Regular Giving Upgrade Playbook

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

Smarter Fundraising for a Better World

Replacing your 'one-size-fits-all' donor journey for upgrades

Most nonprofits with regular giving programs use simple rules to select which regular givers will be contacted for an upgrade in any given month or year. For example, all new regular givers might receive an upgrade call 9 months after their first gift. Sound familiar?

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

This Playbook tells you how to implement this new approach.

1 Select your optimal reactivation campaign list size

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- Login to the <u>Dataro App</u> 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 upgrade 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 likely to upgrade

- Using the 'Dataro RG Upgrade 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 <=300

Dataro RG Upgrade Rank ⊘ ✕

This value ⬍

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

Less than or equal to ⬍

300

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 upgrade calling programs. We have a list of them <u>here</u>. They include: regular givers flagged with a 'do not phone', anyone who you called in the last 3 months, and anyone who has a Dataro RG Churn Score of greater than 0.5.

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 300 to the top 600 ranked donors (i.e. the 600 most likely to upgrade).

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

Dataro RG Upgrade Rank

This value

Less than or equal to

600

Apply   Clear   Cancel
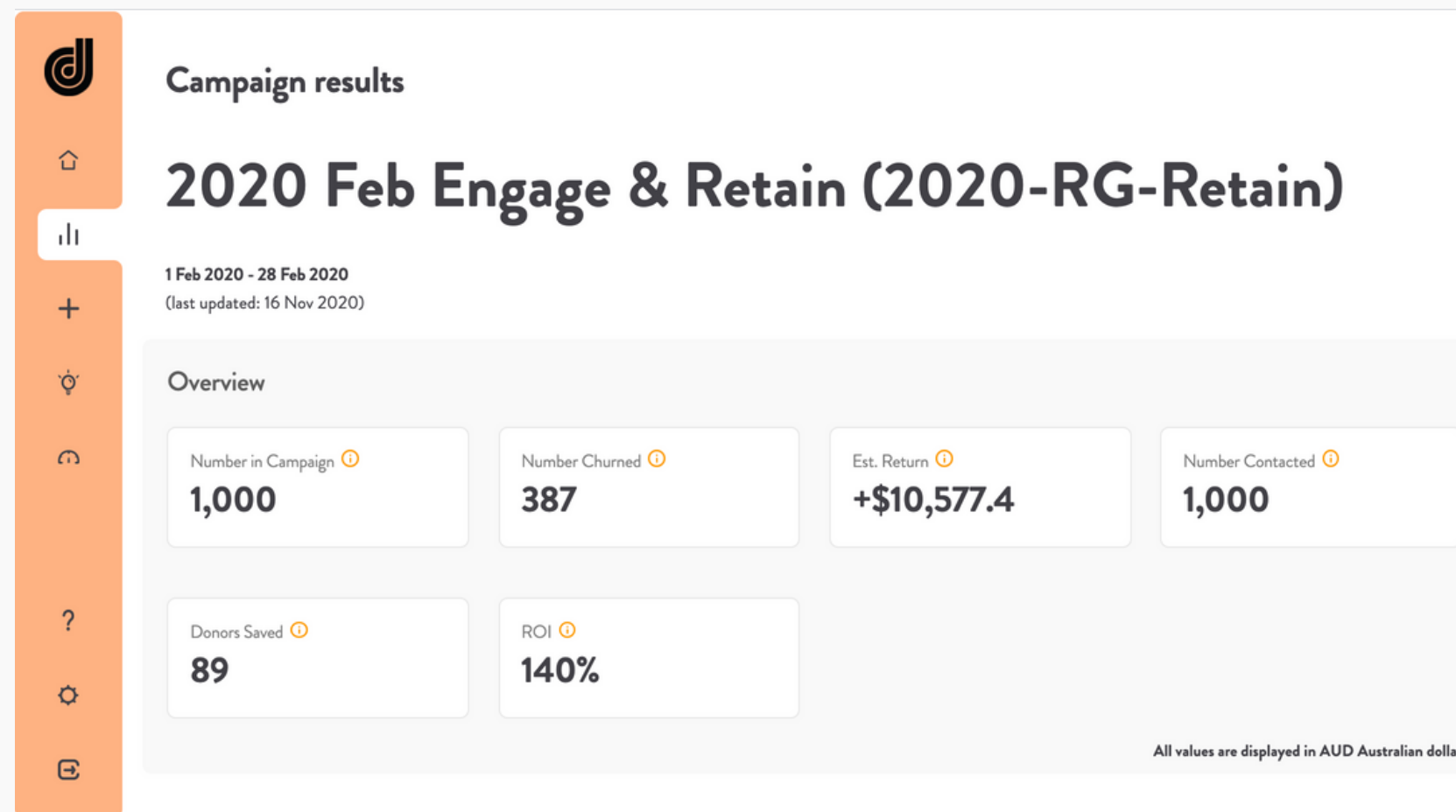
Example shows query in RE NXT

7 Finalise your calling file & track upgrades

- Now you've created an optimised upgrade 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

Campaign results

2020 Feb Engage & Retain (2020-RG-Retain)

1 Feb 2020 - 28 Feb 2020
(last updated: 16 Nov 2020)

Overview

Number in Campaign	Number Churned	Est. Return	Number Contacted
1,000	387	+$10,577.4	1,000

Donors Saved	ROI
89	140%

All values are displayed in AUD Australian dollar

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

Tips & Tricks - Upgrades

- Dataro allows you to run more targeted upgrade 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 upgrading? We suggest having some criteria around a donor's likelihood to churn, such as not upgrading donors with a Dataro RG Churn Score greater than 0.5 as a larger gift may increase their chance of cancelling even further.

- 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.

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