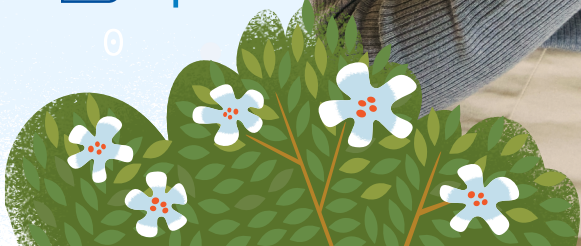


# Donor-Centric Fundraising with AI

A guide to meeting donor needs with the help of **AI**.





## Donors engage deeply with organizations when they have personalized experiences.

Nonprofits are mission-based, and rely on donations of all kinds to fund the activities required to fulfill their important missions. Those donations are often a result of an individual experiencing some level of affinity with an organization. As a donor learns more about an organization and has deeper, richer experiences, those donations (financial or otherwise) tend to increase.

Donors don't just want to be a funding mechanism, they want to be fully integrated with your organization and fully committed to your mission. Giving is personal.

So how do we create those experiences that strengthen relationships with our donors? We have to start by understanding their needs related to engaging with our organization and then meeting them.





In order to anchor our exploration, we looked at Maslow's hierarchy of needs with a fundraising and engagement twist. From the most basic to the most sophisticated, Maslow outlines how human needs are built upon.

We believe the needs of donors follow a similar pattern, from the most basic need of awareness to the more integrated experience of promotion. This chart outlines a hierarchy of needs for your donors and we'll dive deep in to each in the following pages to help you understand how you can begin to meet them and how **AI** can help you do that.

### Ask yourself these questions:

- Are there needs we're not meeting for our donors?
- Do we have the team, the tools, and the plan we need to meet our donors' needs?
- Can we see the connection between meeting our donors' needs and furthering our mission?



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## Awareness

**Awareness of your organization is critical to your fundraising effort. A person cannot even consider donating if they don't know you exist.**

The most basic need for any supporter of your organization is simply to know you exist. Similar to the baseline in Maslow's hierarchy (food, water, sleep), no other interaction can take place if your current and potential donors don't have the most basic information about your organization and mission. Acquiring new supporters doesn't always mean new donations upfront. This is simply the beginning of a relationship with someone who will ultimately make a decision about whether they align with your organization or not.

**AI** can help you identify characteristics of donors who may be most likely to engage with you and help you create personalized messages for them so they have a great first experience with your organization. This applies to current donors as well.

For example, you could use **AI** to determine whether a frequent donor might be a good candidate for a recurring gift program and then make them aware of it.



### Questions

Do you have an acquisition strategy that outlines your mission?

Do you have campaigns made specifically for reaching new audiences?

Are you targeting “look-a-like” donors in your acquisition strategies?

Do your donors have basic information about what your organization does and how your operations support these goals?

Are you keeping your current donors informed about changes in your organization?

### Tips to Accomplish Awareness

Understand the characteristics of the individuals you want to engage with. Really look at the data and group by engagement. **AI** can help make this process faster and easier.

Ensure you have a strong onboarding journey for new donors that plainly explains your organization and your mission.

Make sure your mission is clearly stated and easy to find on your website and any other marketing materials.

## Trust

**Building trust through transparency and consistency of the messaging makes your donors feel more comfortable giving. It's the same security we look for as individuals in our everyday lives.**

Once a supporter is aware of you, they need to know if they can trust you. Trust in a nonprofit is no longer based on legacy or tenure, but by exhibiting trustworthy behaviors and that require all the elements of trust-building we use in our personal lives – consistency, follow-through, and accountability. It also means security, knowing that the information they share with you will be kept safe and private. This is why the Einstein **trust layer** is built-in to our **AI** capabilities.



### Questions

Are you collecting data about your supporters in a transparent and secure way?

Are you publishing donation numbers and how you're using them regularly?

Do you respond to requests from your donors in a timely and complete manner?

### Tips to Accomplish Trust

Make spending reports readily available and update them often on your website.

Keep your data clean and consolidated across all internal teams.

Create a great follow-up experience for donors by tasking real people to reach out.

Create a consistent "brand" for your programs so donors become familiar with what's genuinely yours.



## Connectedness

**Connection is what builds bonds that make donors stick around. That sense of belonging we all seek as humans is applied to how deeply we feel connected to your organization.**

This is the section where most of your donors land. They've heard about you, they know your mission and they believe you're doing the right thing, but they're having a hard time connecting. There's an impasse. This is also a fairly large section of the hierarchy of needs. Many of our fundraising behaviors are part of connectedness. One important thing to consider here is that connectedness is a two-way street – you being connected to your donors and your donors being connected to you.

Personalizing content is always a great way to show your donors your care and that giving is, indeed, personal. It can be as simple as using their name in an email subject line, or keeping the message a bit less formal and minimizing traditional marketing words. Using **AI** to help you draft messages can be a way to create personalized messages for donors much more quickly, helping you reach more donors. These small yet intentional decisions can help form a bond between donors and organization.



### Questions

Do you feel like you're aware of the digital world outside of your organization?

Are you communicating with your donors on their terms?

Is your online donor experience intuitive from the donors' perspective?

### Tips to Accomplish Connectedness

Find out which platforms your donors are on and see how you can set up content and/or giving opportunities. Try something new!

Personalize emails with donor names, donation amounts and any other personal factor (recurring donor, volunteer, etc.)

Create hand-offs to development teams for follow-up actions.



## Ownership

**In this stage, a donor begins to personally identify with your organization, your community, and your impact.**

Connectedness, if done correctly, evolves into ownership. The donor begins to feel like the work of the organization is part of who they are and an extension of their own efforts. Impact is huge in this area. They may think, “Is what I’m doing working?” or “Are our combined efforts helping the cause?” A donor may choose to begin a recurring donation when they begin to feel an ownership of the efforts of your organization.

This is the time when your organization is encouraged to show more transparency than in previous stages. Don’t be afraid to showcase a lesson learned through a tactic that didn’t pan out as planned. Donors in the ownership phase are not scared away by real numbers or even weakness because they function as extensions of your staff or board.



### Questions

Are you acknowledging the commitment of donors when they give?

Do they feel like they’re communicating directly with your organization?

Do you send regular impact reports on an individual and corporate scale?

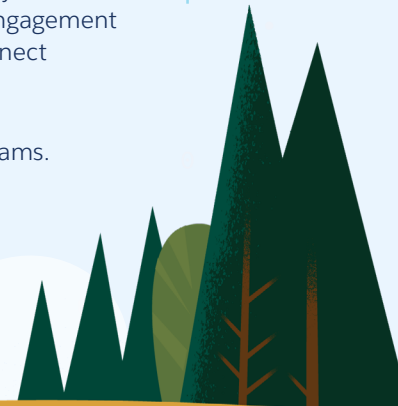
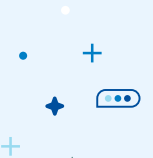
### Tips to Accomplish Ownership

Follow up with donors with where their money went and what specific impact it had.

Send special acknowledgments to your donors when they make significant donations.

Use **AI** to identify segments of donors who may be in the ‘ownership’ phase based on their giving and engagement behaviors and create a program to further connect with them.

Create badges, loyalty, and membership programs.



## Promotion

**Donors are advocating for your organization, putting their time, name, and resources towards fulfilling a mission that's meaningful to them.**

At this point, your donor is completely committed to your organization! So much so, that they're lending their time, their name, their network, and their reputation to further your (now shared) mission. These folks are considering major gifts and even board service. Your organization's mission has become a central part of their personal brand.

Donors at the promotion level are expecting one-on-one attention, phone calls from executive directors and board chairs, handwritten notes, and a fully personalized experience. They are likely interested in what's happening at the awareness and trust levels too, but that's because their friends have just entered your relationship-building cycle and they want ensure a positive experience.



### Questions

Do you have a plan for how to identify donors who may want to make a major gift or engage in your board?

What opportunities do you have for major donors to support your organization in a big way?

How are you creating a culture of philanthropy and including extended teams in stewardship?

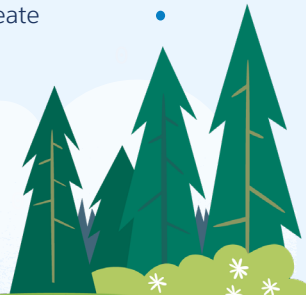
### Tips to Accomplish Promotion

List potential major gift opportunities and where they come from.

Gather as much information about who they are and what they care about.

Allow your advocates to influence your organization, both internally and externally.

Create a process for finding, cultivating, and stewarding these donors collaboratively. Then, use **AI** to help create personalized communications with them.



# Exceeding Donor Expectations



Maslow's hierarchy of needs is just one way of analyzing your donors' needs and expectations. Donors are individuals who want to build meaningful connections with organizations and their missions.



Try this worksheet to evaluate if and how you're meeting donor needs. This will enable you to start ideating how to build incredible experiences to bolster your relationships with your donors.

**1.** Who are our donors and what are their personas?

**2.** What needs are you meeting well?

**3.** What's something you can change TODAY that will help you meet the needs of more donors?

**4.** How can you use AI to help you efficiently meet your donors' expectations?





