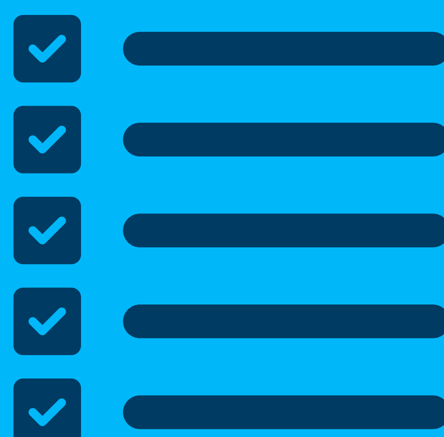
donorperfect

Your Data-Driven Donor Persona Checklist



Today's nonprofits can't rely on reaching every donor with a blanket approach or their fundraising efforts run the risk of feeling impersonal. Defining specific identities within your donor base allows you to provide tailored engagements that ring true with each supporter.

In your world, personas - profiles of your nonprofit's typical constituents - are defined by **who the donor is as a person:** their jobs, goals, challenges, and above all, what influences their giving behavior.

1) Identify your most valuable donor segments

Be strategic about which types of donors you really want to focus on. Start by selecting a group of donors that are meaningful **for a definitive reason**. Think carefully about the types of donors that matter most to *your* nonprofit, and narrow down your target audiences.

Talk to your team about future fundraising goals and priorities to pinpoint the information you'll need. Say you want to increase individual online donations by 25% over the next five years - segmenting your donors **by giving behavior** will provide the best insights.

Put simply, which types of donors would you like to see more of?

- Donors who gave in each of the last two years
- Donors who gave at least $500 last year
- Donors who gave to your capital campaign
- Donors who joined your monthly giving program
- Volunteers who also donated online

Comparing multiple sets of data in one report allows you to see where your donor lists intersect, and trim each group to your liking. By applying selection filters to your report, you can create a merged template (ex. major donors who give online) for emails and letters.

Your to-dos:

- [ ] Create segmented lists of donors based on giving levels, engagement, or retention.
- [ ] Trim data by recency, frequency, campaign, program, and/or donation method.
- [ ] Set clear and measurable goals to accomplish within a reasonable amount of time.

2) Enrich your donor behavior data with demographics

Next, enrich your donor behavior data with a source that provides attributes to describe your donors as people and consumers: their spending behavior, their lifestyle markers, their income bracket, and property ownership.

You can lean on **summary data sources** like social media and Google Analytics or dive deeper into publicly available donor data with **advanced tools** like DonorPerfect Insights, DonorSearch, iWave, or other solutions.

Donor data attributes may help you organize your donors by:

- Age / generation
- Gender identity
- Political affiliation
- Location
- Household income
- Value of home
- Home ownership
- Education
- Religion
- Wealth rating
- Marital status
- Interests
- Preferred contact method
- Giving capacity
- Career industry

Your to-dos:

- [ ] Enlist a data source to match donor groups with their attributes.
- [ ] Record your organization's overall attributes to identify trends.
- [ ] Calculate percentages and averages in a spreadsheet to synthesize information.

3) Collect interviews and surveys to validate your data

Your team and board members know your organization best, and of course your donors know themselves. Ask them to validate the data you've collected in a survey or interview to ensure it aligns with their experience.

Try inquiring with your staff who work closely with donors to see if your findings resonate, or adding a quick question to the bottom of your donation form to confirm key points with donors directly.

You might ask them:

- How strongly they agree or disagree with the information you've collected
- If certain demographics apply to them personally
- Their preferred methods of giving and communicating with you

Your to-dos:

- [ ] Conduct a quick survey allowing donors to validate your data.
- [ ] Schedule interviews with staff to ensure your findings ring true.
- [ ] Record your findings and adjust your collected data accordingly

4) Develop personas that match your growth goals

To build your donor personas, first, match your defined segments with your growth goals - i.e. match tech-savvy millennial donors with your goal to increase individual online donations over the next few years.

Then empathize with your donor groups - **turn them into real people** ("personas") you can visualize when deciding how to best engage with them. Create a profile based on your vision with a fictional name, photo, and short bio about their life to represent each donor segment.

Persona Name:

NETWORKER NICOLE

DONOR PERSONA

Segment: **Gave $1,000 each of the last two years**

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.**

When developing your donor personas, consider the following:

- What types of media do they interact with in their daily lives?
- What are their motivations to support your organization?
- What do they want to accomplish in their personal and professional lives?
- What gets in their way?

Your to-dos:

- [ ] Develop 3-5 personas using trends and patterns found in your validated data.
- [ ] Research your nonprofit sector to strengthen and modernize your personas.
- [ ] Create mock profiles for each defined persona with names, photos, and bios.

5) Develop engagement initiatives to grow relationships

A lapsed direct mail donor will require very different messaging than a frequent tech-savvy donor. Based on your data and research, determine which engagement initiatives and fundraising campaign ideas are appropriate for each persona. Think about impact stories, peer-to-peer initiatives, event spotlights, and exciting sponsorships.

For example:

- To effectively communicate with major donors, it's appropriate to use the methods that require the most effort - phone calls, face-to-face meetings, galas, and tours of your facility - to show utmost appreciation for their commitment. And leadership storytelling is vital for fundraising executives - have a director, executive, or board member reach out, rather than contacting them through social media or email.
- **Millennials** are active on their phones and respond best to text messages and social media, but rarely check personal email or respond to voice calls. A text message invite to a happy hour or webinar you're hosting could go a long way.

To tailor your communications even further, you can look at which social media platform is the best fit for each persona.

Your to-dos:

- [ ] Compare your industry research with your validation survey results.
- [ ] Audit your list of outreach efforts to include fresh ideas and discontinue stale ones.
- [ ] Match each donor persona with 3-5 appropriate engagement initiatives.

6) Track the success of your persona-driven outreach

Not everyone is going to fill out your validation survey or have time for an interview. Not to mention, your basic assumptions about particular donor groups could be incorrect.

For example, it's not necessarily true that older donors don't give online. Baby Boomers answer voice calls, check email regularly, and also use text messaging and social media. Studies show that although they are initially slow to adopt new technology, members of this very generous generation take to it quickly once they do.

Be sure to **reference the goals you set at the beginning** of this process to see if you're on track to meet them on time.

For example, if sending out different versions of the same mailing, you'll want to code each one to correspond to a specific campaign or solicitation. This helps you know which gifts resulted from that specific outreach effort, so that your gift data will accurately reflect the diverse mailings. To track your progress, a solicitation analysis report can show your ratio of responses, return on investment, and more.

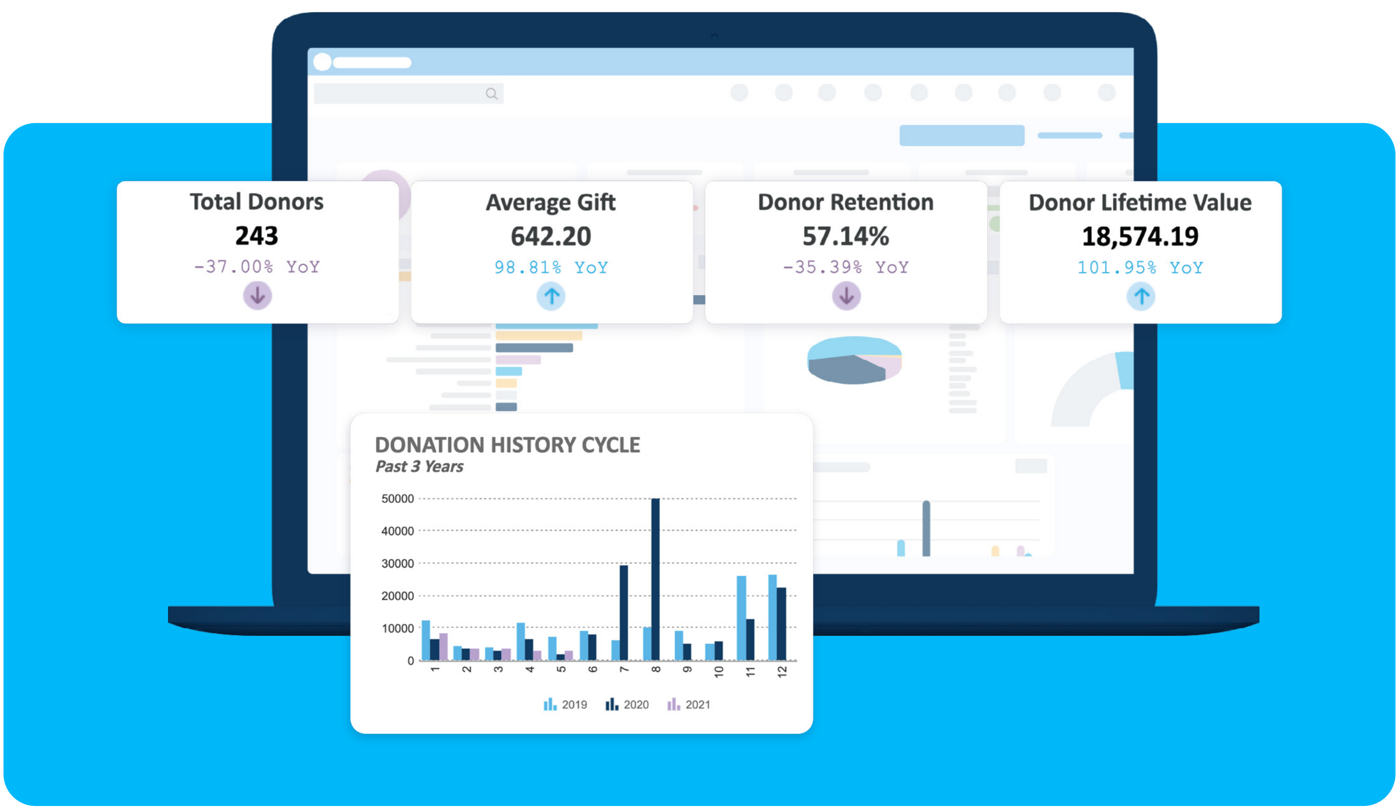
Your to-dos:

- [ ] Code your outreach efforts to determine success accurately and distinctly.
- [ ] Try A/B testing through your CRM to track open and click-through rates.
- [ ] Compare your campaign revenue year over year to measure your growth.

By personalizing your approach, you'll be more likely to capture - and hold - the attention of your donors. People appreciate deep human connections, and the more you can effectively create them, the more your donor base will feel like a community.

Craft Your Community + Optimize Your Outreach with DonorPerfect

For a limited time, get a free Donor Snapshot with the purchase of DonorPerfect Visit donorperfect.com/demo to get started.



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