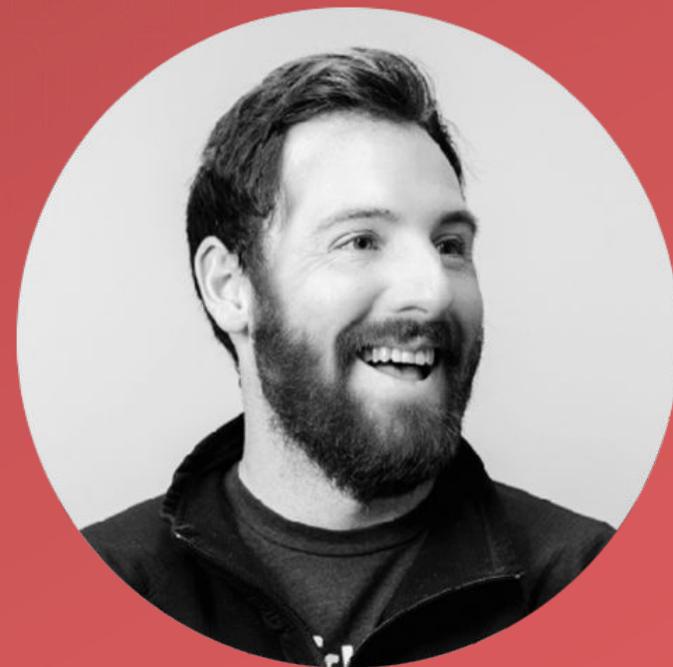


Using Tech to Bridge Giving & Impact

Charlie Lewis
Virtuous



unbound

A little about me...

- Raleigh, NC
- Middle Child
- High-School Ministry via YoungLife
- Thrill Seeker
- Type A
- ESTJ
- Enneagram 8
- Former Fundraising Consultant (TFS)
- 10+ Years in SaaS
- Current Role = Sr. Technology Advisor (Virtuous)

Why are we here?

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The First Principle of Fundraising

Connect supporters with your story through systems



Supporters

Donors, Stakeholders,
Volunteers, Board, Staff

Systems

Campaigns, Processes, Habits,
Metrics, Communications,
Platforms

Story/Impact

Mission, Impact, Purpose,
Outcomes, Beneficiaries



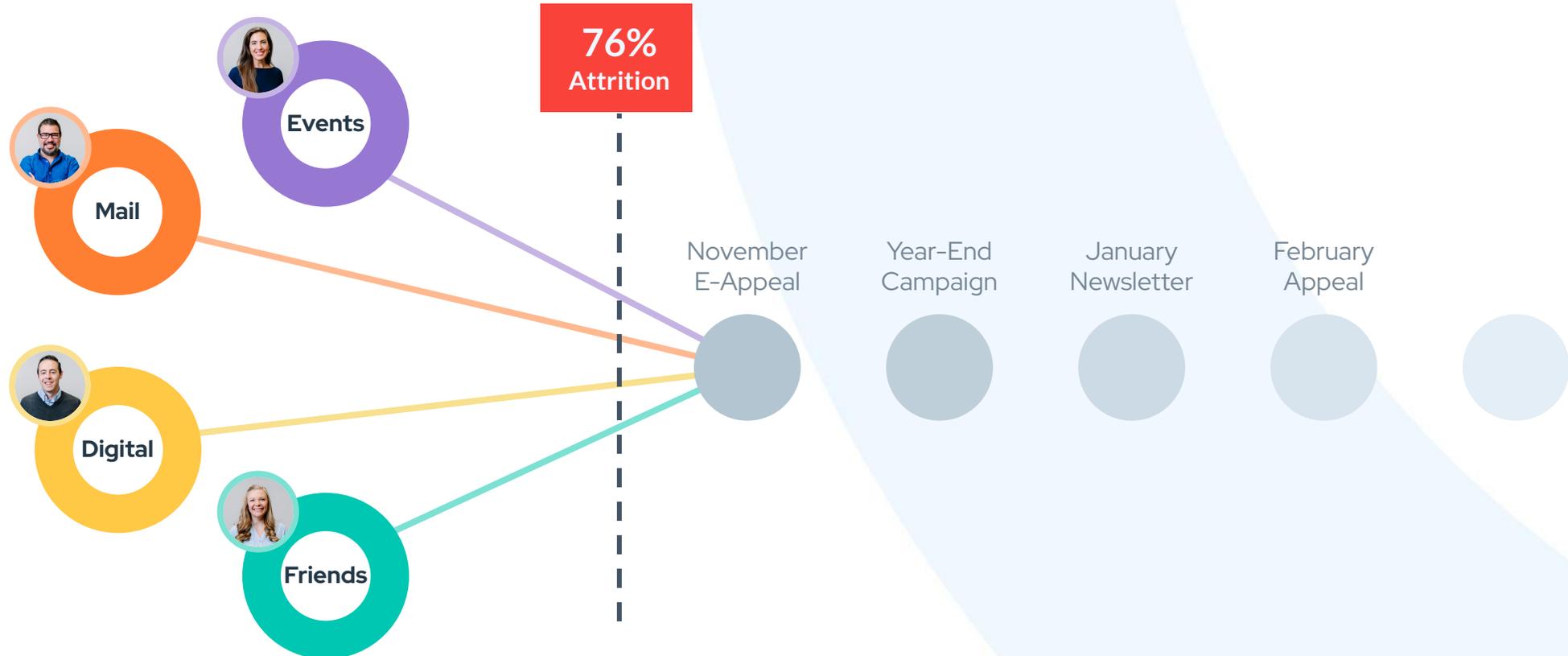
Old School

Donor/Prospect Acquisition

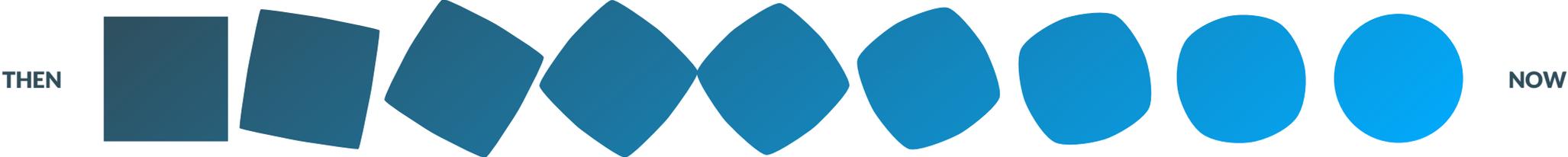
- Personal and varied
- Based on donor's intent

Retention & Cultivation

- One-to-many ("Spray and Pray")
- One-way based on nonprofit timing.
- Disconnected from intent



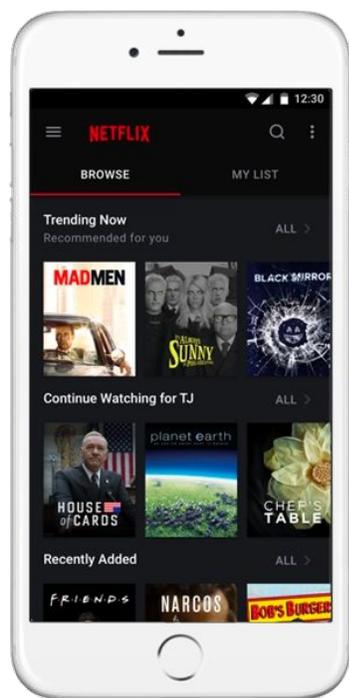
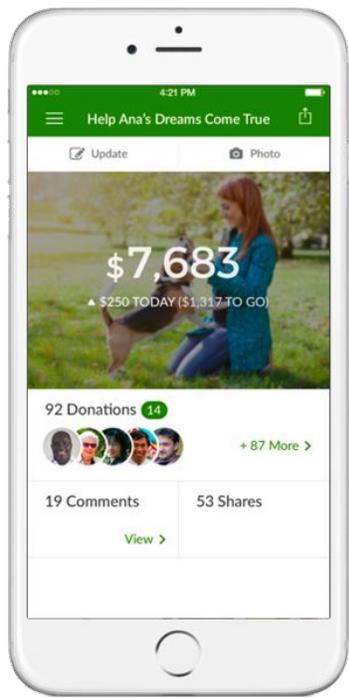
The world you fundraise in has changed.



Giving is personal

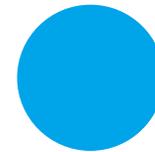
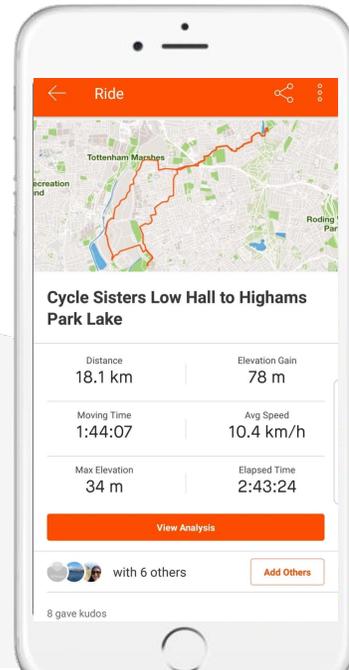
Today's donors expect a personal connection to causes they care about.





What changed?

Shift from mass marketing to personal experiences.



Tailored to you

Curated content and experiences based on your interests.

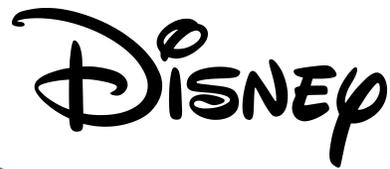


Two-way, behavior driven

Triggered based on my response to content, data signals, etc.



Personalization Everywhere



STITCH FIX



A Growing Generosity Crisis



The numbers

≈50%

Turn over in donors every year

≈25%

Decrease in donors the last decade

Why donors opt out

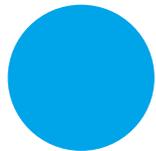
Inappropriate asks & impersonal messages

Lacking acknowledgement & transparency

What changed?



Shift from mass marketing to personal experiences.



Tailored to you

Curated content and experiences based on your interests.



Two-way, behavior driven

Triggered based on my response to content, data signals, etc.

Why donors opt out

Inappropriate asks & impersonal messages

Lacking acknowledgement & transparency

The Insight

Donors continue to give when they feel connected with and confidence in an organization working on a cause they care deeply about.

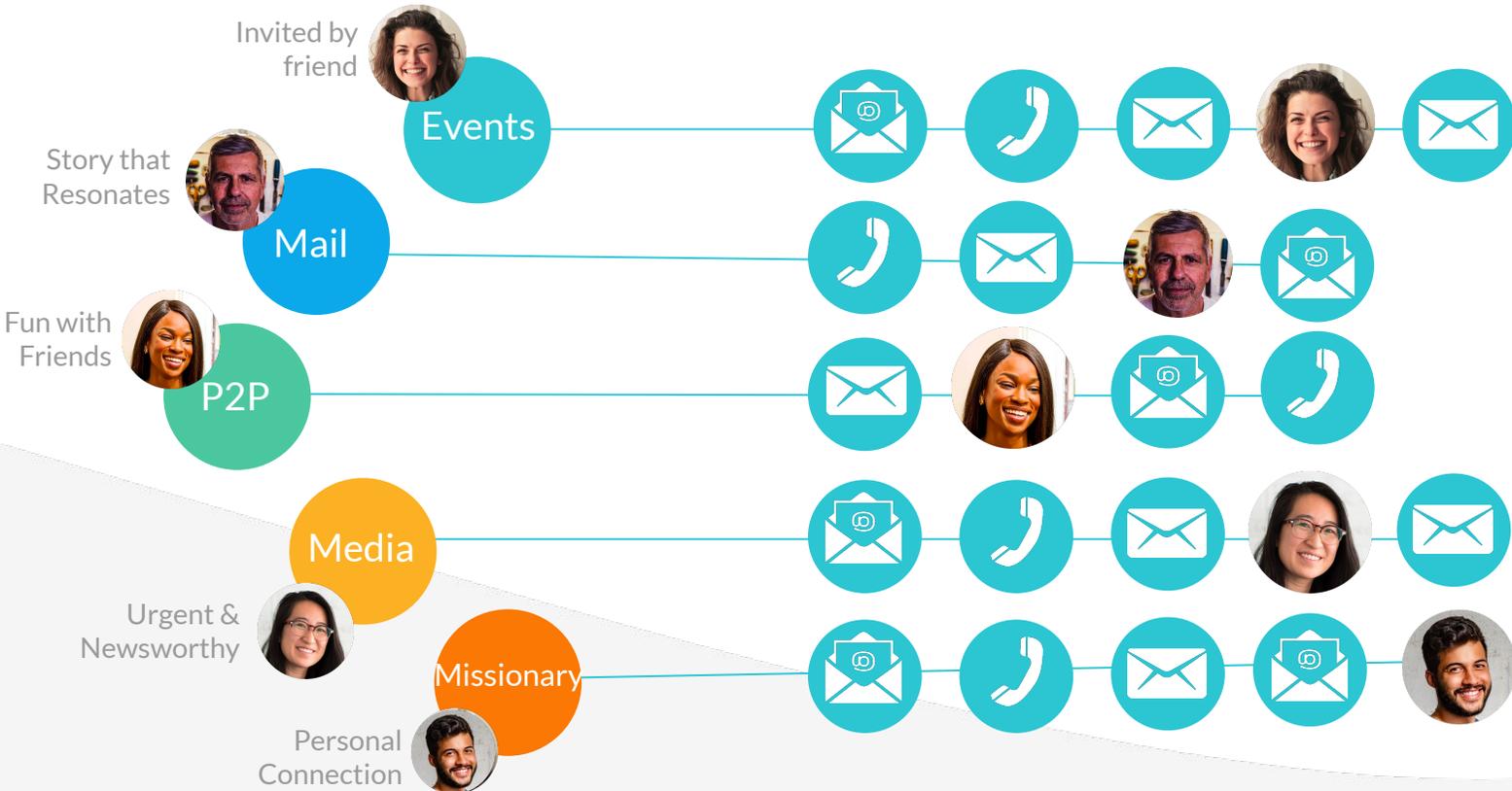
New School

Donor/Prospect Acquisition

Personal. Based on Donor Timing

Retention & Cultivation

Connected to Intent. Driven by Donor Behavior.




Retention

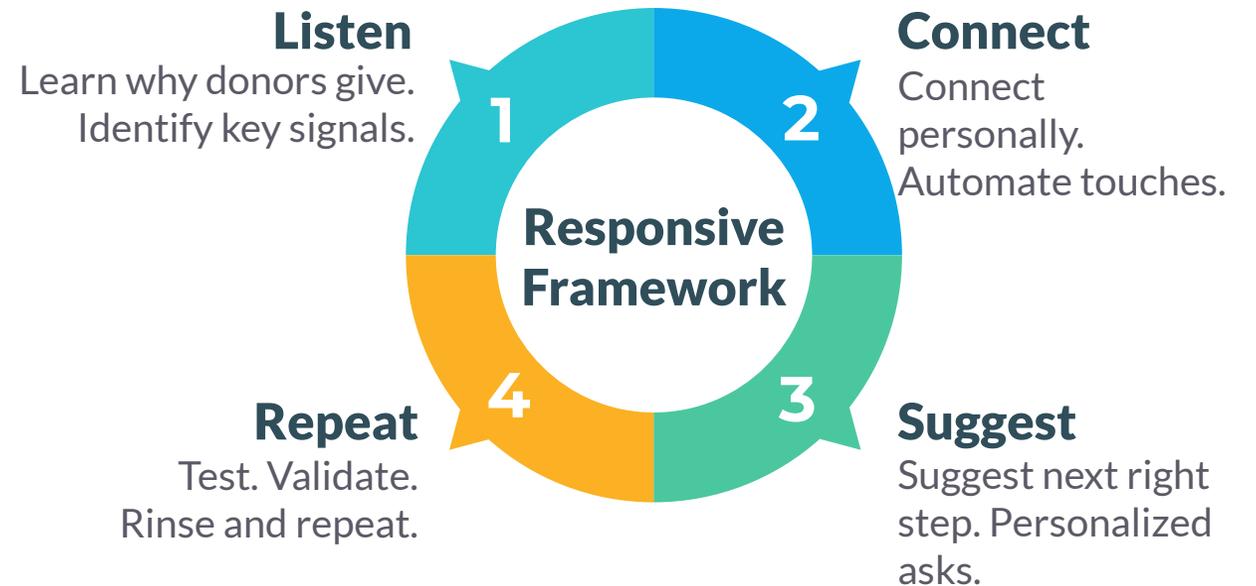

Avg Gift


Engagement

A Better Approach : Responsive Fundraising

Growing nonprofits are using responsive technology and tactics to connect personally with each donor.

The Donor-Centric Model



Listen

Identify key signals and learn why donors give



A better approach
responsive fundraising

Growing nonprofits are using responsive technology and tactics to connect personally with each donor.



Listen

Identify key signals and learn why donors give



Connect

Connect personally and automate touches as needed



A better approach
responsive fundraising

Growing nonprofits are using responsive technology and tactics to connect personally with each donor.



Listen

Identify key signals and learn why donors give



Connect

Connect personally and automate touches as needed



Suggest

Suggest next right step with personalized asks.



A better approach *responsive* fundraising

Growing nonprofits are using responsive technology and tactics to connect personally with each donor.



Listen

Identify key signals and learn why donors give



Connect

Connect personally and automate touches as needed



Suggest

Suggest next right step with personalized asks.



Repeat

Test and validate to become even more responsive.



A better approach *responsive* fundraising

Growing nonprofits are using responsive technology and tactics to connect personally with each donor.



What if ...



Tim



First gift to campus missionary

New Donor Journey



Ronda



Abandons donation page

Online Gift Recovery



Lynn



Hasn't given in 13 months

Lapsed Donor Journey



James



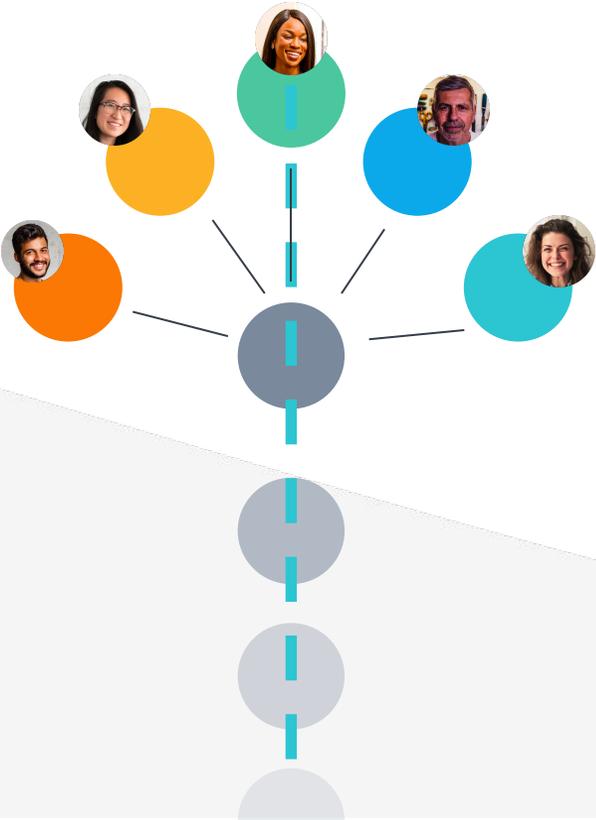
Clicks an email to download info on Ministry Impact

Ministry Impact Series

You have a choice!

Traditional

Disjointed, Static, Siloed



OR

Responsive

Dynamic, Personal, Multi-Channel



Quick Pause

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StoryBrand Framework





A CHARACTER

What do they want?



MEETS A GUIDE WHO UNDERSTANDS THEIR FEAR

Empathy

Authority



THAT CALLS THEM TO ACTION

Direct

Transitional



SUCCESS

Successful Results

- _____
- _____
- _____
- _____
- _____
- _____
- _____



FAILURE

Tragic Results

- _____
- _____
- _____



IDENTIFY TRANSFORMATION

From

To



AND GIVES THEM A PLAN

Summarize your plan

THAT RESULTS IN...

External

Internal

Philosophical



WITH A PROBLEM

STORY

BRAND

StoryBrand.com

One **important** gap ...

One important gap

What's **holding nonprofits back from
being responsive?**

The Problem

Most nonprofits & support staff are handcuffed to traditional fundraising systems that are largely impersonal.

THE RESPONSIVE SYSTEM



Donor Growth Model

Acquisition, Retention, Cultivation



Responsive Fundraising

Listen, Connect, Suggest

Responsive Teams

Visibility, Collaboration, Integration

Responsive Platforms

Responsive CRM, Automation, Smart Giving, Email/Mail/Text, AI, Analytics



So what now?

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Two Priorities

- 1. Explore Tooling**
- 2. Seek Training**

Buy

Build

Point Solutions

Holistic Solution



Performance

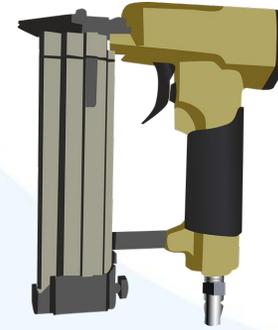
20 Nails per Minute

Technique

2 Hands

Cost

\$19



Performance

90 Nails per Minute

Technique

1 Hand

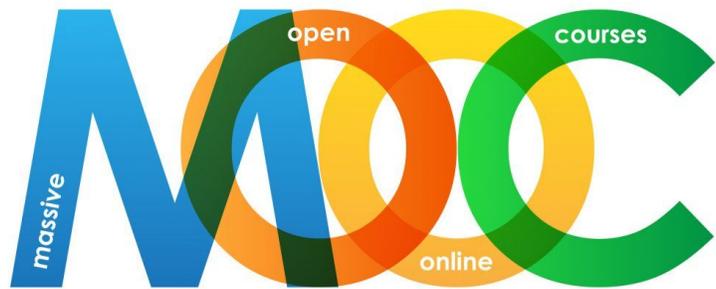
Cost

\$249

Where to search?



Where to learn?



Thanks for your time!

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We Want Your Feedback!

1. Open SRLC app
2. Click on the “survey” button on the home screen
3. Choose “workshop” from the list of surveys
4. Select **this** workshop in the drop-down menu