



Convert to Regular Giving Playbook

This playbook will help you grow your regular giving program by converting more one-off donors to monthly giving.



Smarter Fundraising for a Better World

Building your regular giving conversion 'engine'



You put a lot of effort and often a lot of money into acquiring new regular givers. But did you know that your existing cash donors are one of the best, and cheapest, sources of new potential regular givers? Let's build a reliable system to identify the best prospects and then convert them in a predictable way.

- 1** Predict: Use Dataro to predict which one-off donors are most likely to convert each month.
- 2** Engage: Try different tactics to engage with these donors about regular giving. We recommend calls.
- 3** Measure & Repeat: Track campaign results, adjust tactics & volumes, and increase conversions.



1 Select your optimal churn campaign list size



- Login to the [Dataro App](#) and go Campaign Suggestions find your recommended monthly campaign size. Dataro calculates this using predicted responses to estimate the campaign size likely to yield the largest net return.
- If you're planning a quarterly conversion program, rather than monthly, just multiply the suggested size by three.

Recommended
campaign size



DM 24M Lapsed 250 Total Appeal Volume		RG Churn Contact 500 RG Donors per month	
RG Upgrade Contact 200 RG Donors per month		RG Reactivation Contact 250 Lapsed RG Donors per month	
Convert to RG Contact 500 RG Donors per month			



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Add the one-off donors most likely to convert right now



- Using the 'Dataro Convert to RG Rank' field, add all donors with a rank equal to less than your desired list size to the campaign. E.g, if you desired list size is 500, select all donors with a rank ≤ 500

Select desired list size using
the 'Dataro Convert to RG
Rank'



Dataro Convert to RG Rank ×

This value ▾

Less than or equal to ▴

500

Apply Clear Cancel

Example shows query in RE NXT



3 Apply exclusions to remove people you don't want to contact



- There are certain exclusions you should apply to your lists, depending on the channel you're using. They might include: donors with a 'do not phone' exclusion, communication opt-outs, major giving prospects, and anyone who has said 'no' to a regular giving ask in the past 6 months.

Apply recommended exclusions, plus any others you think are necessary



Exclude solicit codes

Find in this list

Show inactive

Select all Clear all Only show selected items

Do not phone

Apply Clear Cancel

Example shows query in RE NXT



4

Adjust your list back to the recommended size



- After you've applied exclusions, your list will be smaller than Dataro's recommendation. Adjust your query to add the next-best ranked donors to get back to the recommended size. E.g, adjust your selection from the top 500 to the top 1000 ranked donors (i.e. the 1000 most likely to convert to regular giving).

Adjust your query replace donors who were excluded. Your final list size should be close to Dataro's recommended list size



Dataro Convert to RG Rank ×

This value

Less than or equal to

Example shows query in RE NXT



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Finalise your calling file & track 'donors converted'



- Now you've created an optimised conversion list. Easy! Follow your usual process to finalise your calls, emails or mail and run the campaign! Once the campaign is live, track results in your Dataro App account.

Don't forget to log in to your Dataro App to get automatic campaign results reporting



The screenshot shows the Dataro App interface for a campaign titled '2021 Convert to RG'. The page includes a sidebar with navigation icons, a main content area with an overview of campaign metrics, and a right-hand sidebar with useful links. The campaign period is from 1 Jan 2021 to 31 Dec 2021, with the last update on 20 Dec 2021. The overview section displays six key metrics: Number in Campaign (6,000), Contact Rate (45.07%), Convert Rate (11.06%), Number Converted (299), Net Return (101,424), and ROI (250%).

Overview		
Number in Campaign	Contact Rate	Convert Rate
6,000	45.07%	11.06%
Number Converted	Net Return	ROI
299	101,424	250%

Keep reading for more tips and tricks to run better retention programs



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Repeat! We want to build a reliable system



- Successful conversion to RG programs don't happen overnight. You need to plan a consistent outreach strategy and track results each time. We recommend at least a quarterly outreach program. Remember, Dataro's predictions update every single week, so you will always have new people to convert to Regular Giving!

Use Dataro Fundraising Intelligence to track your conversions month on month or year on year!

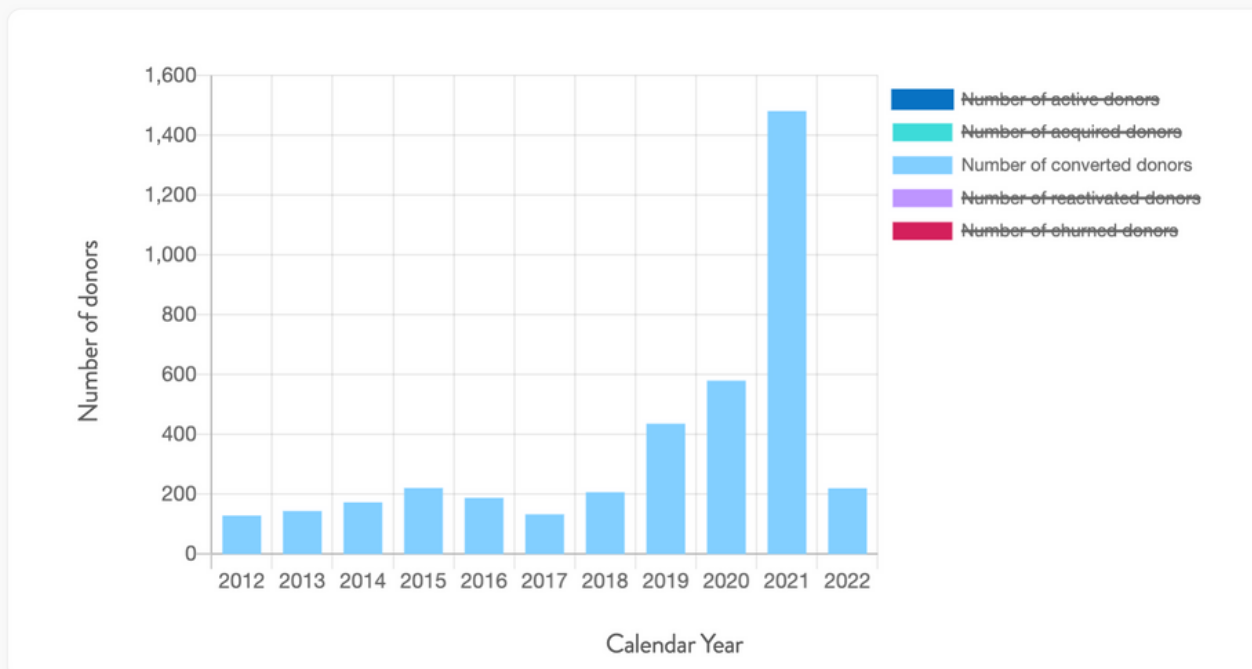


Donor flows

Last updated: 1 hour ago

Download results

Description & Tips



Tips & Tricks



- Once you've built your initial query, finding the best conversion prospects can be done at the click of a button! Run the query every month or quarter to find the best prospects for conversion.
- Try different tactics. Our customers have had the best success with telemarketing strategies - calling donors and asking for a regular commitment. But you should experiment with email, SMS and mail as well, or even try a couple in combination, like a warm up email or SMS followed by a call.
- Add an RG ask in your direct mail appeals, but ONLY for the donors with a good chance of saying yes. By targeting your RG ask to the right people, you increase the chances of a successful response.
- Track your results! The best Convert to RG programs improve over time, as customers figure out the tactics that work best for them. A great idea is to follow every appeal with a targeted Convert to RG ask.
- Log call outcomes in your CRM! Your call centre should be reporting all outcomes for you so you can effectively measure performance and improve over time. [Here's how we suggest storing the data.](#)



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