



# Regular Giving Reactivation Playbook

This playbook will help you use Dataro to identify the lapsed regular givers most likely to reactivate their gifts.



Smarter Fundraising for a Better World

# Replacing your 'one-size-fits-all' reactivation approach



Most nonprofits with regular giving reactivation programs use simple rules to select which lapsed regular givers will be contacted for a reactivation. For example, all lapsed regular givers might receive a reactivation call 6 months after their final gift. Sound familiar?

With Dataro, you can replace this process with a much more effective approach that selects the regular givers who are the most likely to reactivate at that point in time. Using this approach, we can aim for higher conversion rates and lower fundraising costs, leading to more reactivated regular givers and a better ROI.

This Playbook tells you how to implement this new approach.



# 1 Select your optimal reactivation 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 best result.
- If you're planning a quarterly reactivation campaign, rather than monthly, just multiply the suggested size by three.

## Campaign Size Suggestions

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

<b>DM Appeal</b> 16,000 Total Appeal Volume <a href="#">Learn more about DM Appeals</a>	<b>DM Appeal &gt;\$500</b> 1,600 Total Appeal Volume <a href="#">Learn more about DM Appeals</a>	<b>DM 24M Lapsed</b> 800 Total Appeal Volume <a href="#">Learn more about DM Appeals</a>
<b>RG Churn</b> Contact 500 RG Donors per month <a href="#">Learn more about RG Churn Campaigns</a>	<b>RG Upgrade</b> Contact 300 RG Donors per month <a href="#">Learn more about RG Upgrade Campaigns</a>	<b>RG Reactivation</b> Contact 250 Lapsed RG Donors per month <a href="#">Learn more about RG Reactivation Campaigns</a>

Recommended campaign size

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



## 2 Add the regular givers most likely to reactivate



- Using the 'Dataro RG Reactivation 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 250, select all donors with a rank  $\leq 250$

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



Dataro RG Reactivation Rank

This value ▾

Less than or equal to ▾

250

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 reactivation calling programs. We have a list of them [here](#). They include: regular givers flagged with a 'do not phone', anyone who you called in the last 3 months, and anyone who gave less than 3 gifts when they were active.

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 250 to the top 500 ranked donors (i.e. the 500 most likely to reactivate).

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



Example shows query in RE NXT



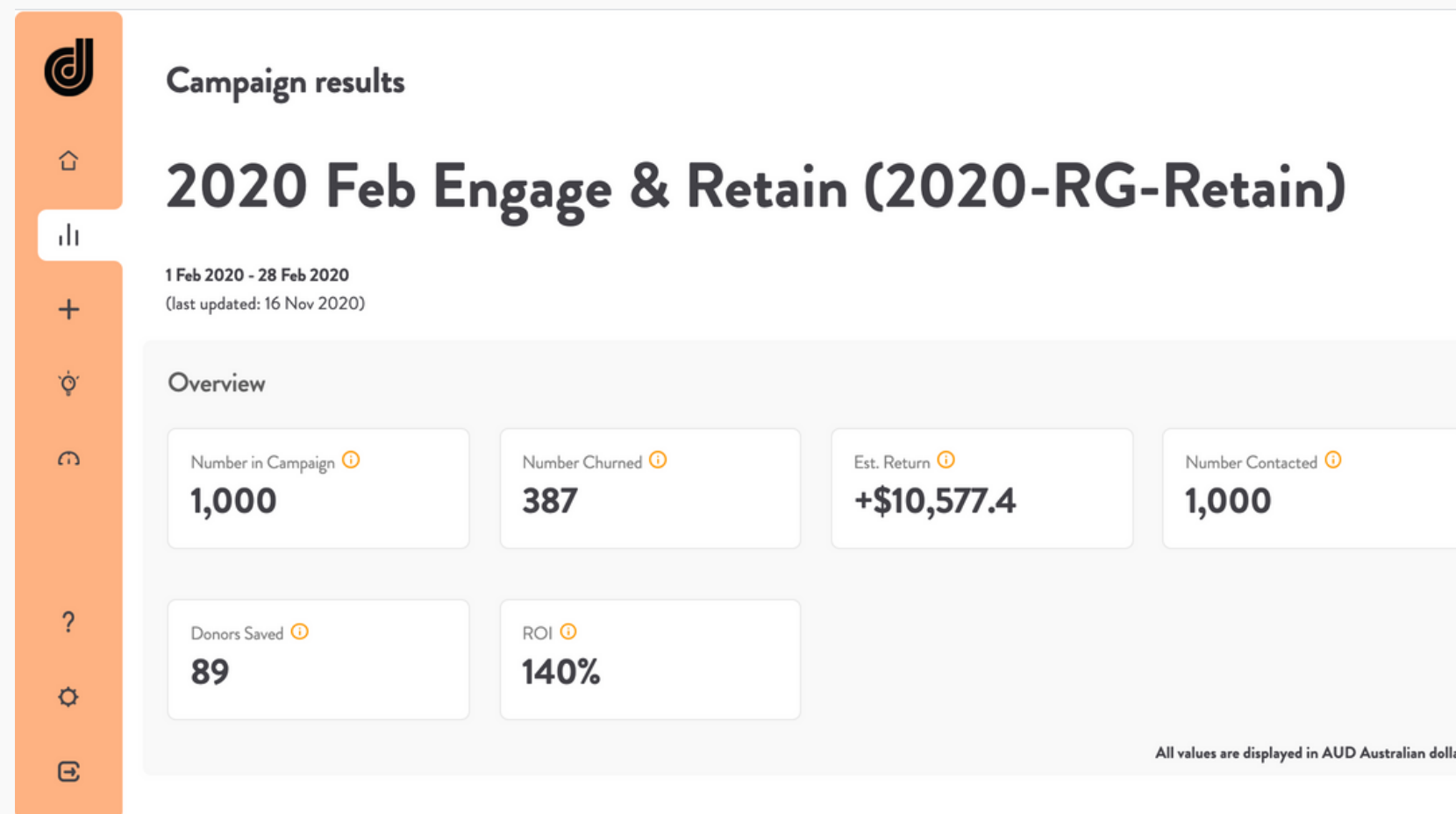
# 7

## Finalise your calling file & track reactivations



- Now you've created an optimised reactivation list. 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 reactivation programs



# Tips & Tricks - Reactivations



- Dataro allows you to run more targeted reactivation campaigns. Have you considered a higher frequency, lower volume strategy. Check the Dataro app regularly to get the suggested campaign size each month!
- Which donors are worth reactivating? We suggest having some criteria around giving history to qualify supporters for reactivation calls. Our standard suggestion is at least 3 gifts made when they were active.
- 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](#) if you want to access automatic results reporting in the Dataro App.
- Check out the [Dataro Knowledge Base](#) for more.





**dataro**

dataro.io

chris@dataro.io

