automatic receipts.

Edit settings

**Save a Life**

Supporting Coral Access Rescue  
Created by Alan

\$550 of \$2,000 Goal

**Annual Fundraising Goal**

by 7/31/2021

Received \$187,101

Goal \$180,000

**DONOR RETENTION**

Past Year Retained from the Prior Year

74%

**Receipt Filter Options**

Type of Receipts to Send

☒ Email ☒ Letter ☐ Annual Consolidated Email

[Show More Options](#)

**Your Receipt**


Your payment was approved.

Please print this page for your records.

Transaction Date

Transaction Amount

**Thank You!**



**donorperfect : ALERT**

**Gift over \$500!**

Give Dr.Chadha a personal phone call to thank them for their gift of \$550.00

Phone number is (555) 533-5555

**CLOSE**



**PERSONA NAME:**  
**NETWORKER NICOLE**

**DONOR PERSONA**

Age: 57

Housing: Suburban upper middle class home

Family: Married with young adult / college-aged children

Education: Bachelor's Degree

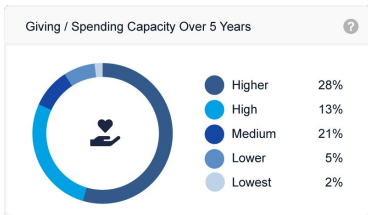
Household Wealth Rating: 85

Employment: Self-employed PR consultant

Social Media Usage: Frequent social media user

Giving Activity: Supports several charities in her local community

About:  
Regularly attends social gatherings, events, and speakers. Enjoys personal travel and restaurant dining. Has more time to contribute now that kids are grown.



**Send Email**

**Send Email**


**Via DonorPerfect**

**Via My Email**

**Mr. Edward Vo**

9177238-8046

Volunteer | Likes by 121 | Author of 1 | Volunteers writing skills | Passionate about advocacy training



**Mr. and Mrs. Roger Sandstone**

4/16/2020 - Member at Health Charities Club and...

**Major Donor**

**Monthly Donor**

**Volunteer**

**\$35**

**\$5,000**

**\$14,659**

**28**

**9 years**

**Main** | Gifts | Pledges | Contacts | Bio | Other | Links | Addresses | Accounts

**Constituent Contact Information**

Title (Dr/Ms)  First Name  Last Name  Organization

Optimal Line  Address  City  State  ZIP

Constituent Type  Anonymous Donor?  Deceased?  Status  Mobile Phone  Business Phone  Email

Engagement Status  Engagement Level Current Year  Receiving Preference

**Spouse/Partner Information**

Spouse/Partner Full Name  Spouse Gender


Spouse Deceased?  Spouse Deceased Date

**Contact Preferences**

Do Not Send Mail?  No Mail Reason  No Mail Requested

Do Not Email?  No Email Reason  No Email Requested

Do Not Call?  No Call Reason  No Call Requested



**SUBMIT YOUR CLIP**

**Event Details** | Create Invites | Manage Responses | Manage Registrants | Tables/Teams

**SPRING GALA**

Event Date

Solicitation Code

Event Name

Description

Location

Location Address

Primary Contact

Primary Email

Goal

FVM Total

Expenses

Net Income

Event Total

Invited

Attending

**54%**

### Set Mail Merge Options

Choose an Export Template  
Default Mail Merge (mailmerge) (shaded)

☐ Add New Template ☒ Edit Template

☒ Show Header Options  
☒ Export to CSV  
☐ Include QR Code in Mail Merge  
☐ Update Contact Manager

Mailing Code:  Contact Comment:

☐ Update Log Date: 11/04/2021  
☐ Include Shortcode Link  
 Choose one or more forms to include:  
☐ Include QR Code  
☐ Include QR Code  
☐ Include QR Code  
☐ Include QR Code

[Export Mail Merge File](#) [Instant Merge](#)

November 30, 2021

Ms. Amanda From  
Paw + Claw Executive Director

111 Street Road  
Suite 100  
Philadelphia, PA 19101

Dear Jennifer,

I am writing to thank you for the generous support and assistance you have provided this year. Your donation of \$400 on 11/03/2021 contributed to help us meet the standards of political discourse in our community.

As you know, each year the DPF provides the annual award for the most generous donor to support the mission of the DPF. We are proud to announce that you have been selected as the most generous donor to support the mission of the DPF. We are proud to announce that you have been selected as the most generous donor to support the mission of the DPF.

Sincerely Yours,  
Amanda From

### Online Forms (new)

- One Time Donation
- Monthly Giving

### Classic Forms

- Volunteer Sign-up
- Event Registration
- Membership
- Surveys
- Mailing Subscription

### Classic Forms plus

- Crowdfunding

### Join our growing network!

**CONTACT**

First Name \*  
Jennifer

Last Name \*  
Graham

Address \*  
2222 Pine St

**Jennifer Graham**  
124-143-5235 **CELL** ID 140  
kramage@softerware.com

### Drag & drop to build your form

**Form title**  
Use this for form titles and headlines

**Section header**  
Use these to organize forms into sections

**Descriptive text**  
Create instructions or

I want

### Join our monthly giving program!

**One time** **Monthly**

\$10 ☐ \$20 ☐ \$30 ☒ \$50 ☐

**Contact**  
First Name \*  
Last Name \*

**Marisol Dominguez**  
4111 xxxxxx 1111  
Exp: 01/35

\$50.00 **One-Time** **Monthly**

Marisol Dominguez

**Next Charge \$50.00**

Additional Fields

### Select your payment method

[Pay with PayPal](#)

☐ Pay with card

Credit Card Number \*  Expiration \*  CVV \*

We use the highest level of PCI certification and 256-bit encryption to keep your payment information safe.

Text...  
VOLUNTEER - to donate time  
VIDEO - to see an inspirational story  
PLEDGE - to make a pledge  
DONATE - to donate by credit card

Volunteer

Thank you for your interest in volunteering with Coral Acres, please tell us your first and last name.

### Report Center

**Add New Easy Report**

Report Name	ID	Last Run	Actions
Top Donor Listing	68	10/06/2020	Actions
GR Comparison by Time Period	47	02/01/2020	Actions
Gifts by Date	14	03/01/2020	Actions
Solicitation Analysis	56	03/01/2020	Actions
General Ledger Analysis	23	11/06/2020	Actions
Cross Tabulation Report	6	10/06/2020	Actions
Gift Listing with Sort Credits	16		Actions
Month and Year to Date Summary (Calendar)	37		Actions
Constituent Summary	79	10/06/2020	Actions
Export to File	13	10/06/2020	Actions



















