



# Regular Giving Churn Playbook

This playbook will help you use Dataro to reduce attrition in your regular/monthly giving program.



Smarter Fundraising for a Better World

# The Engage & Retain Program (i.e. churn prevention calls)



You put a lot of effort and often a lot of money into acquiring new regular givers. But what are you doing to make sure you retain as many as possible? With Dataro, you can run a whole new form of proactive retention program. We call it Engage & Retain. Here's how it works:

- 1** Predict: Use Dataro to predict which regular givers are the most 'at risk' of churning each month
- 2** Engage: Engage with at risk donors each month via a rolling 'thank you' call campaign & other methods
- 3** Measure & Repeat: Track campaign results, adjust call volumes, and increase retention



# 1

## Select your optimal churn campaign list size



- Login to the [Dataro App](#) and go to the homepage to 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 churn campaign, rather than monthly, just multiply the suggested size by three.

### Campaign Size Suggestions

[How do we create these suggestions?](#)

#### DM Appeal

16,000 Total Appeal Volume

[Learn more about DM Appeals](#)



#### DM Appeal >\$500

1,600 Total Appeal Volume

[Learn more about DM Appeals](#)



#### DM 24M Lapsed

800 Total Appeal Volume

[Learn more about DM Appeals](#)



#### RG Churn

Contact 500 RG Donors per month

[Learn more about RG Churn Campaigns](#)



#### RG Upgrade

Contact 300 RG Donors per month

[Learn more about RG Upgrade Campaigns](#)



#### RG Reactivation

Contact 250 Lapsed RG Donors per month

[Learn more about RG Reactivation Campaigns](#)



Recommended campaign size



[How to build a campaign list using Dataro Ranks and Scores in Blackbaud CRM](#)



## 2 Add the regular givers most 'at risk' of churning



- Using the 'Dataro RG Churn 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  $\leq 500$

Select desired list size using  
the 'RG Churn Rank'.



Dataro RG Churn 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 call



- There are certain exclusions you should apply to your RG Churn calling programs. We have a list of them [here](#). They include: regular givers flagged as 'inactive', donors with a 'do not phone', anyone who you called in the last 3 months, and anyone who only signed up in the last 3 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 churn).

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



Dataro RG Churn Rank

This value ▾

Less than or equal to ▾

1,000

Apply Clear Cancel

Example shows query in RE NXT



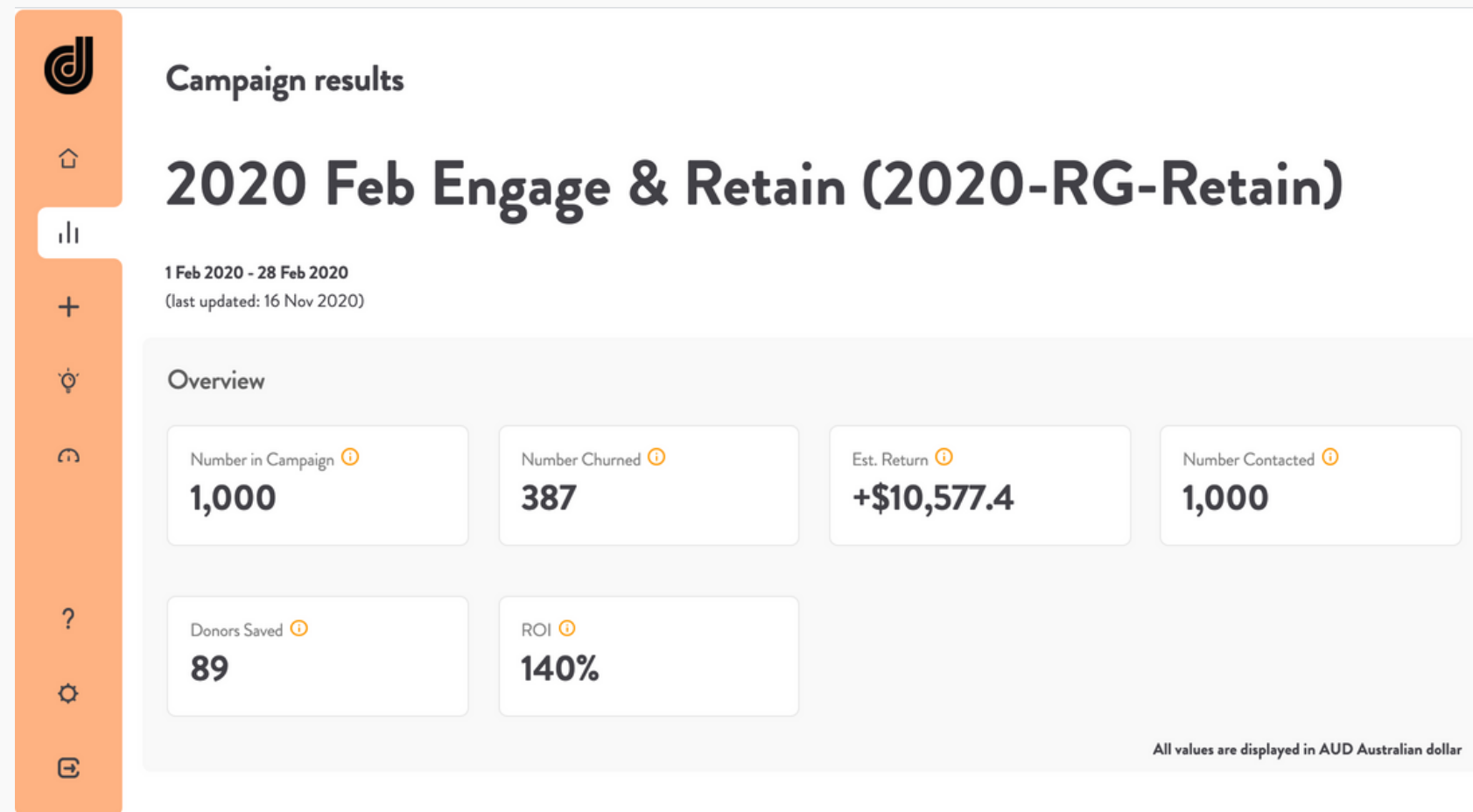
# 7

## Finalise your calling file & track 'donors saved'



- Now you've created an optimised churn list to increase retention. Easy! Follow your usual process to finalise your calling file and send it to the call centre. 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



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



# Tips & Tricks: Scripting



- You and your call centre are best placed to decide messaging, but here's what we know has worked!
  - Simple 'thank you' messages - make it clear you're not asking for money
  - Acknowledgement of contribution, tenure, etc
  - Connection to cause + opportunity to give feedback
  - Recent wins and upcoming needs
  - NO financial ask
- Remember, you're calling your most at risk donors so the team should be ready for a save call. But we've found most people are actually grateful to receive the call and there are very few cancellations.
- Think of this as an opportunity to save high risk donors and not a risk of cancellation. If you do nothing, the data says they will likely cancel!





# More Tips & Tricks



- Some regular givers with high churn ranks may not have phone numbers. But that doesn't mean there's nothing you can do! Try sending SMS or email campaigns to those donors you can't call.
- Want a more comprehensive retention journey? Add a short email or email + SMS sequence to your 'Engage & Retain' strategy, to increase touch points with the donor and maximise retention opportunities.
- Cross-reference your RG Upgrade calls against your Churn scores. If a donor is more than 50% likely to churn, consider removing them from your Upgrade calling program that month.
- 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.](#)
- Check out the [Dataro Knowledge Base](#) for more.



**dataro**

dataro.io

chris@dataro.io

