



Shuffling your Donor Engagement Strategy with a Fresh Approach

Hello!

I'm Julia Gackenbach,

DonorPerfect Nonprofit Advocate.



What would you like to see in 2025?

More first
time gifts



More
participation



Higher
retention



Expand
audience

FUNNEL



More first
time gifts



More
participation



Higher
retention



Expand
audience

Meet your modern engagement models

FUNNEL



More first
time gifts

PYRAMID



More
participation

Higher
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Expand
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FUNNEL



More first
time gifts

PYRAMID



More
participation

LOOP



Higher
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More first
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PYRAMID



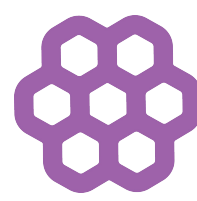
More
participation

LOOP



Higher
retention

NETWORK



Expand
audience

Meet your modern engagement models

FUNNEL



More first
time gifts

PYRAMID



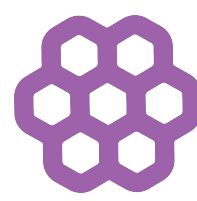
More
participation

LOOP



Higher
retention

NETWORK



Expand
audience



What is different about these models?

- Different engagement models for different goals
- Importance of relationship
- Clear path of conversion



Big questions:

- What are the desired conversion points?
- How do we move individuals or segments to those conversion points?



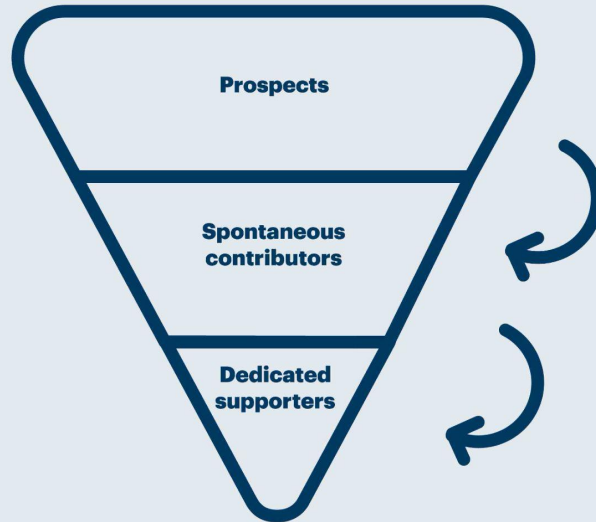




More first time gifts

More perspective donors
become active donors

The Donor Engagement Funnel





DONOR PROFILE

Phillip Dickens

Age: Mid-50s

Housing: Suburban upper-middle-class home with many rooms including an office

Family: Married with high-school age children, family of origin nearby

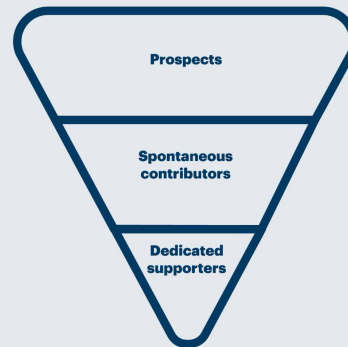
Employment: VP of Talent at a medical staffing company

Giving Activity: Highly visible in philanthropic circles, attends events, his company gives but he does not individually give

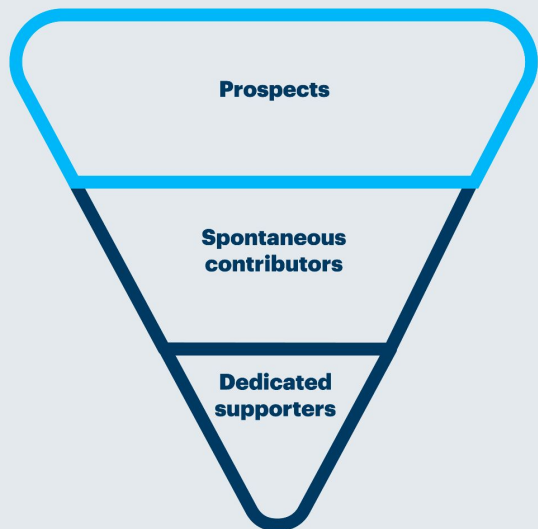
Values: Metrics, outcomes, vision, and recognition

About: Well connected family, all of whom are active in partnership with our organization

Overall Conversion Goal: Move from prospect to monetary supporter



The Donor Engagement Funnel



9

Funnel
Convert new supporters

Chat with a potential donor about a new initiative.

Funnel
Convert new supporters

6

10

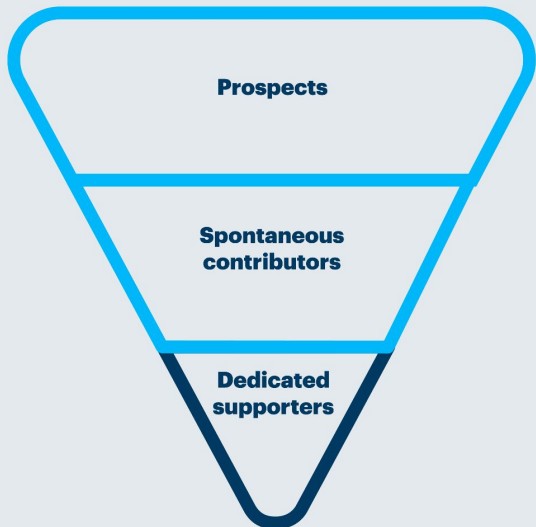
Funnel
Convert new supporters

Offer a tour of your facilities or mission work.

Funnel
Convert new supporters

10

The Donor Engagement Funnel



A Funnel
Convert new supporters

Create an email welcome series for new donors.

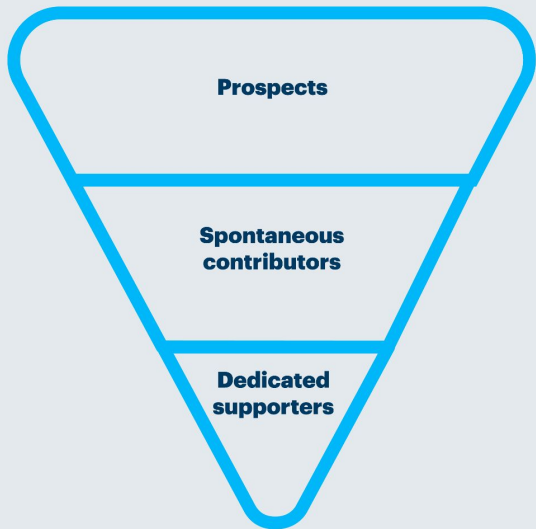
Funnel
Convert new supporters **A**

8 Funnel
Convert new supporters

Brainstorm ideas for a crowdfunding campaign.

Funnel
Convert new supporters **8**

The Donor Engagement Funnel





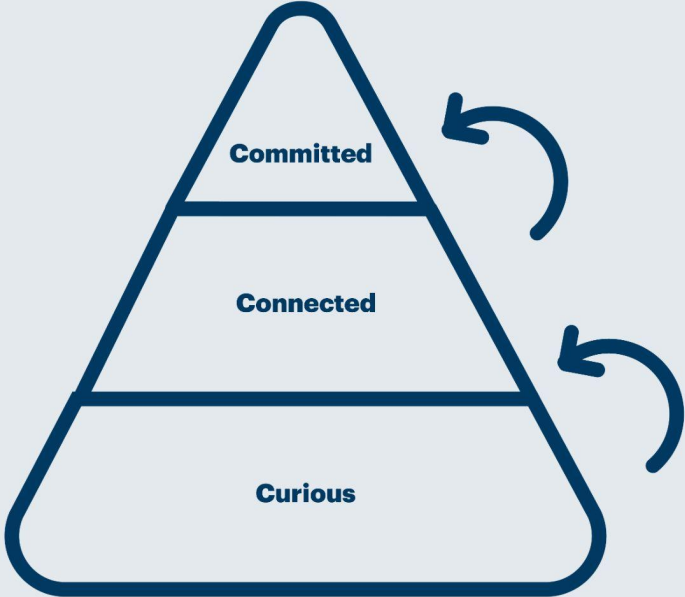
More participation

Strengthen relationships

**Connection goes
beyond** (and often comes
before) **contribution.**



The Donor Engagement Pyramid





DONOR PROFILE

Aaron from Sage Pools

Age: Early 40s

Housing: Gated community with custom pool, also has a vacation home in the keys

Family: Married with two kids, lives near his parents

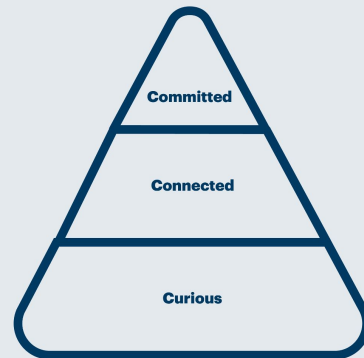
Employment: Owner of Sage Pools, succeeding his father

Giving Activity: Good friends with former Executive director, philanthropic individually and through company, still gives to events we throw but doesn't attend

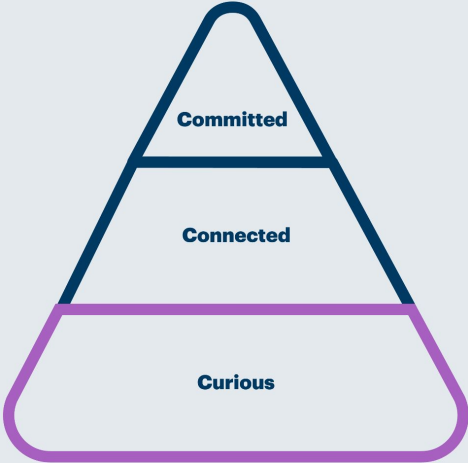
Values: Family legacy, community engagement, and work-life balance

About: Sage Pools is a well-known in the area, Aaron is known as a family man and can be found on the weekend coaching his kids sports teams or hosting a community BBQ

Overall Conversion Goal: Show reignited interest by attending an event



The Donor Engagement Pyramid



4 **Pyramid**
Increase participation

Assign a team member to a target donor group.

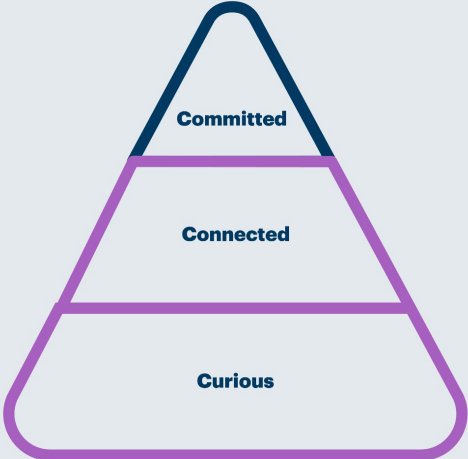
4 **Pyramid**
Increase participation

3 **Pyramid**
Increase participation

Create a survey to learn more about your donors.

3 **Pyramid**
Increase participation

The Donor Engagement Pyramid



J

Pyramid
Increase participation

Brainstorm ideas for a small, intimate donor appreciation event.

Pyramid
Increase participation

J

Q

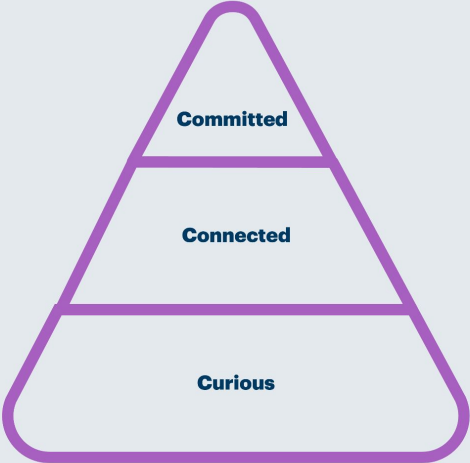
Pyramid
Increase participation

Invite select donors to a strategic planning discussion.

Pyramid
Increase participation

Q

The Donor Engagement Pyramid



A stack of five cards, numbered K, 3, J, 10, and 2 from top to bottom. Each card features a purple background with white text and icons. The cards are slightly overlapping and tilted to the right.

- Card K:** Features a fountain pen icon and the text "Part business".
- Card 3:** Features a speech bubble icon and the text "Create learn you".
- Card J:** Features a speech bubble icon with the text "Brainst small, appr".
- Card 10:** Features a speech bubble icon and the text "Share descripti monthly".
- Card 2:** Features a speech bubble icon and the text "Add a beneficiary's story to your donation form.".

Each card also includes the text "Pyramid participation" and "Increase participation" in smaller font.

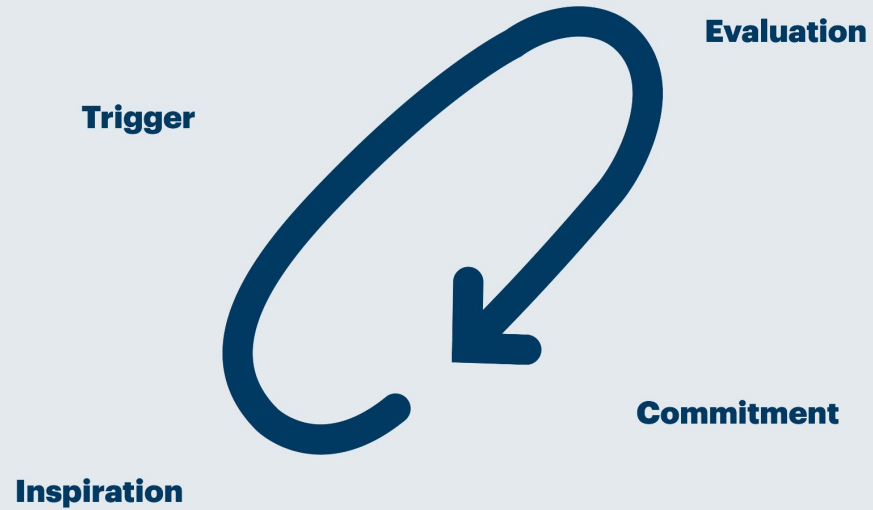
Engagement Model 3: The Loop



Higher retention

Receive the next contribution

The Donor Engagement Loop



Keeping supporters in the loop

- Inspiration
- Trigger
- Evaluation
- Commitment





DONOR PROFILE

Devin Stone

Age: 20s

Housing: Rents a modest apartment with a roommate

Family: Single, very close to her sister

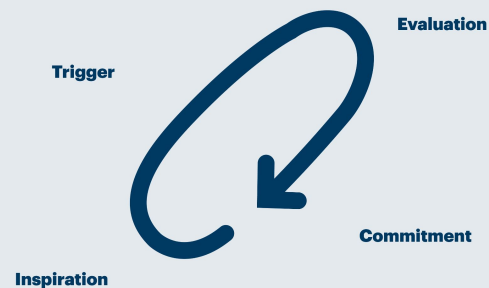
Employment: Marketing coordinator

Giving Activity: Mostly contributes her time but occasionally gives <\$100 gifts, especially when they are matched

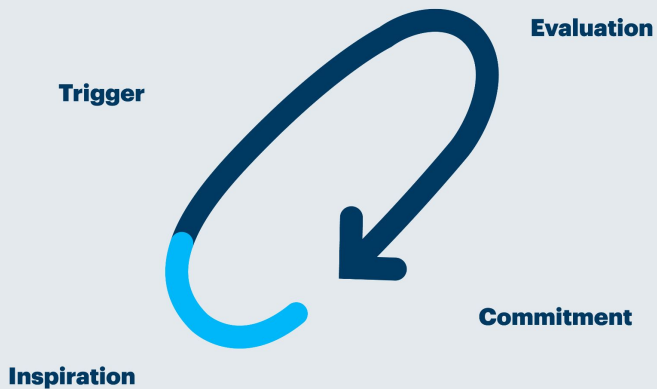
Values: Creativity, social responsibility, youth empowerment

About: An engaged young professional who is mission-driven, tech-savvy, and was heavily impacted by mentorship programs when she was in school

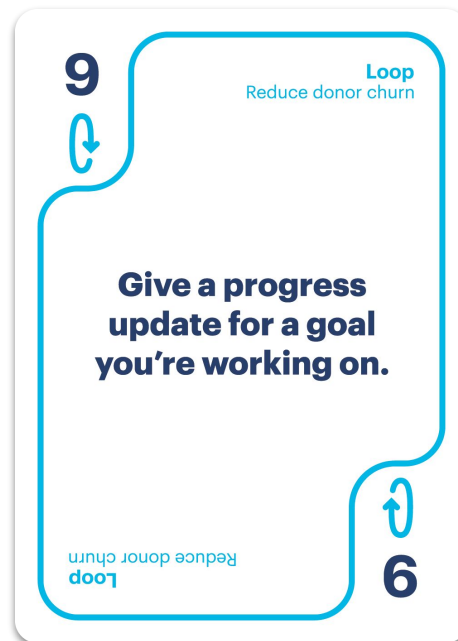
Overall Conversion Goal: Commitment to volunteer next year



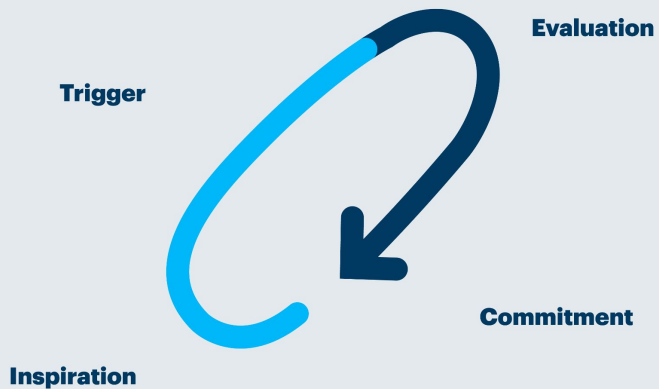
The Donor Engagement Funnel



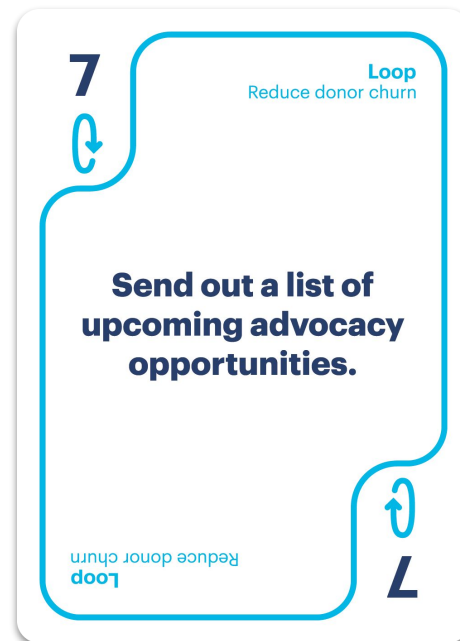
dp donorperfect



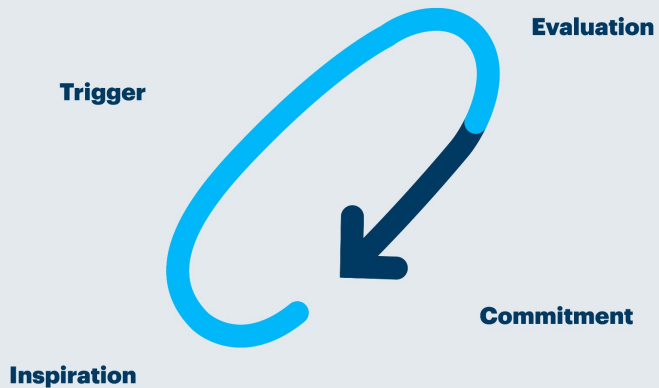
The Donor Engagement Funnel



 donorperfect



The Donor Engagement Funnel



dp donorperfect

2

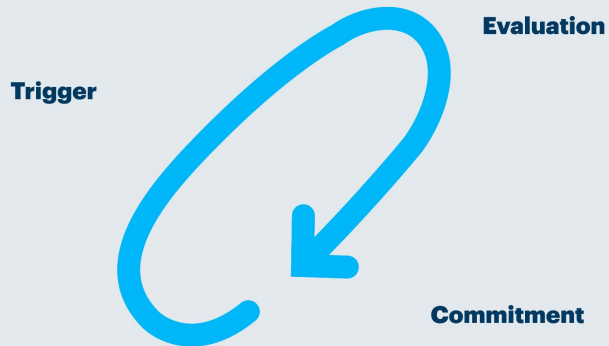
Loop
Reduce donor churn

Ask a committed donor out for coffee or lunch.


Loop
Reduce donor churn

2


The Donor Engagement Funnel




 donorperfect


3  **Loop**
Reduce donor churn

Call a recent donor to share the impact of their gift.

3  **Loop**
Reduce donor churn

K  **Loop**
Reduce donor churn

Establish multi-year pledge options with tiered recognition.

K  **Loop**
Reduce donor churn



Expand audience

Gain contact information for
new potential donors

The Donor Engagement Network

Individuals



Broadcasters

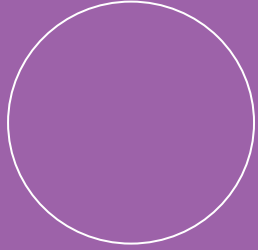
Socializers

Partners

Supporters you can rely on

- Individuals
- Socializers
- Broadcasters
- Partners





DONOR PROFILE

Age:

Housing:

Family:

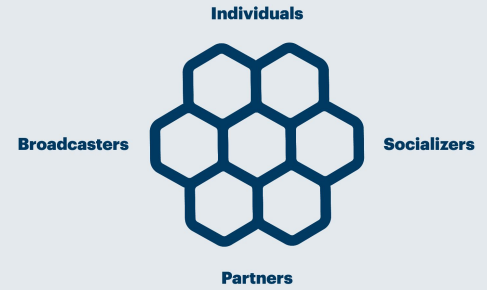
Employment:

Giving Activity:

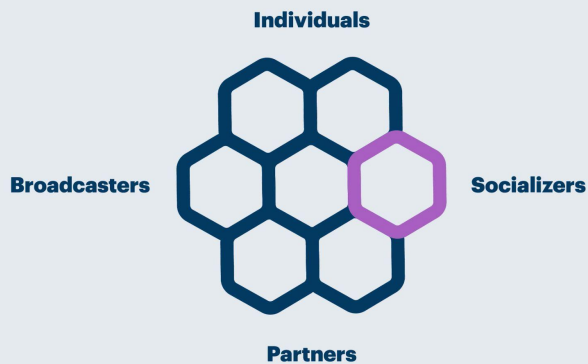
Values:

About:

Overall Conversion Goal:



The Donor Engagement Network



6

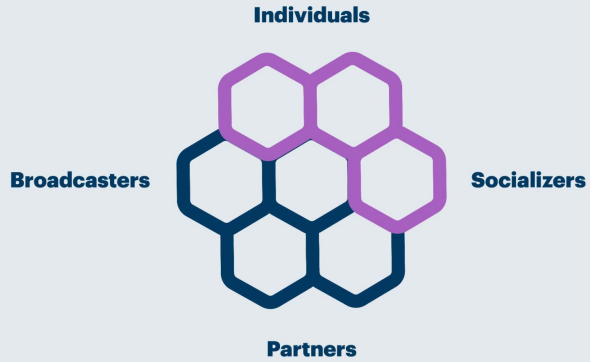
Network
Gain new contacts

Ask board members to list contacts who fit your donor personas.

9

Network
Gain new contacts

The Donor Engagement Network



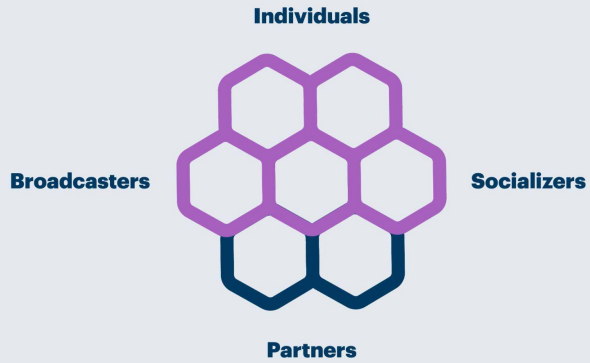
3 Network
Gain new contacts

Brainstorm referral incentives for new donors or volunteers.

Network
Gain new contacts

3

The Donor Engagement Network

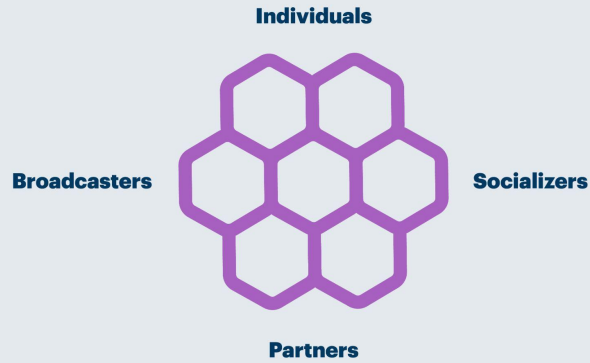


Q **Network**
Gain new contacts

Host a networking event to introduce people to your nonprofit.

Network
Gain new contacts

The Donor Engagement Network



2

Network
Gain new contacts

Brainstorm ways to involve partners in your next campaign.

2

Network
Gain new contacts

FUNNEL



More first
time gifts

PYRAMID



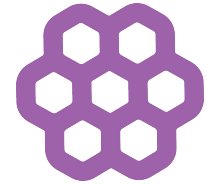
More
participation

LOOP



Higher
retention

NETWORK



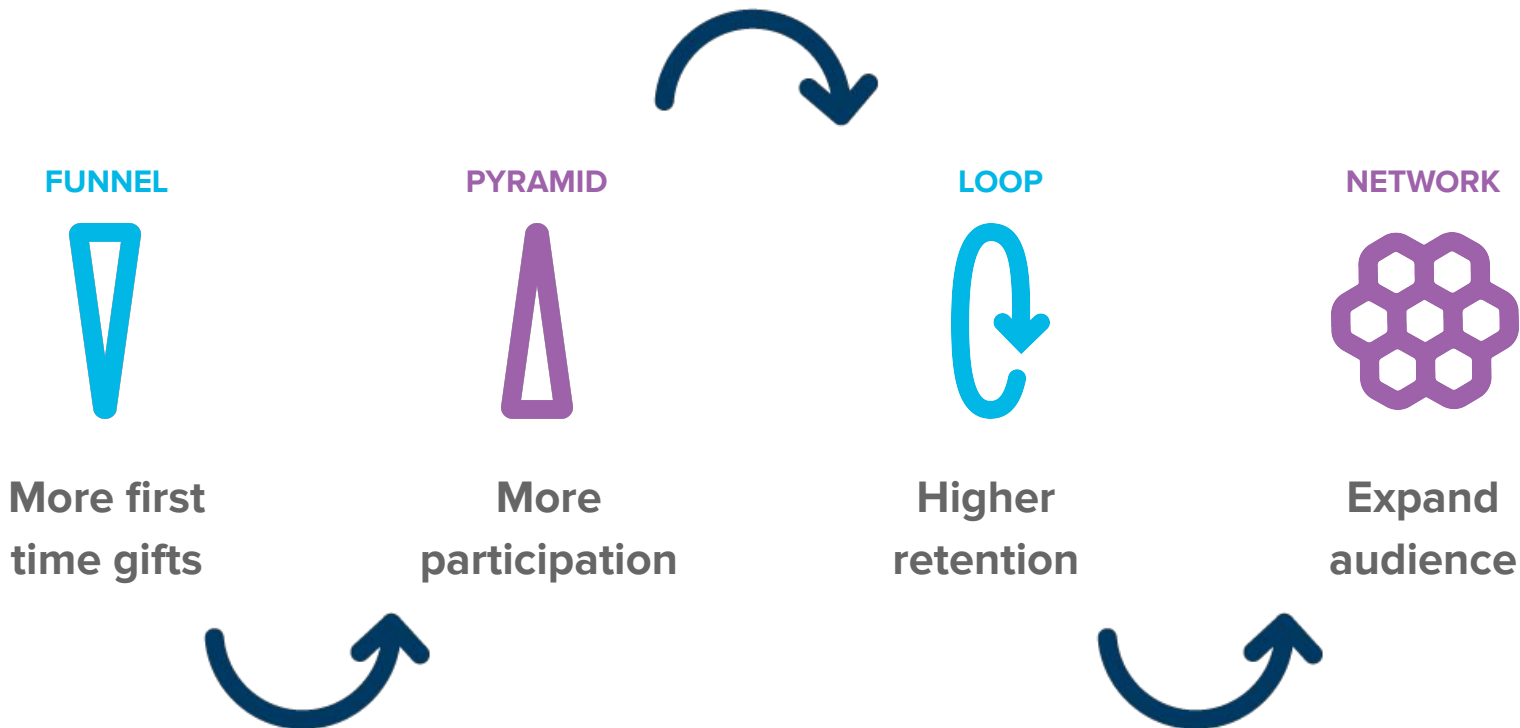
Expand
audience

Big questions:

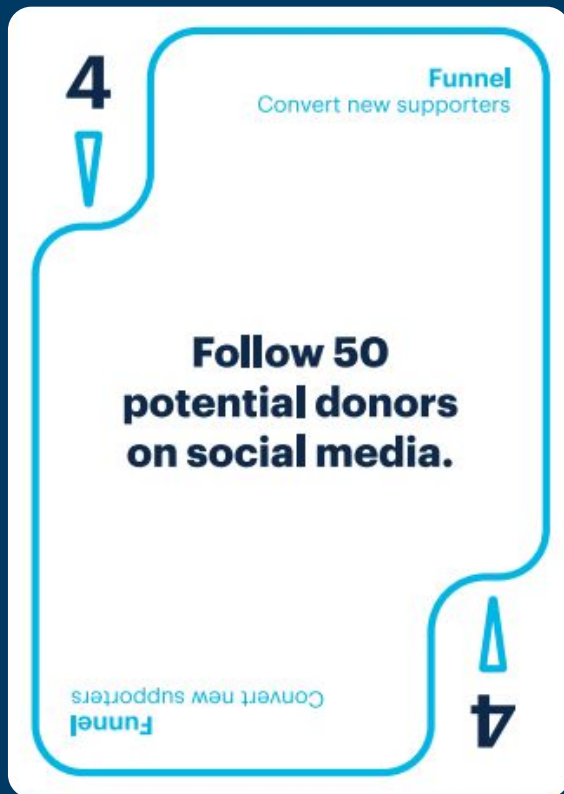
- What are the desired conversion points?
- How do we move individuals or segments to those conversion points?



Meet your modern engagement models



Let's play a game: **PICK A CARD, ANY CARD**



Let's play a game: **HIGH / LOW**


3

Pyramid
Increase participation

Create a survey to learn more about your donors.

3

Pyramid
Increase participation



8

Network
Gain new contacts

Create a workflow to track donor communication preferences.

8

Network
Gain new contacts



Let's play a game: **MAKE 21**

6 **Loop**
Reduce donor churn

Record a video asking new donors about their interests.

9 **Loop**
Reduce donor churn

5 **Pyramid**
Increase participation

Report on lapsed donors for re-engagement ideas.


5 **Pyramid**
Increase participation


Q **Loop**
Reduce donor churn


Offer exclusive content (e.g., early access to resources).


Q **Loop**
Reduce donor churn


Let's play a game: **SOLVE A SCENARIO**


2  **Brainstorm and involve past supporters for your next campaign.** **Network** Gain new contacts

9  **Give a program update for a campaign you're working on.** **Loop** Reduce donor churn

7  **Send out a list of upcoming advocacy opportunities.** **Loop** Reduce donor churn

Q  **Invite select donors to a strategic planning discussion.** **Pyramid** Increase participation

10  **Offer a tour of your facilities or mission work.** **Funnel** Convert new supporters

10 

Thanks!

Any questions?

Reach out to Julia at
jgackebach@donorperfect.com



donorperfect.com/cards