



your fundraising success partner

## Please note

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This guide is intended to be applied to our current DonorPerfect product and its features. As we come closer to achieving our future goal of becoming an intelligent fundraising platform we will continue to evolve the DonorPerfect brand to reflect how we partner with the nonprofit community.



We are forming two collaborative working groups that span UX and Marketing to own and maintain the standards set in this document. These groups will work together to ensure quality and consistency as branding is applied to product and marketing assets.

### CONTENT

- Mission statement
- Values
- Brand personality
- Voice + tone
- Core messages
- Naming conventions

### DESIGN

- Color palette
- Typography
- Iconography
- Photography
- Modal styles

our success is the success of our customers

### **as fundraisers**

We partner with our customers to help them achieve their professional goals.

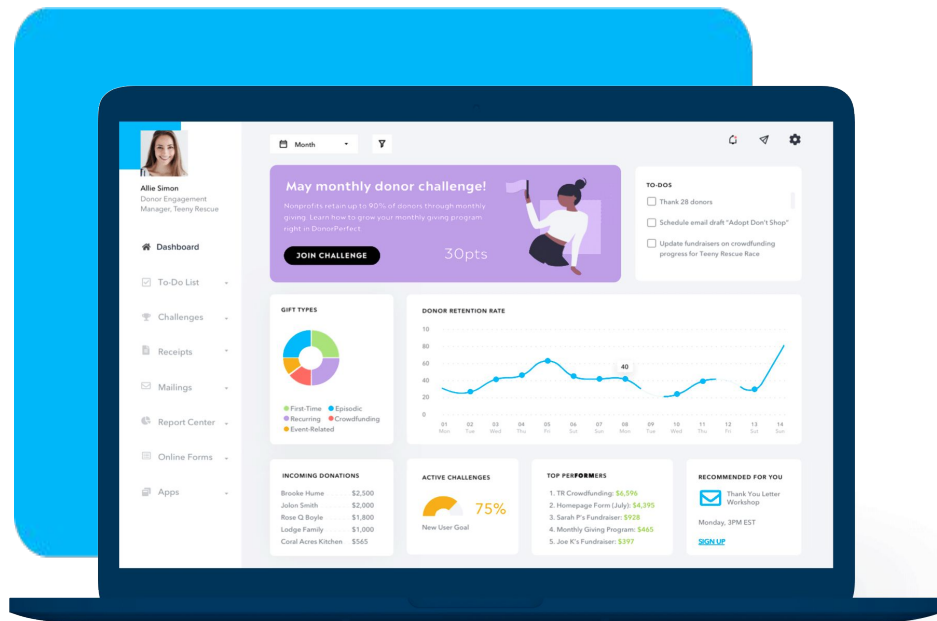
- Center the DonorPerfect experience around Growth in Giving
- Share customer success stories to encourage and inspire growth
- Promote a people-centric development process by treating our users like the stakeholders they are

### **as changemakers**

We celebrate and emulate the work and aspirations of the people we serve.

- Spotlight the impact our customers create in their communities
- Support and strive to follow their efforts toward a progressive, equitable work culture and society as a whole
- Join in their game-changing missions via SofterWare Gives Back

# Our vision: Where do we want to go?



the fundraising platform that  
learns as you grow

DonorPerfect is an intelligent fundraising platform that actively guides your nonprofit's growth through data-based recommendations and fundraising best practices.

### **Meet your fundraising success partner.**

Through in-product guidance and fundraising expertise to top-notch training and support, we partner with your team to help you succeed in saving time, raising money, and growing your donor community.

### **Design your standout donor journey.**

The first gift is just the beginning. Grow meaningful relationships with digital engagement tools that personalize the donor experience.





### **Streamline gift collection from start to finish.**

Save time with donation forms that handle data entry for you and automated gift receipts that say thanks the moment a donor gives.

### **Work better together from wherever.**

Whether you're socially distanced or fully distributed, DonorPerfect effortlessly aligns your team around key metrics, daily to-dos, and high-level goals.

### **partnering with the nonprofit community for over 30 years**

DonorPerfect ensures that every step in your journey is fully supported by people and products trusted to guide nonprofits' success for over 30 years. In that time, the DonorPerfect Community has grown to include tens of thousands of professional fundraisers who have raised over a hundred billion dollars. Through partnering with our customers, we continue to evolve and innovate DonorPerfect into a top-rated fundraising platform recommended by organizations of all sizes and sectors.



## Personas: Who are we talking to?

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### **Founder Fran**

DonorPerfect helps me and my small team do everything, from donor data management to fundraising and engagement.



### **Right Hand Rachel**

DonorPerfect helps me launch and manage fundraising campaigns and track their effectiveness.

## Personas: Who are we talking to?

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### **Daily User Damian**

DonorPerfect helps me manage our donor database from my home office.



### **Part Time Patti**

DonorPerfect helps me support the administrative needs of a local nonprofit as a volunteer.



### **Executive Ethan**

I rely on DonorPerfect's reports run by my team to advise our organizational strategy.

## Brand personality



### Friendly

Talk to customers the way you'd speak to a friend when you help, advise, and engage them.



### Authentic

Communicate with sincerity and warmth to build relationships and maintain trust.



### Encouraging

Empower customers with simple, straightforward guidance that promotes confidence.



### Helpful

Break down technical concepts into layperson terms where and when customers need us.

### Addresses

Use abbreviations in addresses in Initial case with a period.

EXAMPLE: Apartment: Apt.

### Acronyms

Avoid acronyms if possible. Spell the full word and follow with the acronym in parentheses on the first reference. For example, the Association of Fundraising Professionals (AFP).

### Bold

Use bold to highlight UI elements in instructional text.

EXAMPLE: Click Add New > Individual to add a record for an individual person.

### Capitalization

Use sentence case, even in headings and titles since this is more casual and friendly.

EXAMPLE:

Create a form

Save and close (button text)

Preview page (button text)

Style your form

### Currency

No space between the currency symbol and the dollar amount. Put a minus symbol in front of the currency symbol for negative amounts.

EXAMPLE: \$75.00

### Dates and Time

Use:

MM/DD/YYYY (without a leading zero)

Month DD, YYYY

Month YYYY

Day, Month, DD (no leading zero)

Capitalize AM and PM with no periods.

Express time as H:MM AM/PM timezone.

EXAMPLE: The 2020.01 release of Wolf will be available on Sunday, January 25 at 10 PM EST.

### Emoji (In product)

Do not use emojis since they can appear differently across iOS and Android platforms. Also some emojis can have different meanings in different cultures. You may unknowingly offend clients without meaning to.

### Italics

Avoid italics. Use bold instead when possible.



## Content formatting

### Links/URLs

- URLs should appear as blue text that is NOT underlined. The underline should appear when the user hovers over them.
- Use descriptive text for the link, not specific actions such as “Click here”.
- To spell out a URL, use lowercase, even if it refers to a product name.
- Use only the website url. Don’t specify the protocol (https) or add “www” to the domain.

EXAMPLE: Share your form with supporters. Visit [donorperfect.com](https://donorperfect.com) to learn more.

### Mobile

Write for the smallest screen first since we are a mobile optimized product.

### Numbers and Percentages

For most content:

- Spell out numbers *one* through *nine*, and use numerals for numbers 10 and greater.
- Spell out *first* to *ninth*, and capture *10th* or greater with numerals.
- Use numerals followed by words for amounts of money in cents or greater than \$1 million
- For percentages, use the percent sign (%)

EXAMPLE:

First place, \$3.4 million, 5 cents, 43% of donors

### Numbers in Headings and Titles

To promote ease of reading and scannability, use numerals instead of spelling out numbers in titles and headings.

EXAMPLE: 25 Ways to Share Your Form

### Phone Numbers

- Use dashes in phone numbers.
- Include the area code.
- Leave off the country code.
- Don't bold anything.
- Omit 1 before area code, except for toll free numbers.
- Use "ext." for extension if needed.

EXAMPLES:

123-456-7890

123-456-7890 ext. 234

1-888-555-1212 (toll free)

### Salutations

Don't write a dash/hyphen after a person's name.

EXAMPLE: Hello Tom

### Sentence Case

Sentence case is casual and friendly and aligns with our helpful, encouraging and authentic tone. Do not use sentence case for official names and proper nouns. Otherwise, use it in all other cases.

EXAMPLE: Go back to form list

### Sensitive Data

When displaying sensitive credit card, bank account and other numbers, include the first number and last four numbers of the account. Use a lower case x to replace other account numbers.

EXAMPLE:

5xxxxxxxxxxx7370

### Signing Off

The proper way to sign off any system generated emails is “The [PRODUCT NAME] Team.”

EXAMPLE: Thanks! The DonorPerfect Team

### Symbols

- Use the “%” sign with a number.
- Do not use the “&” sign. Use the word ‘and’ when needed.
- Use the “#” sign when referring to hashtags but not numbers. (See the **Numbers and Percentages** section on how to refer to numbers.)
- Use the “@” for email addresses and social media mentions

### EXAMPLES:

90% of recurring donors are retained.

#givingtuesday

Email [info@donorperfect.com](mailto:info@donorperfect.com) for more information.

Follow us [@donorperfect](#) on Twitter.

### Usability

- Include alternative text tags (<alt> tags) for all illustrations.
- Limit the alt text to 50 characters.
- If possible, introduce illustrations with a descriptive sentence that lets users know an illustration exists.





### **DonorPerfect Names and Terms**

Refer to the DP Online Forms glossary, Credit Card Terms and DonorPerfect Fields list for the full word list and appropriate spelling and usage.



### **Content Checklist**

Check spelling and capitalization of product names: DonorPerfect, DPMobile and DP Online Forms.



### **Don't use platform-specific words like touch, tap, click, and so on.**

When creating In-App content, write for mobile screens and keep copy as short as possible.



### **Keep sentences short and avoid compound sentences.**

Avoid nonprofit or technical jargon. Not everyone knows what Lybunt and Sybunt means.



### **Keep the benefit of the feature in mind but don't forget about the function.**

These things need to pair up equally. For Example, for a feature that builds ad hoc email templates, the feature sentence could be, Create stunning, personalized thank you emails that inspire donors.

## Naming conventions for new forms product

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Feature name in Applinks menu:  
Donation Forms (New!)

Recommended subdomain:  
`give.donorperfect.com`

- Donor-centric language
- Aligns with existing naming conventions
- Can expand to multiple subdomains



## Naming conventions for new forms product

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Naming conventions: Use established naming conventions that apply donor-centric labels to donor-facing functionality.

### **What are we naming?**

Most Preferred: DonorPerfect Donation Forms

Alternatives: Donation Forms,  
DonorPerfect Forms, (DP) Donation Forms

Do Not Use: DPDF



# Style overview

Fundraising  
tools for fearless  
changemakers

GET STARTED



Form Name

- T** Form title  
Give your form a bold, eye-catching headline
- H** Section header  
Spotlight important sections on your form
- E** Descriptive text  
Add extra campaign information, event details, and more
- I** Image  
Show and tell by displaying an image on your form

Hero Image

Add a title here

I want to give\*

\$25

\$50

\$100

\$500

Other

Contact

First Name\*

Last Name\*

My Form

My Account

You have unpublished changes

Last saved at 3:00 PM

Publish now



Product Solutions Features Pricing

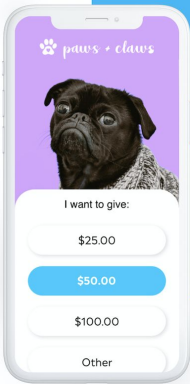
Login

GET STARTED

## Meet your fundraising success partner

Save time, raise money, and inspire donors with DonorPerfect, the #1 nonprofit growth platform for today's fearless changemakers.

GET STARTED

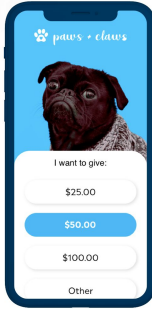
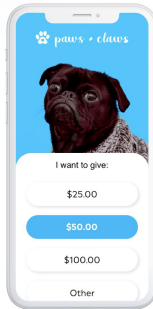


## Header - Bold & Dark

Paragraphs - Middle Blue grey

[Links to more content](#)

BUTTON CTA



# Colors



**Navy**

#003A63

(0, 58, 99)



**Blue**

#00B8F9

(0, 184, 249)



**Purple**

#BD9FE5

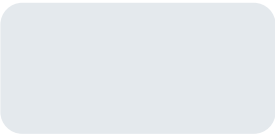
(189, 159, 229)



**Yellow**

#F4AE18

(244, 174, 24)



**Silver**

#E4E9ED

(228, 233, 237)



**Grey**

#5f5f5f

(120, 120, 120)

Primary: Blue

Secondary: Navy & Purple

CTA color: Yellow

Alert colors: Green & Red



**Headings: Graphik, Bold, Navy**

Text: Graphik, Regular, Grey

Links: Graphik, Regular, Blue

**CTA: Graphik, BOLD, WHITE, UPPERCASE**

## Design elements

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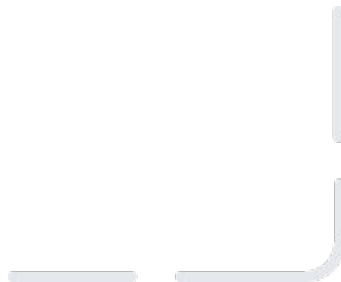


### Shadow

#072A44 op:10%

(7, 42, 68, 10)

Y:4 Blur:16



### Line Elements

Silver

6px width on screen

Approx 20px gap

Rounded stroke



### Border Radius

20px

If small shape use 10px to  
avoid object looking round



## Buttons

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A yellow rounded rectangular button with the text "GET STARTED" in white, bold, uppercase letters.

### Primary CTA

background: Yellow

text: Madera, white, bold, uppercase

Padding: 20px, 30px

Shadow: (0,0,0,40)

Y-2    blur-4

A yellow rounded rectangular button with the text "GET STARTED" in white, bold, uppercase letters. It has a subtle drop shadow.

### On hover

Shadow: (0,0,0,10)

A white rounded rectangular button with the text "GET STARTED" in yellow, bold, uppercase letters. It has a subtle drop shadow.

### Secondary CTA

background: white

text: yellow

# Font Awesome Pro



“



## Design a standout donor journey.

Grow meaningful relationships with engagement tools that personalize the donor experience.

[Learn More](#)



### Form title

Give your form a bold, eye-catching headline



### Section header

Spotlight important sections on your form



### Descriptive text

Add a story, campaign information, event details, and more



### Image

Show and tell by displaying an image on your form

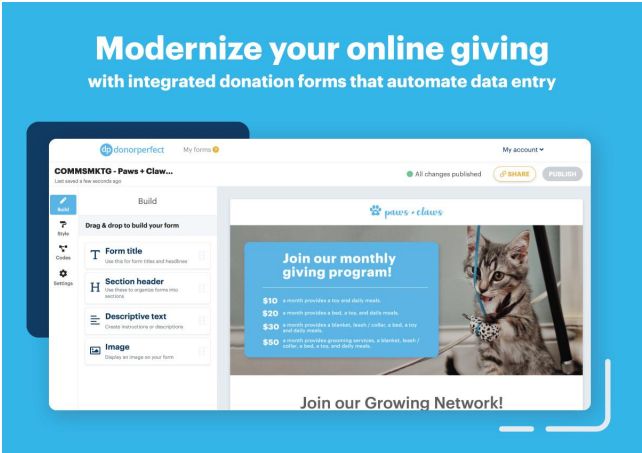
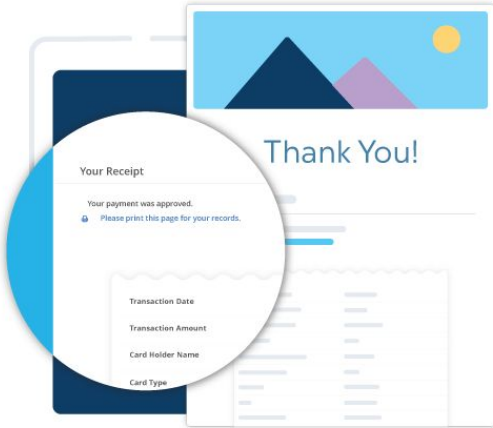
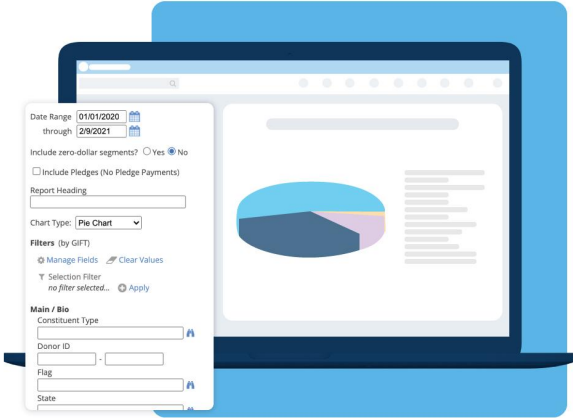
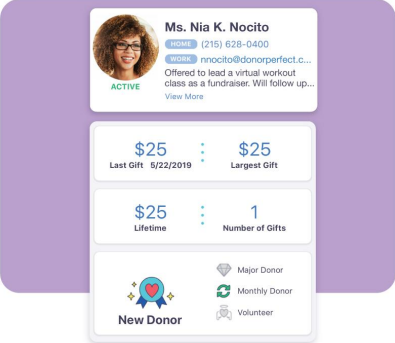
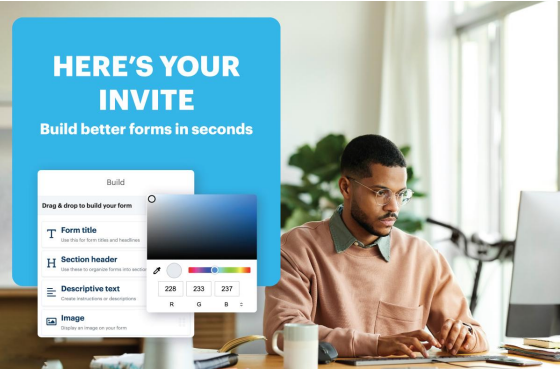
## STARTER

- ✓ Unlimited Forms
- ✓ Instant Receipting
- ✗ Crowdfunding
- ✗ Advanced Customization

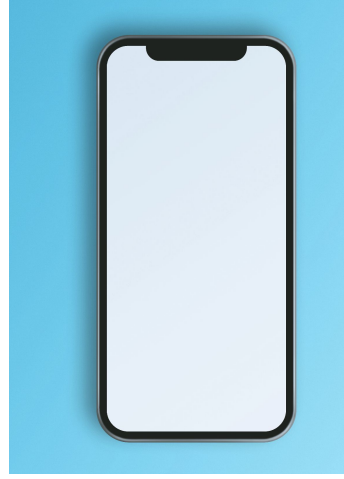
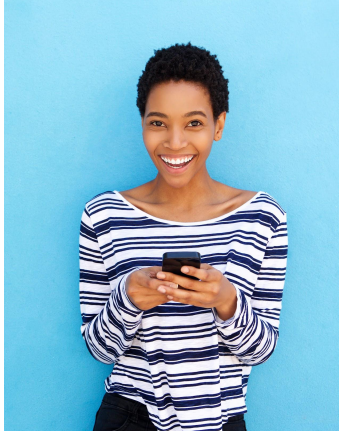
\$ 89.99 /mo

My Forms ▼

# Product illustrations



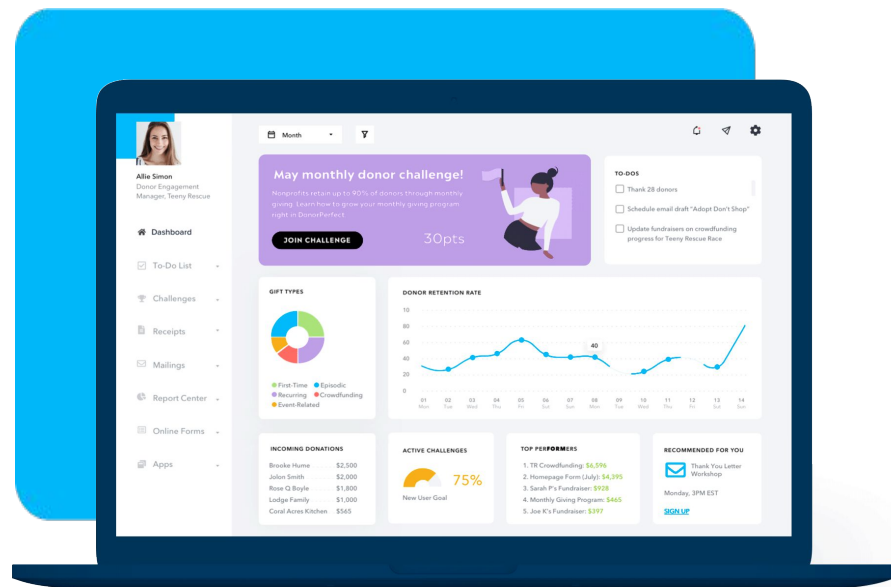
# Imagery



## Next steps: Bring the brand to life

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- Hand off standards to the UX and Dev Teams to apply the brand to DonorPerfect Donation Forms
- Plan how we can create a compelling brand experience that complements the intelligent CRM vision shown earlier (concepts are in draft phase)
- Begin to evolve our brand in current DonorPerfect and in our marketing materials (concepts are in draft phase)
- Continue collecting feedback from customers and iterating our approach as the brand is presented to them in DonorPerfect Donation Forms



## Partnership in practice

**Your fundraising success dashboard** serves as a central hub for our customers' most important metrics, the progress made toward them, and intelligent recommendations to help them improve their results, and ultimately, achieve their growth goals. It's home to:

- Growth in Giving metric/contributing metrics
  - GiG-boosting recommendations
- Personalized to-do list
- Challenge progress bar/upcoming challenges
- Recommended content: webinars, blog posts, guides, etc.



### Continue building relationships

**Your week in review** and **Your year to date** transforms our users into influencers who partner with us to enhance and innovate DonorPerfect for the good of the entire customer community. It can help us:

- Encourage users to stay invested in their growth
- Keep our finger on the pulse of customer satisfaction with continuous feedback and lessen the risk of survey fatigue
- Engage in new ways through:
  - Asking for feedback on specific features
  - Metric highlights and recommendations
  - Highlighting upcoming challenges
  - Did You Know? callouts about new features
  - Community group invitations
  - Calling for suggestions
  - Just for fun questions that can influence content



#### Your Week in Review

Happy Friday! Here's a snapshot of your progress from the week of May 26, 2019.

Active **5** days ↑ **3** from last week

Gained **126** donors ↑ **18** from last week

Gained **11** monthly donors ↑ **11**

Completed Challenges

May Monthly  
Donor Challenge



Now that we've covered you, how did we do? Rate your DonorPerfect experience this week.

EASE OF USE

☆☆☆☆☆

FEATURES

☆☆☆☆☆

RELIABILITY

☆☆☆☆☆

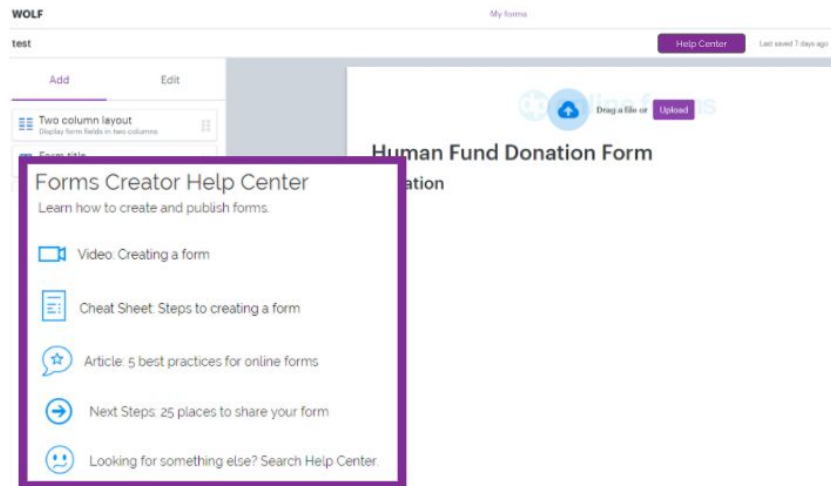
SUPPORT

☆☆☆☆☆

Feel free to provide additional feedback below.

SUBMIT

### HELP CONTENT VEHICLES FEATURE-BASED HELP CENTERS



## Partnership in practice

**Feature-based help libraries and in-product walkthroughs** meet our customers where they are with the information they need.

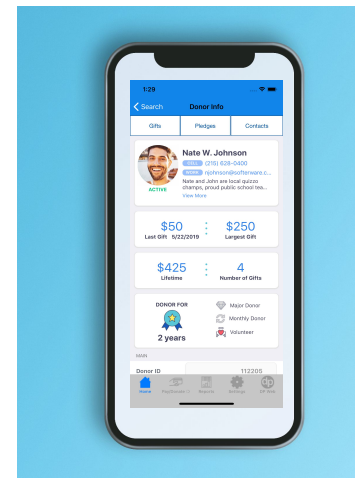
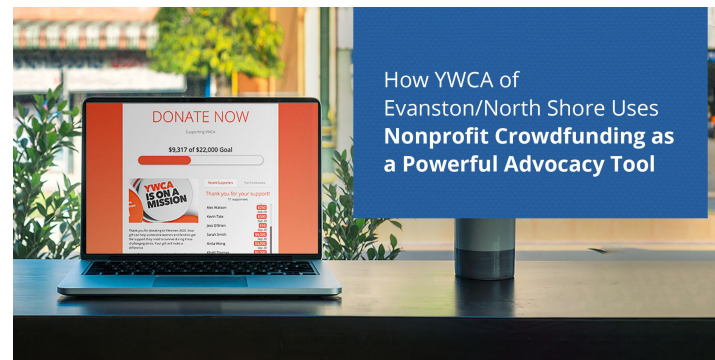
- Present help information in a variety of formats within the product to deflect cases and encourage use
- Expand the use of WalkMe (or other tool) to inform, assist, and encourage customers as they work in DonorPerfect
- Introduce updated in-product video content for features that garner the most support calls
- Future state: Beautifully styled in-product video walkthroughs featuring an expert who walks customers through a specific task or set of tasks and fundraising best practices (Skillshare/MasterClass quality)



### Continue building relationships

**Customer stories and content spotlights** delivered via WalkMe, Community, and a Fundraising Success Facebook Group that share the success of nonprofit community members as both fundraisers and changemakers.

- Fundraiser topics: fundraising, donor engagement, donor data management and reporting, board member engagement
- Changemaker topics: diversity, equity, access, inclusion, racial justice, social issues affecting the nonprofit sector
- Look at our products and marketing through a D+I lens (ex. diverse donor profiles, imagery, content themes, and interview subjects)
  - Future state: Implement 508/ADA compliant design/communication



Does the DonorPerfect brand refresh support our goal of aligning our success with the success of our customers?