How Technology Will Facilitate the Sector's Shift

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It's December 31st, the busiest day for online fundraising. At NTEN, we've got just one email queued up to go out. We still think it'll have a good response, because it's relying on ten or so variables to deliver custom content for each recipient—from giving history to membership status to conference registration.

Messages earlier in the year-end fundraising campaign similarly relied on a dynamic set of variables to ensure that NTEN's supporters received messages based on who they are, and how they've participated in the community. Technology facilitates smarter messaging, smarter asks, and more personalized experiences with our organization. But NTEN is certainly not the only organization leveraging advances in technology to make fundraising a donor-centric process.

There are a number of shifts taking place throughout the nonprofit sector, in organizations of all sizes and missions, which serve as indicators of this accelerated change.

Data

First, let's talk about data. To do so, we'll use an example that isn't about technology at all—an annual gala. Many organizations hold large fundraising events offline where community members, leaders, board members, and donors are all gathered together in one room. And having these members see each other is critical for the event's success.

Board members and staff may be mingling and even making personal asks with individuals. Silent auctions let supporters see how much others are offering and encourages a bit of competition for a good cause. The paddle raise combines the ask with the peer pressure.

Now, what if we turned out the lights and the entire gala was in the dark? Some people may give just to keep the lights on! However, many wouldn't feel the connection, the pressure, or the personal touch necessary to make a donation.

When we move to online fundraising, if we aren't capturing and using data well, we're essentially fundraising in the dark.

Data supports us first in planning for fundraising campaigns. With a rich and complete view of our constituents and our outreach, we can set realistic goals, evaluate past outreach for trends and success, and identify targets in the pipeline as new potential donors.

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In campaign implementation, capturing and using data also allows us to create the same dynamics as the offline gala. We can make personal and meaningful asks if we use our constituent data to help us segment our list based on actions and previous contributions. Plus, non-donation engagement history is critical for fundraising appeals; if I already signed your pledge and came to your event, I want to be thanked and recognized for doing so before you ask me to give. It can also help us add competition by bringing in real-time stats so individuals can see how others are already contributing. But think beyond the fundraising progress thermometer, and consider live donation lists on the website or social media messages of thanks from staff, board members, and community leaders.

Using data well to make personal asks and bring individuals together to see the campaign moving in real-time puts the donor at the center of the campaign. If we don't really know who we're talking to and we send out blanket asks, we have no message to share other than the one about us, the organization. Personalizing messages based on activity, interests, and behavior lets us transform a generic message about the organization to one about each donor, their contribution to our mission, and our collective impact.

Automation

Taking advantage of all your data and creating truly personal messages can be a lot of work. In order to keep your focus on the most valuable tasks, you need to rely on automation. I like to think of this as letting the robots do their work so your staff members can do theirs.

The possibilities with automation may feel too complex or overwhelming, so let's start with prioritizing efficiency. What do you have to do every day or every time someone donates? That action is probably a great one to hand over to the automation robots!

These actions are often administrative messages like donation transaction receipts or subscriber confirmations. You don't want to just set up these messages and forget them, but it would be best if you didn't have to manually send them out yourself.

Automation isn't limited to delivering database messages to donors. Organizations focused on a personal touch for donors are using automated notifications to alert staff or board members to critical actions. For example, in your organization a major gift may be one that is $500 or more. So, if someone makes a donation of that size, a board member receives an email notification and can immediately email or call the donor with a personal thank you.

We know that first-time donors need a different kind of follow up than those who give regularly. An automated welcome series can move messages and outreach off your plate while maintaining the donor experience you want to provide. Set up messages to be triggered over a series of days and weeks after a new donor contributes to thank them, introduce your programs and services, and invite them into your community with other non-financial actions.

People

Technology is a critical component of successfully transitioning to donor-centric fundraising. As much as we may think technology is about the latest device, trending smart phone app, or social media platform, technology is really about people. As a team or organization, you will not be able to adopt a donor-focused model if you haven't first invested in your staff.

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All of the data in the world is worthless if we aren't looking at it, if it isn't in a format that we can use to inform our decisions and strategies, and if we aren't sure what it means. Likewise, automation of messages, notifications, and reporting only saves you time if you've invested effort to make the messages relevant, the notifications valuable, and the reporting readable. So, before we focus on our donors, we need to focus on our staff.

Staff training can't be reserved for the first week on the job. Training on specific tools, learning from sector best practices, and evaluating what's working and what isn't in your own campaigns need to be a part of ongoing operations.

Before you focus on the next technology trend, but sure that your staff members have the knowledge and training to make the ask, the process, and the experience all about the donors.

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