Welcome to Bloomerang Academy

Thank you for joining us!

Please tell us your what the weather's like in your area....drop it in the CHAT!

Housekeeping

Live Transcript

Share ideas

Ask questions

We all know what we want to do is spend administration and more time Doing the w

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Chat

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Q&A

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Our dial in number in case you need it today: **+1 669 900 6833**

We will share the slides and recording of this session with you via email later today.

Any questions we are not able to answer live or in the Q&A will be addressed after the session via a follow-up.

If you need further assistance, please reach out to support@bloomerang.com. Our support team is amazing!

Drive Greater Impact with Data-Driven Donor Segmentation

Diana Otero

Product Marketing Manager

Diana Otero is a Product Marketing Manager at Bloomerang. She served on the board of the Nantahala Hiking Club, one of the 31 trail maintaining clubs of the Appalachian Trail Conservancy, a nonprofit driven and powered by volunteers. She is currently an active volunteer and auxiliary member of VFW Post 7119 in Indianapolis, IN, a nonprofit veterans service organization.

Agenda

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Donor Segmentation

grouping supporters based on common characteristics

crafting tailored messages

in order to increase the effectiveness of your appeal

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Nonprofit stories of segmentation in action

Year-End Segmentation: Better2gether RVA

Segment	Current	Lapsed
Long-Term Donors	made a gift in 2022 & 2021 (or longer) but hasn't made a gift since Oct 1, 2022	made a gift in 2021 & 2020 (or longer) but not this calendar year
First-Time Donors	made their first & only gift this calendar year (Jan 1 to Oct 31)	made their first & only gift in 2021 but hasn't renewed in 2022
Lapsed Donors		everyone else defined by giving $25 or more in the past 3 years but hasn't made a gift this year
5K Event Participants	participated in Halloween Hustle 5K in October but didn't donate	

Year End Segmentation: Long Term Donors

Dear Josh,

Your loyal support means the world to us and is making an impact in helping kids with serious illnesses. I'm hoping I can count on you again with this important ask to help ensure families struggling to care for their medically complex child have the resources they need.

WE'RE GRATEFUL FOR YOUR LOYAL SUPPORT!

Yes, I will help! Please use my gift to provide support and care to medically complex children and their families and to support all the work of Better2gether RVA.

Enclosed is my gift of:

☐ **$500** to support a family   ☐ **$550** to support a family   ☐ **$600** to support a family

☐ **$**_____ to help as much as possible

See reverse for gift payment options.

Donor Josh
Addresss
City, State Zip

Better2gether

PO Box 29351 • Henrico, VA 23242
804-482-1584 • Better2getherRVA.org

Segmenting Tips:

- Use the same letter but find opportunities to customize to segment.

- Show the donor you recognize them for who they are - loyal, new, important, etc.

- Make donors feel good, feel needed.

- Customize the ask based on their giving.

Year End Segmentation: Letter Examples

First-time new donors

- We're so grateful you made your first donation this year to Better2gether's mission of supporting kids with serious illnesses. As a small nonprofit, every donation means the world to us which is why I want to ask for your help....

First-time lapsed donors

- Your first-time gift made an impact last year in providing care and joy to kids with serious illnesses.

Lapsed donors

- I'm so grateful for your past donation to provide support to kids with serious illnesses.

Year End Segmentation: Results

Measure	2021	2022
Mailed Appeals	250	263
Households Donating	33	38 (44)
Response Rate	13.2%	14.4% (16.7%)
Avg. Gift Size	$392	$419 ($525)
Revenue Growth		23% (79%)

Note: Numbers in parentheses represent totals if including a Board member gifts which were directed away from the year end appeal to support another campaign effort.

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Clean data & data segmentation 101: Some tips for success

Data Hygiene

It's important to develop a data management plan that is consistent with your fundraising strategy.

Even with good data enrichment practices in place, your data quality is still getting worse. Frustrated? Don't be. Instead, be proactive.

1. Get a data quality assessment of your donor data
2. Document your data needs
3. Determine your data gaps

ACTION: Once you have clean data it's time to create a plan and start segmenting

Where do I start?

- **Recency**: How long have donors been giving?
- **Frequency**: How often do donors give?
- **Type**: How are donors giving?
- **Amount**: How much are donors giving?
- **Reason**: Why do donors give?
- **Interest**: What topics are donors most interested in?

Where to Start with Communication Segments

Above average gift amount

| New Donor | Repeat Donor |

| New Donor | Repeat Donor |

At or **below average** gift amount
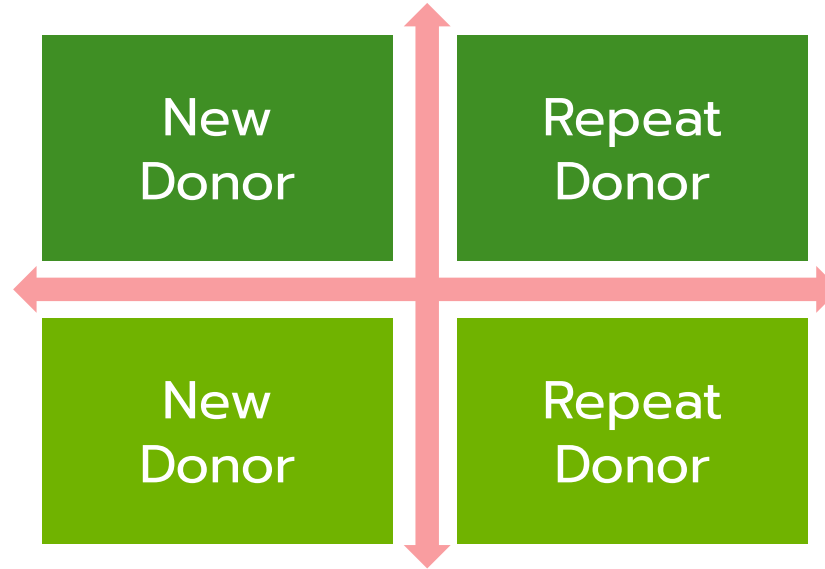
70% of survey respondents who gave $10K to one organization also made a $100 gift to another organization. (Penelope Burk)

New donors rarely give at capacity!

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Our favorite 7 donor segments

While there is an almost infinite number of ways to segment or organize your donors into smaller groups, consider these 7 segments as an easyway to get started.

1. First-time donors

2. Monthly donors

3. Lapsed donors

4. Volunteers who have never donated

5. Donors who have shared feedback, positive or negative

6. Social media followers who interact with you

7. Long-term donors

Demo

Success Factors

What we saw work in 2020-2021

Effective storytelling and segmentation played a big role in the organizations that saw success in 2020/2021

1. Don't stop fundraising
2. Segment your communications
3. Double down on stewardship
4. Employ the personal touch
5. You don't need events to tell stories

Source: 2011 study by DonorVoice

Segmentation doesn't mean impersonal

Authenticity and personalization are key!

Our philosophy: Segmenting shows that you care about the donor; you take the time to know them, to see their involvement, and to **communicate with them the way they want** vs a blanket-approach. Takes staff time but it's an investment with return!

4 tips for stewarding each donor segment

Develop message themes for each segment

Develop communication tracks

Mix things up

Get your board & CEO involved

Demo

Resources

Optimize your database for higher performance.

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"We are touching our donors more and with higher quality and more impactful communications now that we know so much about what resonates with them. I know this is having an impact on our dollars raised

Valerie Fitton-Kane
Director of Development & Partnerships
Challenger Center for Space Science Education.

How we do it

Database Audit
A Bloomerang Data Consultant will conduct an extensive audit of your database and identify opportunities to improve data performance.

Personalized optimization strategies
You'll meet with your Bloomerang Data Consultant who will provide you with recommendations to optimize data performance such as cleansing and standardization.
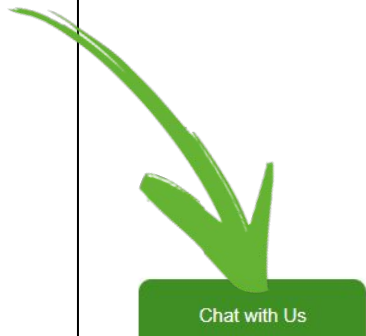
Services tailored to your needs
Upon completing your audit, your Data Consultant will provide you with a recommendation that may include a combination of up to three Data Services and/or Data Coaching.
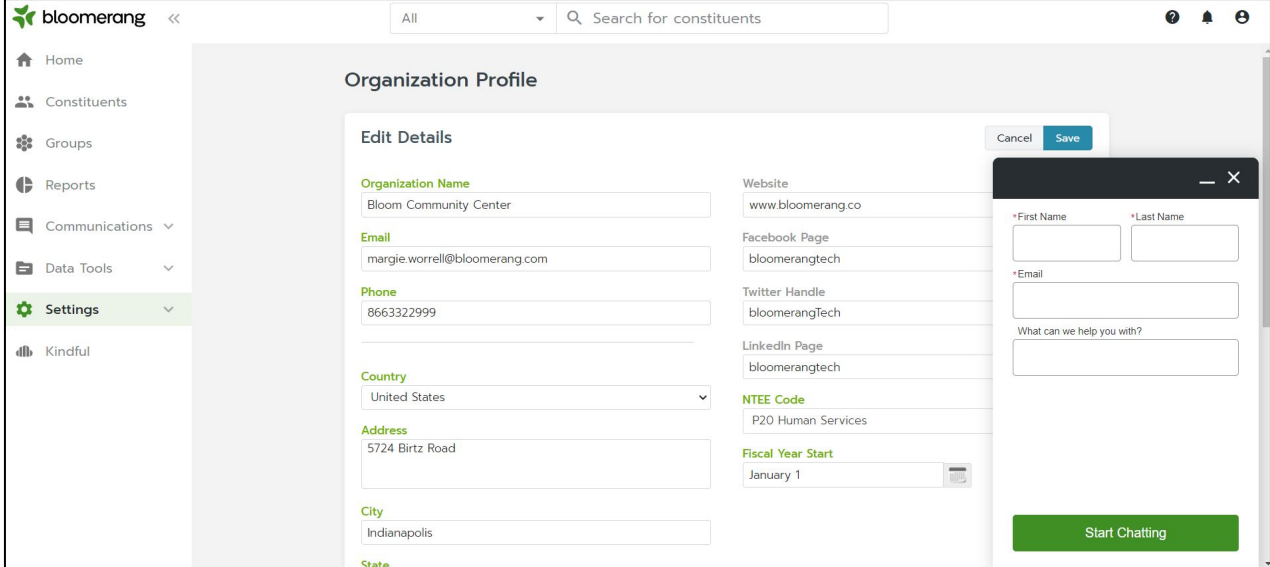
Resources

Bloomerang Knowledgebase and Support Portal
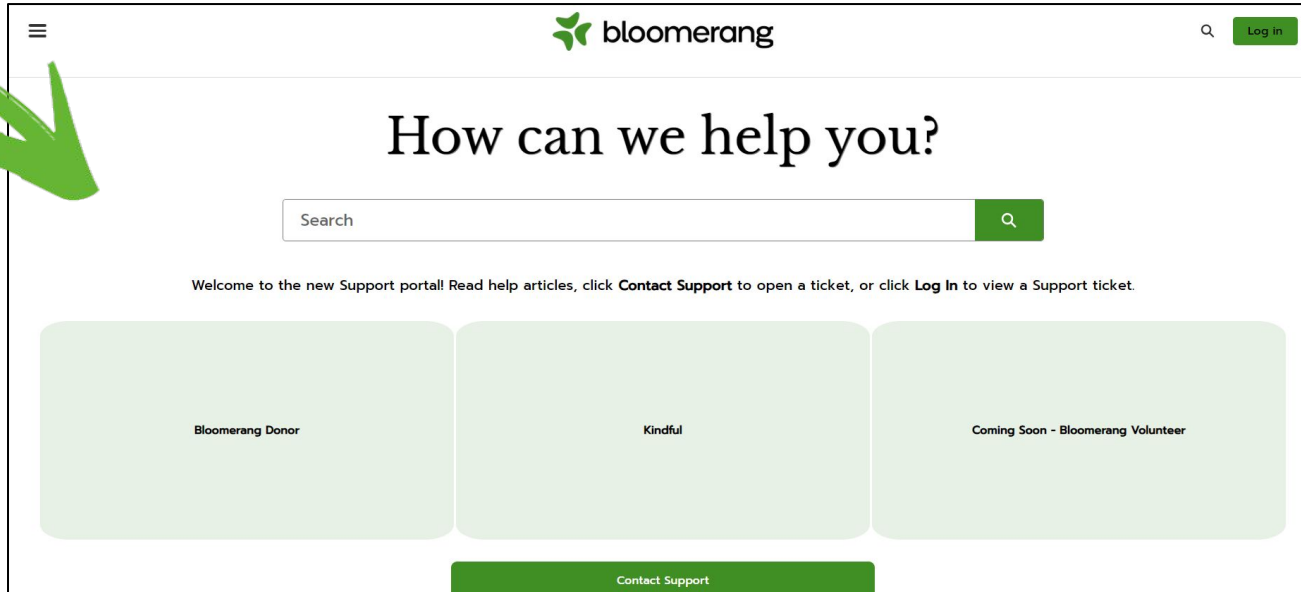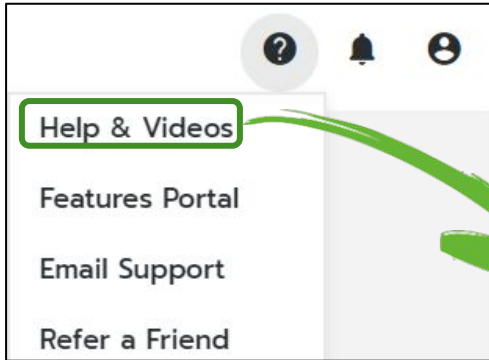
Live Chat has a new look and a new location!

Thank you