



B-SIF

Donor Journeys

Discussions

- One-on-one calls: <https://calendly.com/irfan-bashir-shah>
- Give India 100 Heroes
- Supporting Toolkits from Daan Utsav and GivingTuesday
- Attendance and fee installment comms

Give's 100 Heroes Campaign



- Form to onboard on Give's platform: <https://bit.ly/NGORF>
- 15 Lakh for 1st placed NGO
- Top 100 NGOs get matching rewards
- Weekly matching rewards also besides matching rewards for top 100
- Time Frame: 2nd October to 24th November
- Have minimum 15 supporters to be eligible
- They will share T&Cs document
- Daan Utsav Carnival (October 2nd to October 8th): 15% booster match every day for top 5 NGOs (this is in additional to central rewarding scheme for top 100 NGO)
- Need to fill a form to get an Relationship Manager assigned: <https://forms.gle/WXXuwHpy2jQtb4wg7>
(enter registered name of NGO as is marked on Give's website)
- Contact hrishi@give.do for onboarding queries
- Give will also provide a communication kit
- Matching donations will be for existing fundraisers as well, but only donations during the Hundred Heroes window will be counted.

Give's 100 Heroes Campaign



100 Heroes: Central Rewarding System



NGO Rank	Matching Reward	Minimum supporters (qualifying criteria for reward)
1	100% upto INR 15 lakh	15
2	50% upto INR 10 lakh	15
3	50% upto INR 7.5 lakh	15
4	30% upto INR 5 lakh	15
5	30% upto INR 4 lakh	15
6	30% upto INR 3 lakh	15
7	30% upto INR 2.5 lakh	15

Give's 100 Heroes Campaign



100 Heroes: Central Rewarding System



NGO Rank	Matching Reward	Minimum supporters (qualifying criteria for reward)
8 - 15	25% upto INR 2 lakh	15
16 - 30	20% upto INR 1.5 lakh	15
31 - 60	15% upto INR 1 lakh	NA
61 - 100	10% upto INR 50,000	NA

Give's 100 Heroes Campaign



Booster Incentive: Daan Utsav Carnival



- Funds raised by NGOs during the Daan Utsav week- October 2nd (00:00 hrs) to October 8th (23:59 hrs) will **also** be considered towards Daan Utsav Carnival
- NGOs **raising a minimum of INR 50,000** shall be rewarded with a **15% match up to INR 50,000**, over and above the rewards won under the central rewarding system of '100 Heroes'
- Additionally, NGOs that finish in the **top 5** on each day (October 2nd-8th) will get a bonus booster reward.
- The reward won under Race to a Lakh is ~~a guaranteed reward and shall not be withdrawn~~ basis your final ranking in the event

Topics Covered

- Intro to CRM
- Building linear donor journeys
- Creating branched donor journeys
- Segmenting donor journeys
- Executing donor journeys
- Building flexibility into donor journeys

What's a CRM?

A Customer Relationship Management (CRM) system is a technology used to manage an organisation's interactions and relationships with current and potential donors. It uses data analysis about a donor's history with an organisation to improve donor relationships, specifically focusing on retention and ultimately driving donation volumes.

Main Functions:

Data Management

Interaction Tracking

Lead Management

Sales Automation

Analytics and Reporting

Building Linear Journeys

Classic Journey



Building Linear Journeys



Step 1: Gratitude (Month 1):

Send a personalized greeting message expressing gratitude for their previous donations. This message should include a warm thank you and a recognition of the impact their donations have made so far.



Your generous donation didn't just send Roohi to school it ignited a beacon of hope, forever transforming her future.
Thank you for making this profound difference.

Step 2: Survey (Month 2):

Distribute a brief survey asking about their experiences with Bhumi and their motivations for giving. This could include questions about why they chose our organization, what they liked about the donation process, and what causes they are most passionate about. Through this we can understand how they decide to make a donation and what our some of the campaigns they would like to participate for their next donation.

EMAIL

suresh.singh@gmail.com

MESSAGE

Dear Donor,

Your invaluable support has enabled Bhumi to provide scholarships to thousands of underprivileged children, forever changing the trajectory of their lives. We would be grateful if you could spare a few minutes to answer this survey, which will help us understand your giving journey better and shape our future programs effectively.

"Surveys show that surveys never lie." -
Natalie Angier

How did you first learn about Bhumi's Bring Smile Scholarship program?

Word of mouth
Social Media
Email
News article
Other (please specify)

What motivated you to donate to this specific cause?

Personal experience
Belief in the importance of education
The impact of COVID-19 on education
Other (please specify)

Would you be interested in receiving updates about the progress of the students you've sponsored?

Yes
No

How likely are you to donate to Bhumi's Bring Smile Scholarship program again in the future?

Very likely
Somewhat likely
Unsure
Not very likely

Would you consider setting up a recurring donation to Bhumi's Bring Smile Scholarship program?

Yes
No
Maybe, I need more information

Are there any other causes at Bhumi you would be interested in supporting?

Do you have any suggestions or feedback to improve our donor communication or program implementation?

Building Linear Journeys



Step 3: Impact Report (Month 3):

Share a detailed impact report showing how their donations have been used and the tangible changes they have helped to bring about. Include personal stories, photos, and quotes to make it more engaging and relatable. Like if they supported with donations for Beach Restoration Project then a photo of actual volunteers working on cleaning beach and if they live close to the area of the beach then we can also include a map to that beach and say visit the beach to see the change. A drone shot can be captured from previously it was this now it is this.

We are delighted to share with you the remarkable impact your generous donation has made towards the Beach Restoration Project. Your support has turned this once polluted beach into a safe, clean, and beautiful environment for our community and the diverse wildlife that call it home.



Before

One of our devoted volunteers, Harsh, shared his experience: "Seeing the transformation of the beach was incredible. What was once littered and discarded is now clean, vibrant, and teeming with life."

We warmly invite you to visit the beach (Location: [insert map]). See the difference that your support has made.



After



Step 4: Ongoing Communication (Months 4-5):

Maintain regular communication through newsletters, emails, or social media updates. Highlight ongoing projects, success stories, and upcoming events. This will keep donors engaged and informed about our organization's work.

SUBJECT

Bhumi Scholarship: A Success Story in the Making

MESSAGE

Dear Donor,

Meet Ram, a Bhumi scholarship recipient. Once struggling with school fees, he's now thriving in his studies, recently topping his class in mathematics. Your support is transforming lives like Ram's every day. Thank you!



Building Linear Journeys

Step 5: Special Recognition (Month 6)

Recognize and celebrate the donor's continued support. This could be a personalized certificate of appreciation, a shout-out in a newsletter, or a small token of gratitude.

The Story of ur first donation.

A Life Changed Forever

Remember your first donation? It reached little Anil in a shelter home. Once unsure of his future, your generosity provided Anil with the tools for education. Today, he's a confident student with dreams of becoming a doctor. Your gift continues to shape his bright future.

Step 6: Exclusive Event Invitation (Month 7):

Invite donors to an exclusive event, such as a webinar, a virtual tour, or a meet-and-greet with your team. This can make them feel more connected with your organization and its mission.

Step 7: Encourage Recurring Donation (Month 8):

Encourage them to set up a recurring donation to continue supporting the program. Highlight the ongoing needs of the program and the sustained impact their support could have.

Subject

Be the Lasting Change: Pledge Your Recurring Support Today

Message

Your ongoing generosity can create transformative waves of change in countless lives. With a recurring donation, you'll ensure Bhumi's initiatives continue to uplift and empower those who need it most. Begin a ripple of change - Donate today!

Building Linear Journeys

Step 8: Encourage Refers (Month 9):

In this step, the aim is to create campaigns that encourage existing donors to bring their family members and friends on board to support Bhumi's various causes. By designing campaigns like a "donor chain" or "tree of donation," donors can see the growing impact of their contributions and how their network's involvement can amplify the results. This approach not only helps expand the donor base but also fosters a sense of community and shared purpose, turning charitable giving into a habit for both the original donors and their referrals.

Chain of Kindness



Step 9: Personal Outreach (Month 10):

Conduct personal outreach, such as a phone call or a personal letter, expressing gratitude for their support over the year and inviting them to continue their partnership in the following year.

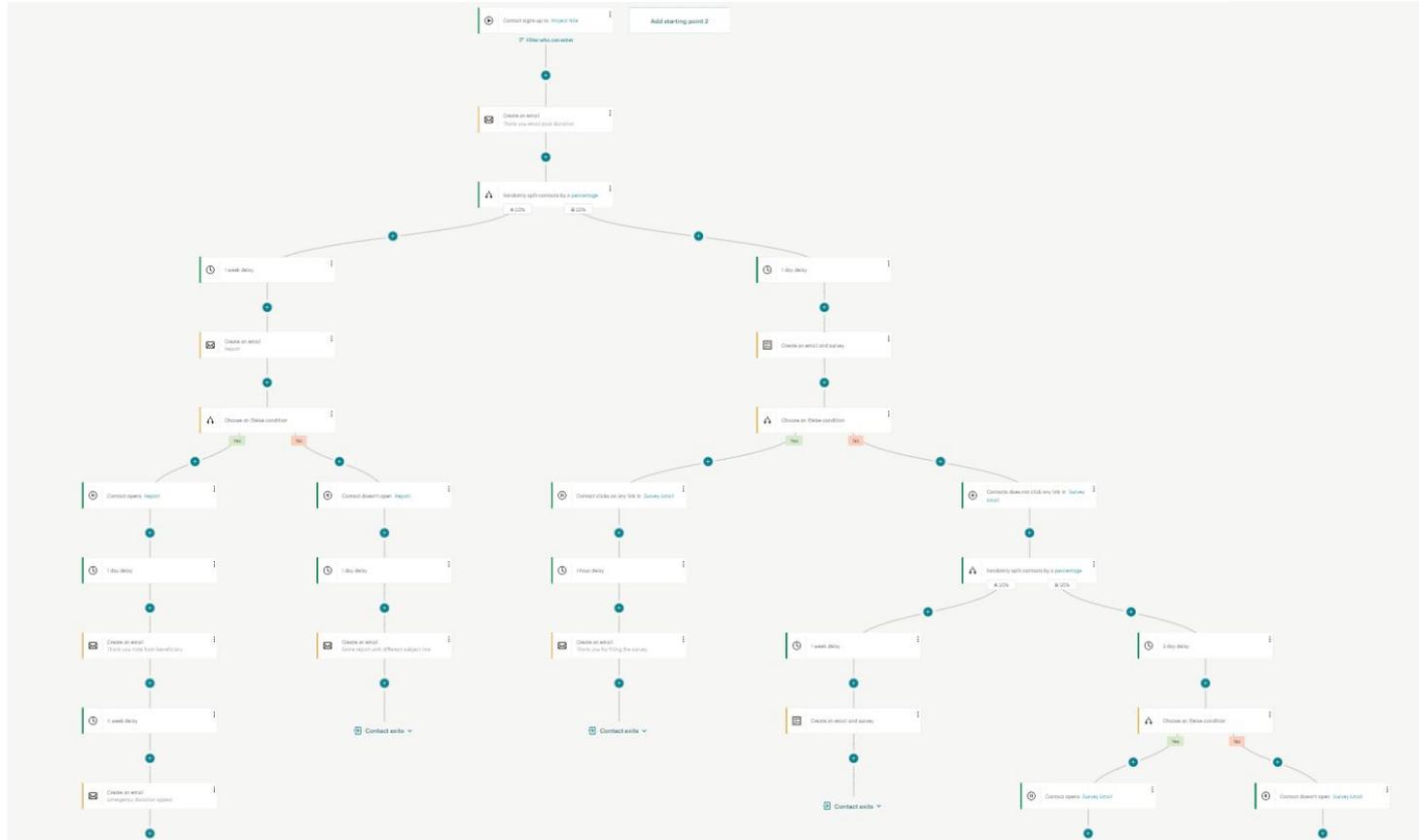
Step 10: Year End Campaign (Month 11):

Include the donor in a year-end giving campaign. Highlight the importance of their continued support and how their further contribution can make a difference.

Step 11: Yearly Impact report (Month 12):

Share a comprehensive yearly impact report. Highlight the milestones reached over the year, the changes brought about with their help, and the goals for the upcoming year.

Building Branched Donor Journeys:



Branched Donor Journeys: Automation

Creating an automated email journey involves setting up a series of emails that are sent out based on specified triggers, actions, conditions, and filters. The goal is to engage customers at various touchpoints in their customer journey, with relevant content at the right time.

It's dynamic as the next email they see depends on their level of engagement with your campaign.

Branched Donor Journeys: Key Elements

Entry Points (Triggers):

- Sign-up or Registration: When a user signs up for an account, newsletter, or service.
- Purchase: When a user makes a purchase.
- Website Behavior: Visiting specific pages, spending a certain amount of time on the site, etc.
- Event Attendance: Registering for or attending a webinar, workshop, etc.
- Date-based: Birthdays, anniversaries, or other significant dates.
- Segmentation: Entering a specific segment like "high-value customers" or "inactive users."

Rules:

- Segmentation: Grouping users based on behavior, demographics, purchase history, etc.
- Engagement Level: Sending different emails based on how engaged a user is (e.g., open rates, click-through rates).
- Frequency Capping: Limiting the number of emails a user receives in a given timeframe.
- Exits: Conditions under which a user is removed from a journey (e.g., after making a purchase in a lead-nurturing journey).

Actions:

- Send Email: The primary action in an email journey.
- Wait: Pausing the journey for a set period or until a specific condition is met.
- Conditional Split: Sending users down different paths based on behavior, engagement, or other criteria.
- Update Contact Data: Modifying user data based on journey interactions (e.g., updating a lead score).
- Add to List/Remove from List: Changing the user's list or segment based on journey interactions.

Content Personalization:

- Dynamic Content: Content that changes based on the recipient's data or behavior.
- Product Recommendations: Based on browsing or purchase history.
- Location-based Offers: Tailoring offers based on the user's location.

Feedback Loops:

- Open Rates: Monitoring how many recipients open the email.
- Click-through Rates (CTR): Monitoring how many recipients click on links within the email.
- Conversion Rates: Monitoring actions taken after clicking, such as making a purchase or signing up.
- Unsubscribe Rates: Monitoring how many recipients opt out of receiving further emails.

Exit Points:

- Goal Completion: The user completes the desired action (e.g., making a purchase).
- End of Journey: The user has received all emails in the journey.
- Opt-out: The user unsubscribes from emails.

Post-Journey Actions:

- Re-engagement: Targeting users who completed a journey but didn't convert.
- Feedback Surveys: Asking users for feedback on their journey experience.
- Cross-sell/Upsell: Promoting other products or services

Branched Donor Journeys: Key Elements



Let's build one from scratch...

Segmenting Donor Journeys:

- Regular donors (broadcast groups, linear email journeys)
- Potential recurring donors (broadcast groups, automated journeys)
- Recurring donors (Glific journeys, automated journeys, call)
- Abroad donors (automated donor journeys)
- HNIs (DM, automated and personalized journeys, calls)
- UHNIs (relationship manager, calls, DMs, personalized emails, video calls)
- Institutional donors (need-basis email updates, newsletters, video calls, DMs)

Executing Donor Journeys: Major Tools

1. **Sendy**
 - > Great for starters and linear (manual) email journeys
 - > Cheapest tool on the market

2. **Mailchimp**
 - > Great for building automated email journeys
 - > Pocket friendly
 - > Free tier available

3. **HubSpot**
 - > More complex automations and analytics
 - > Suitable for medium sized NGOs with donor database in excess of 10,000
 - > Free tier available

4. **Salesforce Marketing Cloud**
 - > Long learning curve; AI support; all sorts of automations and donor insights
 - > Suitable for enterprise level NGOs with donors 50k+ donors and large sales and marketing teams
 - > Extremely expensive

5. **Freshsales**
 - > Great for startups due to their startup program
 - > At par with Salesforce Marketing Cloud
 - > Very pocket friendly via the startup program

Content types



1. Welcome emails
2. Thank you emails
3. Reactivation emails
4. Impact reports
5. Monthly/Quarterly/Annual reports
6. Newsletters
7. Milestone updates
8. Program updates
9. Referral emails
10. Donation requests
11. Recurring donation appeals
12. P2P participation request
13. Beneficiary messages
14. Current events for participation
15. Survey
16. Feedback
17. Felicitations
18. Engagement appeal
19. Decision table forum
20. Follow Ups
21. Vision/mission statement
22. Shoutouts
23. Beneficiary report
24. Inspiring stories
25. Tax deductions
26. Receipts
27. Volunteering invitation
28. Site visit or event invites
29. Occasion emails
30. Birthday wishes

Building Flexibility in Donor Journeys

- Higher the ticket size more the customization
- Automation till conversion into recurring donor
- It's okay to breakout of the journey
- More emails = more actions
- Either work on conversion rate or scale
- The best journeys are omnichannel
- Retargeting works
- Timing is more important than the journey



Next Masterclass:

Effective Retail Fundraising Strategies



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Thank You!