

05

How to communicate at optimum, from the start

Project 05. The supporter's journey

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The original 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.

For senior management and trustee boards, this project will:

- Show why the journey of a supporter is important and why fundraisers must plan communications around a donor's motivations, identity and preferences.
- Help their understanding of why and how fundraisers use the supporter journey to better engage, inspire and delight donors.
- Explain the benefits that will follow when their charity plans better supporter journeys across all types of giving.
- Reduce the guesswork needed for their fundraisers to implement effective supporter journeys by explaining how to identify the needs of the donor.
- Show why the first 12 months is crucial and that investment in this area is essential for long-term fundraising success.

For donors, this project will:

- Increase the relevance, inspiration and engagement of content they receive from a charity.
- Reassure donors that their money is making a difference and that they made a good decision in giving.
- Reduce the chances of them stopping their giving through inappropriate messaging and communication.

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'. See also project 06 – *The use and misuse of emotion*.
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. See also, CDE project 04 – *Thank you and welcome*.
- 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. See also CDE project 01 – *The use and misuse of language*.
- 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. See also CDE project 03 – *Satisfaction and commitment*.
- 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