

How to communicate at optimum, from the start

Project 05. The supporter's journey

Morag Fleming, April 2017

The brief

Though each donor's experience will be different, mapping the optimum path over time can be useful for both the donor and the fundraiser, with potential if planned wisely to greatly enhance the donor experience. This project will define the process and seek to be helpful to fundraisers wishing to offer their donors a truly satisfying, rewarding long-term experience.

Summary guidance

The supporter journey: A definition

While there's no universally agreed definition, a supporter journey can be described as the experience that a charity delivers to donors from the first moment of their support. The journey should also give donors the opportunity to increase their engagement, commitment and impact at specific points that are appropriate to them depending on their preferences and behaviour.

Practically, this is delivered by fundraisers using a roadmap of communications that should map the most appropriate touchpoints to communicate optimally with each supporter.

A good supporter journey will put the donor at the centre, and will include many pathways, recognising the donor's choice of channel, product, motivation and circumstances, and will allow a flexible, easy transfer to another pathway when the donor chooses to give in a different way, or to provide an easy exit when he or she no longer wishes to offer support.

A supporter journey should not be based solely on the entry point into the organisation, or solely on demographic information; instead, it should always aim to be relevant to the donors' motivations where possible.

The supporter journey is an opportunity for the charity to share stories, appreciation, and opportunities to become more or less involved. When done well, it can cement a lifetime of support and will yield financial rewards; however, if done badly, it can damage relationships before they are even established and result in low commitment and loyalty, which will impact on future levels of giving.

Stages of the Journey

The initial phases of a journey should aim to reaffirm that the decision to give is a good one, and to reassure and start to build trust; but, from the outset, the journey should engage donors in the way that is relevant to their:

- Reasons and motivations for giving
- Current life stage, identity and circumstances
- Preferences for channel, product and contact.

There are several stages that a journey can take, which can be roughly identified as:

- Thank you
- Welcome (0-3 months)
- Nursery (3-6 months)
- Retention (6-12 months)
- On-going

In addition, there should be journeys for specific ways of giving at a high level, for example Mid-Level, Major Donor and Legacy Donor, as well as community groups, event fundraisers and other areas of support. A donor should be able to cross over into a different journey based on his or her behaviour, life stage and commitment. The supporter journey should be a cross-team responsibility with consistent quality levels.

Priority, importance and investment

Interestingly, throughout the work on this project, we have found a distinct lack of case studies to present as examples. The assumption could be:

- Many charities seem to be in a state of redefining/reworking their journeys and few charities seem to be confident and happy with their journeys.
- Journeys are low priority in the same way that retention and long-term thinking are low priorities in comparison to acquisition and short-term income.
- Investment in resources is low due to difficulty in proving ROI.

There is a clear message for fundraising managers regarding investment, namely that is that the journey – particularly in the first 12 months – is as crucial to get right as is any acquisition, and should be a critical investment point. Whilst it is difficult to attribute ROI to a supporter journey, it is accepted in the sector that happier donors stay longer and give more. A good journey will enhance the experience of a donor and result in more loyal and generous supporters.

In terms of recommendations, the output of this report is intended to give fundraisers a strong place to start in terms of what needs to be considered rather than a framework to copy; at all stages, the journey should be as individual, specific and appropriate as possible. It should be as unique as the charity delivering it.

The Supporter journey project has been investigating supporter journeys within the sector and ways in which some charities are developing and delivering them.

The project's aim was to:

1. Investigate current thinking

2. Look at supporter journeys from a donor perspective through a mystery shopping exercise
3. Review some supporter journeys currently being delivered
4. To show how supporter journeys can be a great way to deliver a great supporter experience.

Based on the above, we then identified the principles that need to be taken into consideration when developing a supporter journey:

1. Supporter journeys always have to be relevant to the donor who is on the journey. There's a danger that organisational convenience will dictate the stages of a supporter journey, when what always has to be paramount is, what is best for the donor? One of the most important things to know to make a journey relevant is the reason for giving, which will not necessarily be the same for all donors.
2. It's about how we make donors feel, not what we want them to have. As the team at Ontario Nature show (see the full report), instead of the starting point being 'let's ask them to tell us something', the starting point is 'how do we want donors to feel, and then work out what materials or touchpoints might achieve that'. Suddenly, 'let's send a survey because we think we should' becomes 'we want our donors to feel we are interested in their opinion. How do we do that? Let's send them a survey'.
3. Always be authentic and genuine. The primary purpose of your supporter journey is to delight your donors, not to raise short-term money. Delighted donors will stay longer and give more in the long term. Any supporter journey that has a ROI attached to it is not in the best interests of the donor because the objective becomes about income instead of the donor experience.
4. Invest in the supporter journey to ensure that donors have an excellent experience, not only in the early months/ first year when it is particularly important, but also throughout their time as a supporter. The cost of initiatives such as those described here will be more than recovered via higher retention rates of happier donors. This requires a long-term view and corners should not be cut, as this could compromise quality or affect income generation. The supporter journey collateral should be seen as valuable as income generating/appeal collateral, and should be afforded an adequate budget and resourcing as an investment into retention and future income.
5. Engage with the rest of your organisation to get access to amazing stories to tell your donors. Programmes and service delivery teams are your gateway to gathering emotional and engaging stories that are crucial for your supporter journey. Have a plan to inspire and engage the rest of the organisation in what you are doing and why. When programme staff are aware that they share values and passions with donors who wish to achieve the same vision, stories can emerge that can connect donors more closely to beneficiaries (see the Ontario Nature case study). A good donor journey will be one that brings the donor and beneficiary closer together for a better experience (see the VSO case study); often, this will only be made possible through engaging with staff outside the fundraising team.
6. Identify which donors or group of donors you are going to include in your supporter journey. The journey needs to be relevant to each group of donors. Therefore, begin with your next recruitment campaign and work out from there. Think beyond the acquisition method and start to look at different groups of donors based on other

metrics that are more meaningful. Test segmenting donors according to what they value, what they are interested in and how they want to interact with you. Don't be afraid of 'allowing' donors to ask for a lighter touch, as this can be equally important when developing relationships.

7. Make sure that you have the tools and processes to manage the donor communication preferences. Record 'opt in' and 'opt out' carefully and, within Data Protection laws, have multiple channels in your supporter journey so that you can still contact donors if they opt out of one channel. Always give channel choice where possible and then act on that. Be realistic, but be consistent according to your capabilities and resources. Remember to always keep your supporters in control of what they are receiving.
8. Tell your donors a story that continues across the journey. Make your initial early stage supporter journey communications relevant to the message used to recruit donors and build on the story as you progress. Until you know your donors and their preferences a little better, don't confuse them with everything you do; equally, don't assume that a donor will not want to have a broader knowledge of your work. Determining donor motivation is essential to tailor the on-going story.
9. Don't always ask for something. Include plenty of thank-you messages, updates and non-ask actions to keep your donors interested. Remember that a donor may not differentiate between a thank-you mailing and a direct ask, so make it very clear from the outset that the communication is not asking for money. Non-ask pieces should avoid even soft asks (for example, a newsletter with a donation form is NOT a non-ask piece).
10. Ask your donors for feedback about how they feel about your supporter journey. Find a way to get feedback from your donors (telephone, email address, questionnaires) and be sure to act on what they tell you.
11. While it may not always be possible to show the benefits of good supporter journeys in direct return on investment improvements, there is growing evidence that net income will be increased over time. See the main project.

Some additional reading materials can be found here:

1. Relationship Fundraising: A donor-based approach to the business of raising money by Ken Burnett
2. How are you managing the donor journey? by Tony Elischer – 101 Fundraising
<http://101fundraising.org/2013/08/how-are-you-managing-the-donor-journey/>
3. The Donor Journey Pocket Guide by Rogare
4. How to love your donors (to death) by Stephen Pidgeon
5. Relationship Fundraising, where do we go from here? Volumes 1 to 4 by Adrian Sargeant, Rogare
6. The Supporter Journey – myth or reality? Think Consulting Solutions
<http://www.thinkcs.org/supporter-journey-myth-or-reality/>
7. The User's Journey by Donna Lichaw

The approach

Supporter journeys have been discussed within the charity sector for many years ever since Ken Burnett first published his Relationship Fundraising¹ book in 1992 and encouraged us to think about building relationships with our donors.

In 2013, Tony Elische² likened fundraisers to travel agents, designing donor journeys that would guide donors through their relationship with the charity:

“We need to try to reach out to and assume the role of travel agents thinking tactically and strategically to help build the most appropriate, inspiring and tailored journey that we can to meet people needs and to enrich their lives. Journeys are not about us they are about them, our supporters and donors.”

Bearing all of the above in mind, this project’s aims were:

1. To investigate some of the current thinking regarding the delivery of supporter journeys
2. To see what a supporter journey looks like from a donor’s perspective
3. To review some of the supporter journeys currently being delivered by charities to enable us to develop some practical advice for charities wishing to develop their own journeys
4. To show how supporter journeys are a great way to deliver a great supporter experience.

Current thinking

There have been many articles, blogs, models and theories concerning supporter journeys, some in support thereof and some against. In fact, the very definition of a supporter journey is difficult to pin down across many of these pieces. However, the majority are in agreement that, whatever it is, the supporter journey entails being donor centric in your communications, meeting the donors’ needs and responding in the way in which they want to be contacted. If donors are communicated with in this way, they should remain more loyal to the charity, with the result that retention will be increased and more income will be available for the cause.

Therefore, the definition of a supporter journey should be “an experience that the charity delivers to the donor from the first moment of their support”. It should be tailored to the donors’ motivations, life stages and communication preferences, and should give donors the opportunity to increase their engagement, commitment and impact at specific points that are appropriate to them.

A good supporter journey will put the donor at the centre, and will include many pathways, recognising the donor’s choice of channel, product, motivation and circumstances, and will allow a flexible, easy transfer to another pathway when the donor chooses to give in a different way, or to provide an easy exit when he or she no longer wishes to provide support.

We live in a world in which the commercial sector has encouraged us to expect an almost instant response to an action taken and clever follow up to suggest our next steps. We only have to order a book from a certain on-line retailer to receive instant recommendations for our next purchase almost immediately in our inbox. Charities are competing against this backdrop and we need to be as smart as the commercial sector in identifying our ‘customer’s’ motivations and the next steps desired.

While a supporter journey can provide a map to help us to determine how we might communicate with each group of supporters, it has to be a map with many pathways that recognises the donors’ choice of channel, product and either transference to another pathway

when they choose to give in a different way, or an exit strategy when they no longer want to support the charity.

Emotional storytelling has become part of the way in which we write our initial donor recruitment messages, but the subsequent messages that a donor receives often move away from this technique and can sometimes appear to be random, disjointed information that may make sense to us as experts in our charity, but can result in confusing the supporter.

We have to become better at telling the donors a story over the course of the supporter journey, and not just throwing random bits of information at them.

The supporter journey should be a story in itself, which takes the donor from the recruitment message through how they have helped, on to another story about the same theme to help them to become familiar with the organisation and to build up, through storytelling, to the next point at which they will be asked for support. This story has to continue throughout the lifetime of the supporters' relationships with the charity and take them from their initial donation to a potential legacy.

A comment from Stephen Pidgeon³ is a good example of what we are aiming to do in creating a supporter journey - "It is the fundraiser's job, your only job, to make the supporter feel good about supporting your charity. You have to love your donors. The money will follow."

Along the way, we also need to include some 'WOW' moments for donors by delivering something that they didn't expect to get. These 'WOW' moments are really impactful for donors, as they stimulate a release of dopamine in the brain, which is the pleasure-reward hormone. They must be unexpected, unpredictable and be completely tailored to the charity and donor who is receiving them.

Recent research by Rogare⁴ on relationship fundraising describes the donor journey stages as awareness, exploration, expansion and commitment. Donors are moved from an initial first impression of the charity to becoming one with the mission and more connected to the beneficiaries with each donation.

There will, however, always be donors who don't want to have a relationship with a charity, and their donation is a transaction that they make because of a particular message that hit home with them. The supporter journey also has to recognise these donors, and include a way for their rejection of further requests to be acknowledged and acted upon.

Mystery shopping research

One of the project groups conducted some mystery shopping research in which they made either a cash donation or signed up to a direct debit with nine different well-known charities to see what they might deliver in terms of a supporter journey over a five-month period.

Unfortunately, we were unable to continue to monitor the journey beyond that period because of the project's timescale.

Cash donations were made either in response to an insert, in response to a direct mail appeal, on-line or via text, and the number of responses received varied from one to 10. There was also considerable variety in the number of cash asks that were made over the five-month period, with five charities not asking again and two asking twice.



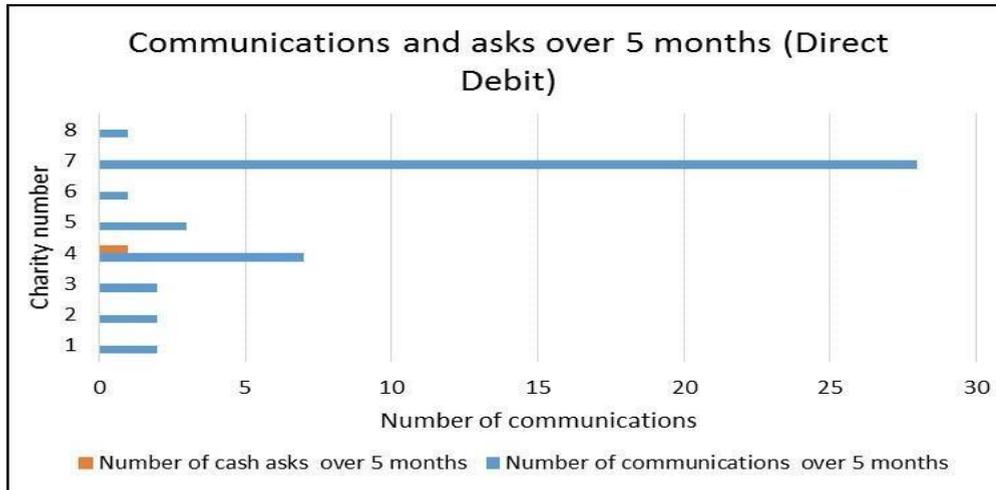
What was more interesting was the type and feel of the communications that were received after the donation:

- The donation made in response to an insert received an email reply from the charity asking the donor to sign up to the newsletter. This was followed by a thank-you letter that did not refer to the case study in the insert and gave no indication of how the donation would help. This charity then communicated a further eight times over the period with invitations to become involved, in addition to two cash asks.
- The direct mail donation received a thank-you letter in response, welcome pack sent over a month after the donation had been made, and no further communication.
- Four gifts were made on-line, all of which received an automatic email in response. However, one of the emails finished in mid-sentence and had an instruction to log on to update preferences, but the link was inactive. This charity then sent a further email each month, with two of these asking for financial support. The others either didn't send anything further or sent newsletters.
- The three text donations received immediate bounce back texts, but one did not follow up further after that, one tried to convert to DD via a text message and the third came back with a further donation request two weeks later.

There was a general feeling among the donors that the communications weren't specific to the reason or the way that they had donated. They were lacking in emotion and, with just two exceptions, failed to refer to the story that had prompted the donation. They didn't feel that there were many cases in which they would be inclined to donate to the charity again.

The group members also signed up to donate via direct debit to eight well-known charities. Three were in response to inserts, two to a door drop and the rest on-line.

Again, the results varied in the number of communications that were received, with the majority of charities communicating very little, although one sent 28 emails over the five-month period.



Direct debits were signed both off- and on-line, and communications from all charities were received via a combination of post and email. There seemed to be more of a link with the initial recruitment message in these communications than there was with the cash donations, and only one charity’s communications felt unemotional and generic. There were two stand-out charities within this batch that made the donor feel really welcomed, valued and happy to continue to support.

Supporter journeys currently being delivered

We posted a question through the CDE Enthusiasts group asking for charities that were currently delivering supporter journeys to engage with us and answer some questions about their use of such journeys. In all, we had nine responders, three of which wished to remain anonymous.

All of the charities were in various stages of developing their supporter journeys, with some having really thought about why they were creating them and what supporters would get out of them, while others were just at the beginning of implementing something.

One thing that came across clearly from everyone when asked why they implemented supporter journeys was that this was primarily for the benefit of the donor and that, by treating the donor well, this would benefit the charity.

“It is essential to our programme and sustainability of our fundraising to ensure supporters have a great experience when interacting with us. We need to design a programme which is relevant and impactful for them, and journeys help us to achieve this” (Anon).

“To make donors feel more engaged and involved with us, the work we do and the difference we make. We try to make the journey as close and personable as possible, so donors can feel they are really making a difference and contributing to something amazing. Engaged, happy donors who are confident in the impact of the charity and their donations will give for longer and enable us to commit to long-term projects” (VSO).

We were, however, disappointed with the level of response we received and the difficulty we had in sourcing case studies to present. This may be because charities are in the process of defining and testing supporter journeys and don’t feel ready to share their findings and results. Unfortunately, it may also be that long-term donor interaction is not a priority within the sector because ROI and short-term targets are still seen as being more important.

We are grateful to those organisations that were willing to share their supporter journeys and their findings.

In the survey, we asked the charity's respondent to answer questions about how their journey was being created and delivered, and what the donors thought about it.

Case studies of some of the charities can also be found at the end of the report.

Survey responses

a) How satisfied are your donors with your communications?

If one of the main reasons that charities have for putting a supporter journey into practice is to make donors feel more engaged and happy, then there must be some way within the journey to measure this and determine that it is successful.

We asked charities to tell us how their donors felt about the communications that they were sending them, and six of the nine charities responded to discuss donor surveys, satisfaction levels and a supporter email address where they gathered responses.

"81 per cent say that the number of communications are 'just right' with a further 17 per cent saying that they would like to hear from us more" (Prostate Cancer UK).

"They love it! We've had so many lovely comments, and one donor even named their grandchild after one of the VSO volunteers!" (VSO).

"85% of supporters agree that 'I feel informed about the work', 77% believe our communications are relevant to them, 16% are neutral, 90% feel the amount is right for them and 6% want more" (Anon).

All of the charities cited a very low level of complaints in relation to their supporter journey, with one charity saying that it assumed that anyone who didn't like the communications being sent would just unsubscribe.

When asked to describe what was working well in the supporter journey, four of the charities said that supporters enjoyed the engagement that they now had with the charity, which was more donor centric than it had been previously.

"Wide range of engagements and being supporter centric rather than Greenpeace centric. We really try to understand what motivates our supporters to act" (Greenpeace).

"Supporters seem to enjoy receiving personalised communications, which we are able to do now" (Anon).

"I think the donors love the personable element of the journey. VSO as a charity takes a back seat and allows the volunteer to speak directly to the donor. It sounds honest, interesting and right from the source" (VSO).

When asked what wasn't working, the main points discussed were the difficulties of implementing the journey and measuring the impact thereof. One charity mentioned needing to have more stories to tell and the difficulty of obtaining them from the field.

b) How else do you measure the impact of your supporter journey?

Apart from the donor satisfaction measures detailed above, most charities also measured the impact in terms of retention rates, income, second actions, ROI and growth of regular giving.

Only four of the nine charities had carried out split tests on their supporter journey, with the others saying that they intend to in the future.

One charity that had conducted a split test stated that it was done to prove a point and that, even if the results had been the same, they would have carried on with the supporter journey as it was the right thing to do for its donors.

c) Who are the targets of your supporter journey?

Some charities had multiple supporter journeys based on acquisition channels, while others were slowly building up to that point one channel at a time.

Regular givers seem to be the group of donors that is most often on a supporter journey, and this is when most charities start to develop their plans. These donors are some of the most valuable donors for a charity to retain, and journeys need that will engage them in the long term to be developed. These donors should be contacted based on the length of time that they have been donating to the cause, or based on the number of donations made rather than on a seasonal basis, which might be more convenient.

Other donors are more likely to be communicated with based on their first interaction with the charity. This may take motivation into account, but seems more often to be based on what they do rather than on why they do it.

“The welcome channels differ by recruitment channel (up to 12 months). The majority of Practical Action’s committed giving recruitment is through direct dialogue. These donors receive more than donors recruited online or through inserts for example” (Practical Action).

“We have a number of journeys based on their entry to us, so eventer, major donor, legacy pledger, corporate, in-mem etc.” (Rethink).

Charities don’t seem to vary the donor journey based on donor demographics (age, location, and so on), although one did state that the older donors often do not have an email address and thus receive most of the communications via post.

d) How do you take donor preferences into account?

All of the charities reported that they took the consent given by the donor to contact them via the various channels into account, and gave the donors the opportunity to opt out during the course of the journey.

“All donors and fundraisers are asked if they would like further communication from us and this is monitored through our CRM system. A supporter can opt out at any time by emailing, phoning or writing to us and all our marketing emails have the option to unsubscribe”(Anon).

Most of the charities used mail, email, telephone and SMS as part of their journey if they had permission from the donors to do so, with one charity citing that, if the donor gave permission, the donor would expect to hear from the charity by that method.

“Our supporter journey includes postcards, emails, SMS messages, newsletters and telephone calls. If a supporter opts out of one channel we make sure that we replace that communication with another channel that they are opted in to” (Anon).

Half of the charities stated that they had sent out a supporter survey to gather information about donor preferences, which was then used to amend the journey.

e) How long does your journey last and do donors switch to other journeys?

Some of the charities that responded had welcome journeys that lasted from four months to a year before the donor was transferred to either another journey managed by a different team or entered the standard warm programme.

Others felt that the donor’s journey did not end even if they stopped supporting or opted out of the communications.

“A journey last for a lifetime, or for as long as a supporter would like it to last” (Anon).

“There is no set time limit of when we will “end” our relationship with them, unless of course they ask us to do so” (Anon).

“We will stay in touch with the supporter long after their support to us has ended, through updates on our work. There is no set time limit of when we will “end” our relationship with them, unless of course they ask us to do so” (Anon).

Some of the supporter journeys were also adaptable in terms of responding to donors’ behaviour, and charities were able to accommodate this by switching to a different journey if the donor became a supporter in a different way.

f) How many communications do you send in the first year?

There was quite a variety in the number of communications sent during the first year in which the donor was included in the journey. What and how much is sent depends on a variety of factors – acquisition channel, communication preferences and the type of donor (eventer, cash or regular giver).

The least number of communications being sent was between two and four, and the greatest was an email every week with a huge variety in between. There were different types and sizes of charities taking part in the survey and, of course, the practicalities of delivering messages will impact in some way on the type and number sent.

Charities that have the ability to automate the supporter journey through their database or linked software will have a much easier route for delivering their journeys than those who do not.

“If they are on the postal route, then five in their first year, three on subsequent years. On the email route, eight in their first year, then six over subsequent. They will also receive a copy of our supporter magazine Lifechanges twice a year and might get an upgrade phone call once a year” (VSO).

“It completely depends on the donor. If they only interact with us on one way, such as by giving a single cash gift, they will get a small amount of comms (two to four including mandatory comms) – but this too might depend on what they have given to. If they interact with us in several ways – i.e. volunteer, RG, marathon runner, campaigner, they will get more comms to ensure they have a great experience, and receive all the information they need” (Anon).

“It depends on what permissions they (regular givers) have given us to communicate with them. If we have full email, mail and telephone permission they will receive three emails, a newsletter, a thank-you call, an upgrade call and a thank-you card” (Anon).

“During the welcome journey they receive seven emails and then they’ll get approximately one per week thereafter” (Greenpeace).

The communications that were sent were also a combination of asks (financial and non-financial) and thank-you communications, with one charity citing a thank-you phone call as part of the journey.

The journeys described by the charities were all very different in terms of the variety and number of communications that donors were sent. Some of the charities, such as VSO and Greenpeace, asked their supporters for feedback to determine whether the number of communications was right for them and adjusted their journey accordingly. Others based the number on what felt right to them. The number of communications sent and the way in which they are delivered has to strike a balance between what is motivational and acceptable by the

donor and what is practical to deliver by the charity. However, it is only by beginning to develop a journey that this can be determined.

g) Do you continue the recruitment story throughout the supporter journey?

Donors begin to support a charity because of a particular story that resonates with them when they hear it. All too often, the communications that next come from the charity don't reference that story or provide an update on the problem that they were asked to help to solve.

Six of the nine charities felt that they continued the story for the donor, with the others saying that they were aiming to do so in the future. There were some really good examples of how the story was followed up:

“The first communication is usually the volunteer's feeling and preparations before they leave home. The next is their first impressions upon arrival. Subsequent emails/postals tell the story of the volunteer's placement: challenges, successes, food eaten, friends made, things missed!” (VSO).

“We continue the story of the child that was talked about in the face-to-face recruitment by sending emails with videos of their progress, postcards and a thank-you card from the parents. We also send a newsletter so that they get an introduction to our other work too” (Anon).

The surveys provided some really good examples of how charities are trying to communicate in a more donor-centric way. They also indicated some of the challenges of managing supporter journeys in terms of having the emotional stories to include in communications, liaison among different departments in the organisation and extending the journey beyond the initial stages to longer term supporters.

However, all of the charities that took part were convinced that the supporter journey that had been initiated was a much better way of engaging with donors, delivering a good experience to them and helping to generate long-term support.

Putting the principles and actions into practice

The issues that have affected the fundraising sector over the past year and the new legislative requirements that will be coming into force regarding data protection mean that charities have to focus more carefully on the way in which they interact with their donors.

The charities that have shared information with us regarding their supporter journeys are already working hard to ensure that donors are satisfied with their communications. From their responses to our survey, we have been able to pull out some principles that are either common to all of them or to which they aspire in the future.

1. Supporter journeys have to be relevant to the donor who is receiving them
A supporter journey is not about what is convenient for the organisation's dissemination strategy, but has to be based on the donor's reason for deciding to engage with your organisation. Communication must be relevant for each donor and will thus require more thought regarding the development of communication to take this into account. When possible, the donors should be asked why they have made their donation to you; this question can easily be incorporated into most recruitment channels. This information should be used to determine on-going communications to ensure that they are relevant to the donors' needs.

“It is essential to our programme and sustainability of our fundraising to ensure supporters have a great experience when interacting with us. We need to design a programme which is relevant and impactful for them, and journeys help us to achieve this” (Anon).

Getting started: Make sure that you have incorporated a question into your recruitment communications about the donor’s motivation for giving. If you are communicating with donors who are already giving to you, ask them the next time you are in contact.

2. Supporter journeys are about how we make donors feel

The supporter journey is not about the organisation delivering their communications to the donor; instead, it is about ensuring that the donor feels valued and delighted to be supporting the cause.

The Ontario Nature case study in the following section is a great example of how a charity has started to develop its supporter journey by asking themselves ‘how do we want donors to feel about us?’ rather than ‘what will we send them?’ This starting point puts the donor right at the forefront of the communications and avoids the organisation taking centre stage and boasting about its achievements. Communications then become about ‘you’ and the impact that the donor is making instead of ‘we’ and what the charity is doing.

“When the starting point is ‘how do we make them feel’ over ‘we send them this brochure at month 5’ a donor journey takes on a very different approach” (Ontario Nature).

Getting started: Look at all of your communications to ensure that the donor and their support is at the centre of them and not the organisation talking about what it is doing.

3. Supporter journeys need to be authentic and genuine

The supporter journey has to be about delighting the donor and engaging them to stay with you over the long term. It is not about introducing additional requests for support or for short-term gain. Donors need to feel that they have control over the number and type of communications that they receive, and that there is a benefit for them in continuing to be in touch with you. This, in turn, will generate additional long-term support, but the journey can’t be compromised by being focused on return on investment.

“We decided to develop a supporter journey because it was the right thing to do for our donors – if it brings in extra money that is a bonus” (Anon).

Getting started: Make a case for your supporter journey to be run without the need for a financial target.

4. Investment in the supporter journey has to be made

The supporter journey requires investment to succeed. It is as important as your acquisition budget, and needs to be taken as seriously within the organisation. In many organisations, large amounts of money are spent on recruiting donors and very little is then set aside to ensure that they remain engaged in the future. The supporter journey needs investments in terms of money and resources to ensure that it is delivered properly, in a timely fashion and via the channels that donors want. It is no longer acceptable to send everything by email because it is

cheaper if the result is missing out on a segment of donors that has not given permission to be contacted via email or donors who would be delighted to receive a phone call or postcard.

The cost of investing in a supporter journey will be rewarded by happier donors who will continue to donate over the long term.

“Our supporter journey includes postcards, emails, SMS messages, newsletters and telephone calls. If a supporter opts out of one channel we make sure that we replace that communication with another channel” (Anon).

Getting started: Make sure that you have secured the budget to deliver the supporter journey that you know will delight your donors.

5. Engage with the rest of your organisation so that you have its support and stories to tell

Bringing donors closer to your cause through a supporter journey requires you to have internal buy-in from the rest of your organisation. One of the things that the charities that answered our questionnaire said was that they needed to have more contact with those delivering the services, volunteers and beneficiaries in order to be able to tell the emotional stories that donors need to hear.

Our case study of Ontario Nature makes that point and shows that, by starting internally and ensuring that the people who had the most knowledge and passion about the cause were involved, they were able to engage with donors in a completely different way than previously.

“It’s a great message to share with staff and volunteers that sharing our passion and stories makes our members and donors have a great experience and together, we advance the whole mission. Everyone started sharing stories and information that could be sent to donors that demonstrated need, impact and started to develop a ‘bridge’ between the programmes staff and donors. It developed real enthusiasm for seeing donors as partners, as people who shared values rather than people who simply donate funds” (Ontario Nature).

Getting started: It is not always an easy task to get the rest of the organisation engaged in fundraising but, by beginning with those who are receptive to the idea and building up a support group throughout the organisation, it can be done over a period of time.

6. Decide who will be included in your supporter journey

Supporter journeys have to be relevant to the donors receiving them; therefore, you need to work out who to include in each journey. A campaign to recruit face-to-face regular donors will need very different communication system from communication with someone who has signed up to run a marathon. You need to plan for that.

Ideally, you will plan your supporter journey at the same time as you plan your recruitment campaign, so that you have everything ready to send when your donors interact with you. You should also plan what channels you will use to send the communications, bearing in mind the permissions you have from your donors.

It is better to have one supporter journey running successfully than to have several with which you struggle to cope; therefore, consider what capacity you have to manage this before you start.

It’s also never too late to start a supporter journey for current supporters. It’s as relevant to have a plan for on-going supporters as it is for newly acquired donors. Think about donors who

don't come in from recruitment campaigns – what does someone who signs up to a direct debit on-line receive? Donors who are not part of a campaign with targets are often overlooked by journeys attached to specific campaigns.

“The practicalities of running the programme can be tricky. We have to find suitable volunteers who are willing to regularly send us content and photos. We like to have a selection working in different continents and in different sectors (health, livelihoods and education)” (VSO).

Getting started: Plan a supporter journey for the next recruitment campaign that you intend running and map out the communications that you intend to send to those who respond before you even ask them.

7. Be able to manage your donor preferences

A supporter journey is about communicating with donors in the way that they want and at an appropriate frequency. You need to be able to switch communications from one channel to another if they ask you to, so be prepared to manage this.

If you ask donors to give you permission to contact them via multiple channels they will expect you to do that; therefore, alternate your communications in order to ensure that you attract their attention in different ways.

You also need to be able to manage moving donors out of your supporter journey if they don't want to be communicated with in that way. Thus, there needs to be an exit strategy that will take them on a different journey that meets their needs.

“Our supporter journey includes postcards, emails, SMS messages, newsletters and telephone calls. If a supporter opts out of one channel we make sure that we replace that communication with another channel” (Anon).

Getting started: Check how donor communication preferences are managed on your database and ensure that they are properly recorded for each donor.

8. Tell your donor a story

Storytelling needs to continue from your recruitment message throughout the supporter journey. Whether this takes the form of continuing the chosen character's 'story', updates about the money raised in the appeal or telling the story from a different perspective, the donor needs to feel that the next communication somehow relates to the first. Stories are very important in keeping the donor engaged, and the problem and solution that you introduce in your recruitment message needs to be resolved at some point; otherwise, the donor will feel that s/he has not made a difference. You need to report on the impact that the donation has made on the issue that needed to be resolved in order for the first story to be concluded when another problem and solution is introduced.

The communications also need to take the donors on a story journey through your cause, beginning with what motivated them to donate to you in the first place, reaffirming their support by updating them, helping them to explore the issues, expanding on their knowledge of the charity and then building on that to deepen their commitment.

Your stories need to be emotive and compelling. You should introduce some WOW moments in which you deliver the unexpected to your donors.

“The first communication is usually the volunteer’s feeling and preparations before they leave home. The next is their first impressions upon arrival. Subsequent emails/postals tell the story of the volunteer’s placement: challenges, successes, food eaten, friends made, things missed!” (VSO).

Getting started: When you are planning your communications for your next campaign, use Post-it notes to plot out the story you are trying to tell the donor over the next few communications. By doing this, you will know that you have continuity of the story and that you have reported on the impact of the supporter’s donation.

9. Don’t always ask for something

Your supporter journey should have a combination of thank-you messages, informative communications, non-financial asks and financial asks. How much of each will depend on the group of donors you are addressing.

Think about using postcards, surveys, thank-you telephone calls, invitations to events, video messages and newsletters, so that your donors are happy to receive a communication from you rather than expecting a financial ask all the time.

If you engage your organisation, content will start to appear organically and you can begin to include some ‘ad hoc’ communications that your donors will find relevant and authentic. These non-ask communications, such as ‘we thought you might like to see this’, which are sent in a timely way (in other words, not part of a rigid plan, but part of a more flexible journey that is about highly relevant communications) can be more engaging than something highly ‘designed’.

“Asks can include signing petitions, sharing messages and other non-financial actions” (Anon).

Getting started: Think about getting some photographs relating to your beneficiaries that you could make into postcards to send to your donors as a surprise thank you.

10. Ask your donors how they feel

Measuring donor satisfaction is an important element of the supporter journey, but is one that seems to be quite difficult to implement. Survey forms are one of the ways of doing this, but do make sure that you are able to react to anything about which you are informed on the form. Other simple ways to measure satisfaction are to ask for feedback in your communications, or to pick up the phone and talk to your donors occasionally.

However you do it, you need to be able to adjust your supporter journey based on the feedback you get. The main reason for beginning a supporter journey is to make donors feel more engaged and involved with your organisation; therefore, you have to have some way to determine if you have succeeded in this regard.

“They love it! We have an inbox where donors can send messages and comments to their linked volunteer. We manage the inbox and send the messages to the volunteers in a bundle. We’ve had so many lovely comments, and one donor even named their grandchild after one of the VSO volunteers!” (VSO).

Getting started: Next time you have a campaign, pick up the phone and thank some donors. Use the conversation to find out what they thought about the communication and what motivates them to donate.

Delivering supporter journeys can be a daunting prospect; however the benefits of having more engaged, informed and happy donors are worth the investment of the time and resources to begin the journey and to do it correctly from the beginning.

Case studies

The Ontario Nature Love Story

As fundraisers, we must remember that our biggest champions and advocates are our staff and volunteers, and we need to have as many voices as possible sharing their knowledge and passion with other people.

The stories and information that they can provide is absolutely critical to develop a really meaningful, authentic and organic supporter journey that results in donors feeling engaged and part of a team with shared values and passions.

This is not just a supporter journey...this is a love story

The Ontario-based fundraising agency, Agents of Good, have been working with Ontario Nature over a period to produce a supporter journey that is based on a highly donor-centred approach.

The first thing that had to happen was internal change. This story didn't start with a supporter journey grid, it started with a need to get everyone in the organisation on board to provide a donor experience that was authentic and genuine, something that they valued and of which they felt part.

The team at Ontario Nature started a process of change across the organisation, working with communications, programmes and the executive team to develop the understanding that donor-centred fundraising wasn't just about being more lucrative, but would really build the community.

The thing that staff and volunteers at Ontario Nature are most passionate about is the cause – which means that they have something very much in common with the donors. The Love Story is about finding ways to capture voices and share information from a range of people, and to create a real sense of belonging.

Using field reports from voices on the ground, and sharing voices of other donors and members in appeals and communications, created a sense of conversation and dialogue. Donors connect with the shared values and voices of the organisation.

“It's a great message to share with staff and volunteers that sharing our passion and stories makes our members and donors have a great experience and together, we advance the whole mission. Everyone started sharing stories and information that could be sent to donors that demonstrated need, impact and started to develop a 'bridge' between the programmes staff and donors. It developed real enthusiasm for seeing donors as partners, as people who shared values rather than people who simply donate funds” (Ontario Nature).

Therefore, instead of starting with WHAT a piece was going to be, the basis of the donor journey became objectives and feelings. It is not a rigid journey that takes place and is replicated, but a journey that involves relevant communications at key times to produce an experience that is rich, authentic and relevant. Key factors in this journey are:

- Knowing donors
- Connecting values and emotions
- Using the right voices
- Feelings and objectives instead of set 'pieces'

For the first few months, a new member will be part of an ‘onboarding’ welcome journey, which will involve a number of interactions, including a telephone call. Following this, all donors (in this case members) receive the same things.

“When the starting point is ‘how do we make them feel’ over ‘we send them this brochure at month 5’ a donor journey takes on a very different approach” (Ontario Nature).

Instead of the touchpoint being ‘let’s send a survey’, the feeling was ‘how do we make them feel that this is a dialogue and a relationship?’ Instead of the starting point being ‘let’s ask them to tell us something’, the starting point was ‘how do we make them feel that we care what they think?’

For example, a member survey will be sent in some years, while there will be different interactions in others depending on what is happening at the time. An example of this might be asking donors what they want to see on their membership card, giving five or six options and then giving feedback about the winning design, which will then influence some of the other communications in that year.

“Below is a skeleton grid of how this works – ‘what it is’ will be different each year.

LOVE STORY GRID								
	Week 1	Week 1-2	Week 4	2nd month	3rd month	4th month	5th month	6th month
objective	welcome!	thank you & receipt	getting to know each other	surprise and delight	ask, highly variable	action	surprise and delight	demonstrate impact
what is it?								
feeling	sincere, happy, friendly	transparent, accountable	this is a dialogue, a relationship	wow! Amazing!	I can see how my gift will make a difference	this is great! I can do more than just give	wow! Amazing!	proud to be part of this
metrics								

	7th month	8th month	9th month	10th month	11th month	12th month
objective	action	surprise and delight	how are we doing?	action	surprise and delight	demonstrate impact
what is it?						
feeling	this is great! I can do more than just give	wow! Amazing!	they care about what I think	this is great! I can do more than just give	wow! Amazing!	proud to be part of this
metrics						

At every point, the donor is at the heart of the journey. What this means in essence is that it might be a small action – for example, a social media interaction – but the feeling that the

donor gets is a highly thought through emotion that will help to increase loyalty.

The Results

Overall, the programme has enjoyed great growth and, whilst it is not always possible to attribute an ROI to every interaction (by the very nature of the programme, there are multiple touch points – thus, it is focused on overall growth rather than on individual campaigns), there are notable ‘wins’ including 45% response rates to lapsed reactivation mailings. Overall, Ontario Nature has achieved 143% growth in the programme over approximately five years.

This case study is a combination of information provided, and conversation with Agent Jen Love, Agents of Good – compiled by Rachel Hunnybun for the Commission on the Donor Experience.

VSO supporter journey case study



Why a donor journey is important for us

Volunteer View is VSO's main programme for recruiting regular givers. As an international development organisation, VSO sends skilled volunteers out to work with local communities around the world to bring about long-term, sustainable change. We wanted a wonderful donor journey to make our supporters feel engaged, valued and involved in our work overseas. They might not have the ability or capability to volunteer themselves, but from their homes in the UK they could support our volunteers out in the field. We wanted our donors to feel part of the difference we make. Volunteer View is exactly that – it gives our supporters a "view" into the real life and work of a VSO volunteer.

Volunteer View also helps us to protect against high attrition. It aims to build a deeper connection between the supporter, the volunteer and the people they are helping together. This is best achieved by taking the supporter on an emotional journey and making it clear why there is a need for their ongoing support. We try to make the experience as close and personable as possible, with donors hearing from real people carrying out VSO's work on the ground. We want our supporters to feel they are really making a difference and contributing to something amazing. Engaged, happy donors who are confident in the impact of the charity and their donations will give for longer and enable us to commit to long-term projects.

What Volunteer View looks like from the donor's perspective

When the donor is first approached about donating to VSO, by a door-to-door fundraiser for example, they are told that as a regular giver they have the opportunity to be linked to one of our volunteers in the field. We generally give the donor a choice of three volunteers to choose from, each working in one of our key sectors: health, education or livelihoods. We've found that donors tend to choose a volunteer based on the type of work (if they are a teacher themselves, they will probably be interested in education), or the country the volunteer is working in (the donor may have specific interest in an area already) or on the part of the UK that the volunteer hails from (always lovely to support someone local to you!).

Once the donor signs up to a regular gift and chooses a volunteer, they are given a small thank you booklet, which tells them more about VSO as a charity and shares some volunteer stories. They also get a profile card explaining more about their chosen volunteer: problems in the country they are working in, solutions they are bringing etc.



After receiving a welcome call and a formal advance notice detailing their direct debit details, regular givers who have an email address receive a personalised thank you email from their chosen volunteer. This links to a personalised, one-time watch, online video in which one of VSO's returned volunteers, news presenter Jon Snow, thanks the donor once again for setting up their gift.

The second thing our regular givers receive is an email or postcard timed to arrive one day before their first gift is taken. Both are personalised and written from their chosen volunteer. Generally, the content talks about the volunteer's preparations and expectations before travelling out to their placements: what they will miss most, what they are most excited about etc. We also encourage donors to click or visit their volunteer's blog, where they can read more and see pictures.



Examples of Email 1 and Postal 1

Just before the second gift is taken, donors receive another email or letter from their volunteer. Again, these are personalised and written just after the volunteer has arrived at their placement. They talk about their first impressions, what their new home is like, who their colleagues are and, sometimes, what strange food they have tried! Again, the donor is encouraged to link to or visit the volunteer's most recent blog post for more content and photos. We make all the text as warm and personable as possible so the donor feels connected to their volunteer and engaged in their VSO life.





My first impressions as a VSO volunteer in Nepal

You've been generously supporting VSO for a few months and you must be wondering how I'm getting on. I thought I'd send a quick update now I've arrived at my placement in Nepal.

Spice and rice galore!
 The sights, smells and sounds of life here are truly extraordinary. In the cities, the smell of cooking and spices fills the air and everything, from the clothes to the lorries, is an explosion of colour. In the countryside, miles of green rice paddies blend into the slopes of the world's tallest mountains creating some amazing views.

But beneath all of this, Nepal is struggling with some of the highest poverty rates in Asia. Poor access to education is preventing many children from escaping the poverty they've been born into. Many are facing an uncertain future. With one in three of the population aged under 15, improving education has the potential to lift this generation – and the entire country – out of poverty.

Fighting gender inequality
 Since arriving I have seen how women and girls are disproportionately affected by poverty here. About 30% more boys are sent to school as a parental priority and the girls are kept at home to look after younger siblings, work in the house or in the fields. Current resources and attitudes in schools just aren't sufficient to transform them into places of equal opportunities for girls and boys.

Sisters are doing it for themselves
 The Sisters for Sisters project has been set up to encourage girls, their parents and communities to see the importance of education. It works by providing young girls (Little Sisters) and their families with role models and mentors from their community who have completed education.

These are all older girls who are matched with younger girls to support and mentor them through school. They also work with families and wider communities to demonstrate the value of girls' education and encourage the girls to stay in school longer.



Example of Postal 2

With the donor's third gift they fall into our retention cycle. If they have an email address, they receive six personalised emails per year from their volunteer. If they prefer post, the donor receives three letters per year. Each communication is supported by a blog post, where the donor can read more and even send messages or questions to their volunteer – and lots do!

Volunteer and donor are connected for as long as the donor keeps giving and the volunteer is in the field. When the volunteer returns home we introduce the next featured volunteer working in the same sector and re-link the donor to them when the handover time comes.

How much our donor's love it!

Our donors really seem to love Volunteer View! Many feel closely connected to their volunteer and send messages of hope, encouragement and wonderment to them via the blogs. Here are some examples of the messages received:

- "Great to hear from you just before Christmas Sam; you certainly are kept busy and I can read your blog and gain a good idea of the training you are giving to local people which is all aimed at improving standards. Well done. Hope you enjoy Christmas ... earthquakes and all!!"

- "Thank you Paul for keeping me so well informed during your year and for making me feel a part (albeit a very small one) of the improvements you have made. Wishing you all the very best for the future."
- "Merry Christmas Simon and a happy new year to you and yours. Hearing about your efforts reminds me that there is a wider side to life."
- "Hello Paul, Habari? Thank you for your latest news, so pleased you are so enjoying your teaching and now Rebecca is a teacher and mentor, mazuri sana. My Swahili is very rusty after nearly 60 years but Tanzania will always be in my heart especially Lindi being my first posting with my husband...Kwaheri and nenda salama."

Practical Action Case Study

Introducing a non-ask piece in the welcome journey for cash supporters.

Background

All new individual donors enter a welcome cycle when they donate to Practical Action. Their journey depends on their initial gift type, their recruitment channel and their gift amount.

Within a broad range of work, and multiple acquisition subjects running, a cash donor responding to a specific appeal might then receive a pack about something completely different. This could come across as confusing and irrelevant - for example, a donor could respond to a campaign about water sanitation, and then receive a next ask about food shortages with no link between the two areas of work or reference to what motivated the donor to give in the first place.

Whilst this was recognised as an issue, resource limitations did not allow for there to be a journey for these lower value donors that would tailor the second ask pack to the subject of every acquisition piece.

Practical Action had research-based evidence to say that their donors were generally of a higher educational level than was the average population; therefore, it was decided to try to understand if trying to educate and expand on the detailed technology and the impact of their work at an early point in the journey quickly would improve the donor experience. It was hoped that this would consequently improve the relevance of the next appeal ask and therefore also improve financial results.

The Test

In 2015, Practical Action undertook a three month, 1,000 new donor split-test in the cash welcome cycle. The test included all new donors who gave a first cash gift through on- and off-line channels, and who donated less than £1000.

It was decided to produce a one-size-fits-all 'light touch' introductory version of the donor magazine, Small World. Articles were chosen to highlight some of the most successful and impactful campaigns across the entire mix of project work. All articles were re-written to assume no prior knowledge of the charity, and a smaller A5 format was chosen because it would be easier to 'get into' than the bigger A4 magazine. Information sections that

introduced the supporter care team were included to encourage new donors to feel welcomed and valued.

The test was a simple straight split that included two segments (magazine or no magazine). A donor was either in group A or group B – if in group B, the mini version of the supporter magazine was mailed to donors two weeks after their first cash gift thank-you letter.

A - No Magazine Control Group: Cash gift - within a week, a thank-you letter, four weeks after the thank-you letter a cash ask pack, four weeks after cash ask pack, a regular giving ask pack.

B - Magazine Test Group: Cash gift - within a week, thank-you letter, two weeks after the thank-you letter a mini supporter magazine, four weeks after the supporter magazine a cash ask pack, four weeks after the cash ask pack regular giving ask pack.

Results

Anecdotal results from the supporter care team were positive. Whilst no actual conversations were recorded, feedback was positive and a higher number of non-financial interactions were noticed from the group that had received the magazine than from the group that did not.

The results were quite conclusive. Including feedback quickly to donors on how their donation would make a difference increased the likelihood of them donating again.

The second gift cash appeal saw a significant increase in the response rate from 2.99% (no magazine) to 11.11% (with magazine). The regular giving ask pack also saw an increase from 1.19% to 2.78% in monthly pledges.

Conclusion:

Including a non-ask piece that introduced the work that the charity performed increased the next engagement significantly; therefore, based on this and on anecdotal evidence, Practical Action can assume that this will certainly have improved the supporter's experience.

King's College London and King's Health Partners supporter journey

In 2011, the Development and Alumni Office of King's College London integrated with the fundraising teams of Guy's and St Thomas' Charity, Maudsley Charity and King's College Hospital Charity to create a single fundraising and supporter development office (F&SD) under the joint leadership of King's College London and King's Health Partners. After the initial three year period of integrating all the necessary fundraising functions and the development of the engagement programmes, the decision to develop a supporter journey project, focusing on supporters and donors within our mass audiences was taken in 2014.

The aim of the supporter journey project was to look at how the F&SD department could become more 'supporter-centric' in order to maximise consideration and conversion as cost effectively as possible. Fundamentally, this meant ensuring that the department was communicating the right things to the right people at the right time across the entire database.

From the beginning of the project, it was important to have a clear idea of how success would be identified. Essentially, this came down to three key areas:

1. A clear and agreed supporter segmentation on which all communication plans are based.
2. Greater insight – knowing the right things in order to determine the plan.
3. Working practices – demonstrably different and joined up.

We already had two very distinct audiences to begin with: our KCL alumni and our hospital supporters. So we knew we'd need to look at different journeys for each of these groups. Through a combination of qualitative and quantitative research and analysis and various project groups with staff involved from across the department, we were also able to identify three key segments within each of the alumni and hospital audiences. We knew that we would need to consider and develop quite different journeys for each segment.

Alumni segments

- o New graduates.
- o Non-donors, alumni aged 40 and over.
- o Supporter once alumni donors.

Hospital segments

- o Hospital users (not currently on our database).
- o Data only (individuals on database who were yet to donate or take part in fundraising event).
- o Supported once (both donors and event participants).

The whole initiative has been a cross team effort from the very start. We knew that the most important outcome would be to ensure that our fundraising and engagement programmes were fully joined up, and that all relevant teams within the F&SD department were focussed on the same key segments and incorporated them into their plans. While the main driver was ultimately to see an uplift in income we ensured that the key segments were incorporated with the operational planning templates for all relevant teams within the department, so that annual plans could focus on deliverables for these key segments, in terms of both financial and non-financial activities e.g. events/engagement/communications. KPIs were agreed across teams and regular working group meetings for each key segment have helped to keep momentum and ensure that plans are joined up and complement each other.

It's important not to try to implement too many things at once, to avoid not being able to measure what is and isn't working. For us it has been important to get the thanking and welcome processes right and ensure that we're able to deliver these promptly and consistently to all donors, no matter their entry point. It needs to work for existing channels but also for any new acquisition initiatives, so it's important to take time to get those right from the start.

It's also important to ensure that messaging is consistent through the journey. There's no use in having a thank-you letter and welcome pack which says one thing, but then your supporter newsletter/website/stewardship says something completely different.

While the uplift in income has been the main focus, for our alumni relations team it was also important to recognise the role of the supporter journey in the transition between students to alumni. Therefore there has been a real focus on student engagement to ensure that when we engage with them as alumni in future, again we have that consistency of message.

Another key element is making sure that all data selections across the department are using the same segment definitions and work very closely with data teams to make sure everything is captured effectively on the database for future tracking and analysis.

Feedback has been quite difficult to measure, since as far as donors are concerned, they may not have noticed any significant changes and we're still at the early stages of implementation. We haven't yet planned to repeat the qualitative and quantitative research which was carried out at the very beginning of the process, but it's something we are mindful about. We'll be monitoring the impact on donor numbers and retention rates over the next year or so, which will be the most important measure of whether it's working.

From Donor journeys to Supporter journeys – trends and expectations

Ellen Janssens - Dutch Heart Foundation

In [‘The Big Five Trends in Fundraising – Are you prepared?’](#) a number of questions were raised on the future of the donor journey. On the future of fundraising. For example:

- How will we fundraise in two to five years?
- How will we cooperate, within and outside of our organisation?
- What will be the non-fundraising engagement stages that we can offer to donors, to enhance their journey with us?

In my personal opinion, separate fundraising departments will no longer exist in five years. More and more, donors want to feel part of the mission they support. They want to be able to contribute on their own terms, be part of the solution. Non-profits need to make the transition of thinking in transactions to thinking in relations. However, to be able to facilitate supporters in contributing to our mission with their time, knowledge or network, we need a close cooperation with all departments within our non-profit. Other technological opportunities, like Experience marketing (Virtual Reality and Augmented Reality, facilitating ways to experience both the need for, as well as the impact of their contribution), Digital transformation (blogs, chats, videos) and the customer needs behind the Block chain technology (enforcing transparent and earmarked donations) also require an extremely close cooperation between the departments. Between the fundraisers and (the activities for) the beneficiaries.

I strongly believe in 5 years we will have integrated teams, responsible for specific combinations of non-profit activities and donor segments, instead of separate departments separated by their specific tasks.

Donors will become supporters. New supporters will want to be able to share their time, data, knowledge, experience, network and/or opinion and take more ownership of their contribution to charity’s mission. The Children’s society posted an excellent presentation on this subject: [From Fundraising to Engagement Building](#).

We could see this as a threat, but I’m personally convinced this is nothing more than a huge opportunity for non-profits. It provides us with an excellent (and necessary) way to engage with our supporters before asking for their money. The first point of entry in Donor Journeys will be different ways to engage with the organisation, based on the needs of the supporter, not on our needs.

E.g. for us as a health organisation, this might be a contribution in time (volunteering). Or in data (providing us with health measurements to accelerate research). Or expertise/vote in deciding which research we should focus on.

This will also have a huge impact on their loyalty, but even better: it will facilitate non-profits in fulfilling their mission in the most optimal way. The networks of engaged supporters, their (collective) knowledge and experiences can be extremely valuable assets, probably even more valuable than their financial donations.

For example, the infinite value for innovation. New technological opportunities arrive at an ever growing pace. New entrants in the charity arena are introducing new business models and new ways to ‘do good’. Value chains are changing, roles are disappearing; every organisation has to reconsider and prove its added value. Innovation, creating new business models and marketing propositions can only be successful if its customer driven. Or even better, based on

co-creation. For that, we need the cooperation and knowledge of our supporters, individuals as well as corporates.

So, the real question should be if the ultimate goal of a customer journey should always be to ask for money. Or: how can we measure a supporter's Life Time Value when it comes to his or her contribution in time, network, etc.

Another important part of the supporter journey will be the interaction. The part where we get to know our supporter. Find out their needs, their motivation to contribute, and the ways they can and want to contribute to our cause. We have to find ways to make it interesting for our supporters to share this information with us, to convince them that we want to provide us much value to them as possible.

With every interaction with our supporter, the 'what's in it for them' should be clear.

As a health organisation, we could for example provide health advice, recipes or training schedules. Or feedback on what we were able to accomplish with the time, data or money they provided to us.

Appendix 1: Research sources

1. Relationship Fundraising: A donor-based approach to the business of raising money by Ken Burnett
2. How are you managing the donor journey? by Tony Elischer – 101 Fundraising
<http://101fundraising.org/2013/08/how-are-you-managing-the-donor-journey/>
3. The Donor Journey Pocket Guide by Rogare
4. How to love your donors (to death) by Stephen Pidgeon
5. Relationship Fundraising Volumes 1 to 4 by Adrian Sargeant, Rogare
6. The Supporter Journey – myth or reality? Think Consulting Solutions
<http://www.thinkcs.org/supporter-journey-myth-or-reality/>
7. The User's Journey by Donna Lichaw

Additional context and background

- See also CDE project 3, Satisfaction and commitment, here.
- See also CDE project 4, Thank you and welcome, here.
- See also CDE project 13, Giving donors choices, here.
- See also CDE project 18, Supporters as advocates, here.

Recommended further reading <http://www.thedonorvoice.com>

<http://www.thedonorvoice.com/is-donor-centric-real-or-unicorn/>

Appendix 2: Methodology

The project recruited a group of fundraisers from within the enthusiasts to determine the scope of the project, carry out the mystery shopping, design the questionnaire and liaise with participating charities. The group has also reviewed the final report.

Rachel Hunnybun, Donor Voice

Steff de Simone, Care2

Hayley Lloyd, Practical Action

Gabi Field, St Catherine's Hospice

Jennie Sullivan, Great Ormond Street Hospital

Lily Davies, Chickenshed

Nine charities completed our questionnaire about the supporter journeys that they have developed. The questions asked can be seen in the VSO case study example above.

Prostate Cancer UK

VSO

Practical Action

Rethink

Greenpeace

Four charities wished to remain anonymous

We spoke with Jen Love from Agents of Good and Ontario Nature in Canada via Skype, and they shared their experience of developing a supporter journey.

We also received a case study from Murat Ismail from King's College London and King's Health Partners, as well as an article from Ellen Janssens from the Dutch Heart Foundation