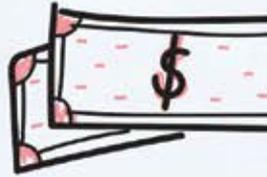


BETTER NOW



DONATE

10 STEPS

TO DESIGN A SUCCESSFUL P2P

FUNDRAISER STEWARDSHIP JOURNEY

FUNDRAISE



NG

Step 1

WRITE DOWN YOUR GOALS AND SUBGOALS

In other words, figure out what success would be for you. Often your overall goals are a mix of financial and qualitative goals. Most often the goals we work with are variations on the following four goals:

- **Make sure fundraisers feel they got the support they needed**
- **Maximise the likelihood of repeat fundraising**
- **Maximise the amount fundraised overall**
- **Maximise the number of leads for new recurrent donors**

In our experience, the more specific you get with your goals, the better. E.g. Instead of “increase the average fundraised per fundraiser” try “increase the average per fundraising page from £500 to £600”. One error we originally found ourselves making, when working with averages, was not defining which segments have priority. For example, maybe increasing performance of low-performing fundraisers something is more important than just moving the overall average.

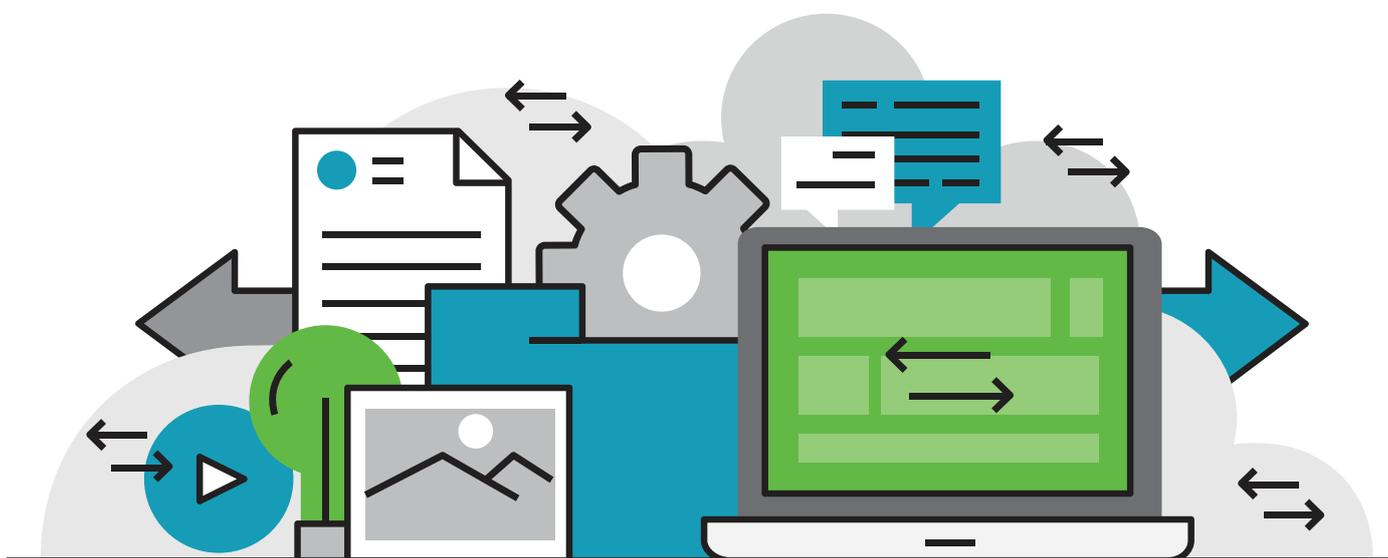


Step 2

ASSESS YOUR DATA

For the many of the first journeys we made, this was a step came that much later in the process. Now though, we find that having our data constraints set clearly at the very beginning not only saves us time, but that these constraints also help us in our creative work.

After you have made a list of all the available data, see how this fits with your goals - are there any obvious gaps? If that is the case, you might want to spend some time gathering extra data.



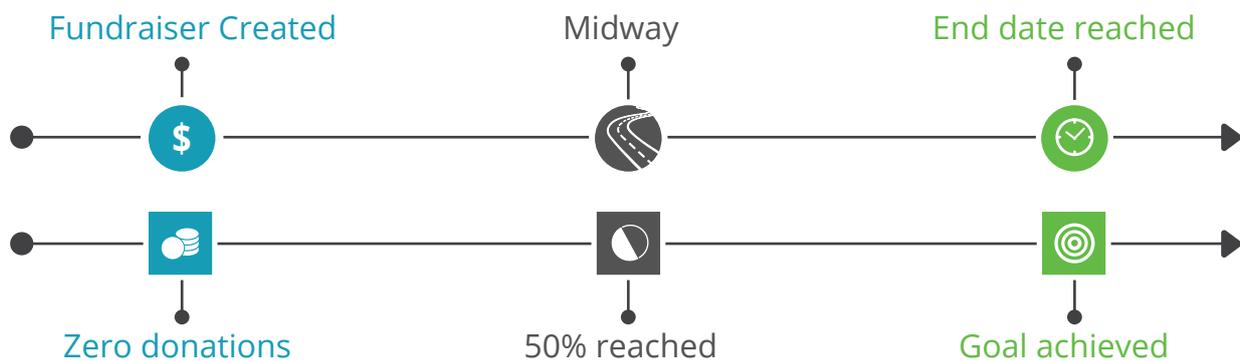
Some questions that will help you with this step:

- **What data do you I access to?**
- **What contact and other personal data do I have access to?**
- **What behavioural data do I have access to? (e.g. Donations received, Profile Picture Uploaded, Milestone achieved, End date Reached, Fundraising Page Created, Team Created)**
- **What format does the data come in?**
- **When do I get access to the data? Is it real time or delayed?**
- **Do I have data to measure success? (Also see step 6)**

Step 3

FIND POSSIBLE CONTACT POINTS DURING THE FUNDRAISING JOURNEY

Most of our fundraiser journeys move along two connected, but still independent, timelines. What makes fundraiser stewardship journeys different from donor supporter journeys is that they are A) constrained by time and B) the recipient generally has a goal they want to achieve.



This step is about identifying contact points on the above two timelines, by finding where you can provide value to the fundraiser when communicating with them.

Some additional complexities that we sometimes encounter is that the above needs to take into account changes such as the end date being postponed or the goal being raised (or lowered!). If you have certain incentives or milestones that are already naturally built into the campaign or event, then these might be key points on the timeline.

The best journeys we make are the ones that work on both of the above timelines, but this does require good behavioural data, which might be difficult to come by, depending on the technical solutions you have in place.

Some (slightly obvious) examples of good contact points:

- **Fundraiser created: High energy point, and the need for information is high**
- **Goal achieved: Anyone who achieves their goal, whenever they reach it, needs a big congratulations!**
- **Quarter in, no donations: Clearly an indications that this person either lost initiative, forgot about it, didn't have enough time, or needs help. Either way, this is a perfect time for you to re-engage.**

Step 4

ADD SPECIFIC MESSAGES ON THIS JOURNEY (POST-IT TIME!)

Now for the fun part!
(if you like Post-it Notes, that is).

Find a wall that you can occupy for some time, as you might want to leave it and come back and reevaluate with a fresh outlook a few days later. Find Post-It notes in various colours, tape, scissors - you name it.

Map out the above contact points on the journey. After you have done this, this is the time to get more specific about the contact points by adding messages.

For each of the contact points you identified above, you should now write a headline (you might want to use larger than standard post-it's for this).

In addition, add the channel (email, SMS, phone) (tip: different colored post-it's!) and maybe the CTA of the message if its not obvious from the headline. Also note if variations may be needed depending on how successful a fundraiser is, for example.



Step 5

WRITE A VERY SHORT OUTLINE OF EACH EMAIL, AND EVALUATE THE JOURNEY

The next step is to add a little more detail to each message. At this point, you might want to start using something other than Post-It notes! An outline might reads something like this;

“Email: Big thank you, 3 tips and tricks, quote from celebrity ambassador, CTA to share page on Facebook”

or

“Call: Thank you! why did you start the fundraiser? Any questions?”.

One way to think of these is as headlines to each paragraph in your message.

This will give an improved overview. We know from our own experience that, just by writing out the outline, we will end up back at step 4, and often end up removing emails that we can now see are repetitive or unnecessary. We always try to keep the volume of content low, as what is often overlooked is that setting up a stewardship journey is not just the initial investment, you will also have to maintain, update, test and monitor it too. So a lot of content has a very real maintenance cost.

This is one of our key pieces of advice: keep the stewardship journey as light as possible. Don't be afraid to remove parts that have no positive

effect. Even if you set up almost 100% automation, maintenance costs can be substantial.

Now, try to go over all the various paths of the journey. Go through each trigger point and identify any issues. Are there any black spots? Are there any paths that might lead to over-communication?

Practically, we often do this by plotting the paths out with pieces of string. We start with the top fundraisers who follow the 'ideal path' through the journey and ending with those fundraisers who never get started and need additional motivation.



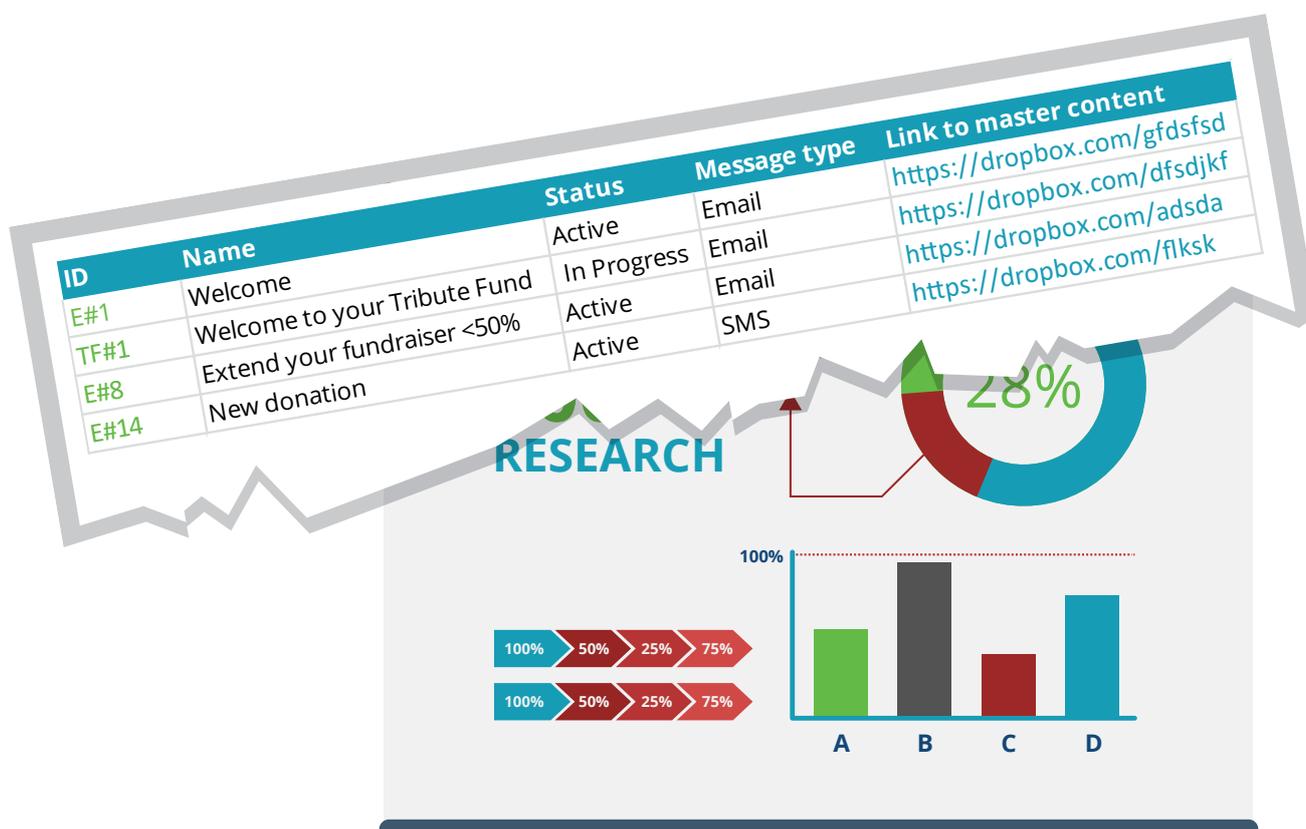
Step 6

DIGITALISE AND DEFINE SUCCESS FOR EACH PART OF THE JOURNEY

Post-It notes won't cut it anymore. You will need digital tools to work on this journey from here on in. First, visualize the Post-it diagram in a mock-up tool. We use Balsamiq MockUps, but any other tool like this will do. We do though strongly recommend against using PowerPoint or the like. Beside a visual representation of the journey, you will also need a spreadsheet, where each message gets a row. This spreadsheet can be used to keep track the implementation progress later. This will be a very important piece of documentation for your team after the journey is finished, and will be the document you use to keep track of edits, revisions and document names.

In the spreadsheet, add a column where you can enter your success criteria for each email. Start to think about how to measure success. We don't mean open and click rates, but actual conversion.

Did the participant actually take the action you wanted them to? Did they share, did they update a profile photo, did they themselves donate? You might need to go back to step 2, and assess if you have the data to do this. Of course, for some messages it isn't possible to quantify what success looks like, and that is okay.



Step 7

WRITE THE EMAILS/SMS/ PHONE SCRIPTS

Finally! You have arrived at what most people believe is the main part, and what new employees in BetterNow often jump to prematurely. The parts above, if prepared and structured, can be done over 2 days and with 2-6 hours of work. Surprisingly, the most time consuming part is often the assessment of your data.

Now you know your journey, you know your goals, and you know what success looks like for each message. You are now ready to write the copy. This of course involves proofreading, feedback etc. There is a good chance that you are way more experienced with this part than we are, so we won't try to teach you anything about copywriting and editing.

A note on authenticity: With emails, it is often tempting to automate everything. But we recommend leaving room for authenticity. Maybe leave room for a second welcome and thank you email, written for each person, by a real person. Or even phone calls if your budget allows. But make sure that the person fundraising knows that there are real people in your charity, and that you have seen and recognise them - this is incredibly important.



Step 8

IMPLEMENT IN YOUR MARKETING SOFTWARE

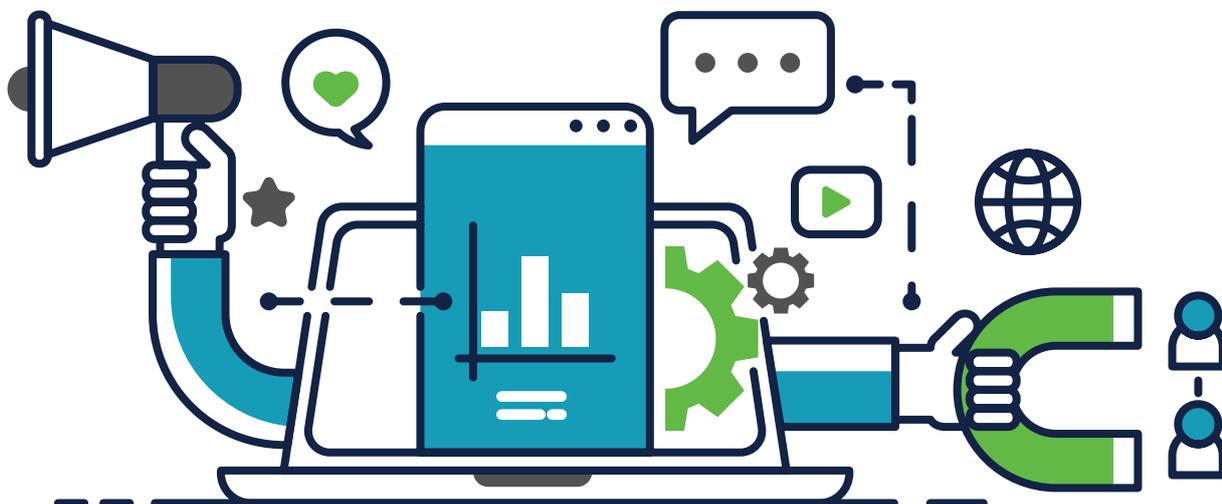
The implementation all comes down to what marketing automation tool you are using. No matter the solution, this can usually be broken down into these tasks.

- A Integrate data sources.**
- B Integrate marketing channels (email domains, phone numbers for SMS messages, etc.)**
- C Set-up e-mail layouts.**
- D Set-up triggers, campaigns, automation, and delays.**
- E Add copy, text and fields.**

If you have done this before, A)-C) might already be done - lucky you!

One caveat though. It is good to already know what tool you will be using in step 2. Some tools will limit your freedom and flexibility, and if you don't have these constraints in mind throughout the creative process, you might end up having to do quite a few alterations to your plan.

A note: Implementing marketing automation should not be done lightly. Since it is automated, and often involves a high volume of emails, there is potential for some truly horrific errors. You might want to delegate this part to a colleague who thinks in "if-this-then-that" statements and might even have some programming experience.



Some tools you might want to consider:

Mailchimp: Mailchimp is great for newsletters. Mailchimp has also improved their automated marketing product substantially. That said, advanced users might still feel it to be limiting. If you have you never done marketing automation, this might be a good tool to start out with.

Dotmailer: Suggested to us by consultants in this area who think highly of it. We don't have experience with it, but it comes with high recommendations.

Salesforce Marketing Cloud: Has benefits for those who already have a Salesforce CRM set-up, as you already have a lot of data available, but can be expensive.

Customer.io: Our own favourite solution. The possibilities are endless, and this is what we believe to be the best tool for marketing automation. It also integrates with Twilio and Urban Airship, allowing you to send in-app mobile notifications and SMS's. Downside: No template builder.

Apsis: We know of charities using this system, but have no experience using it ourselves.

Twilio: A great option for SMS messages. They even have a non-profit program with large discounts for [charities](#).

BetterNow: Hey wait! What!?! Yeah, we know, we aren't an email system. But when using BetterNow for this, we take care of all the technical parts here. All solutions come with pre-built, pre-tested journeys, you just have to re-write the e-mail texts - easy breezy! We even do the ongoing testing, evaluation and monitoring.

Our own set-up. Our own setup is geared towards handling these campaigns using mainly the data generated from the BetterNow solution, so it is not something that can be copied. But some of you might find inspiration in it anyway.

We send data using our own API/Webhook (that is open and available for our clients as well) to a service named Segment.com. From here we send it to Customer.io. In Customer.io we have created almost every campaign as event triggered campaigns, using the events generated on the BetterNow platform to trigger campaigns. We use the same event data to measure conversions, and we send opens/clicks and other tracking data back to Segment.com, where it enters our main database. We have also added a Slack and Trello integration to notify us internally of certain events, and we use Twilio for sending SMS's.

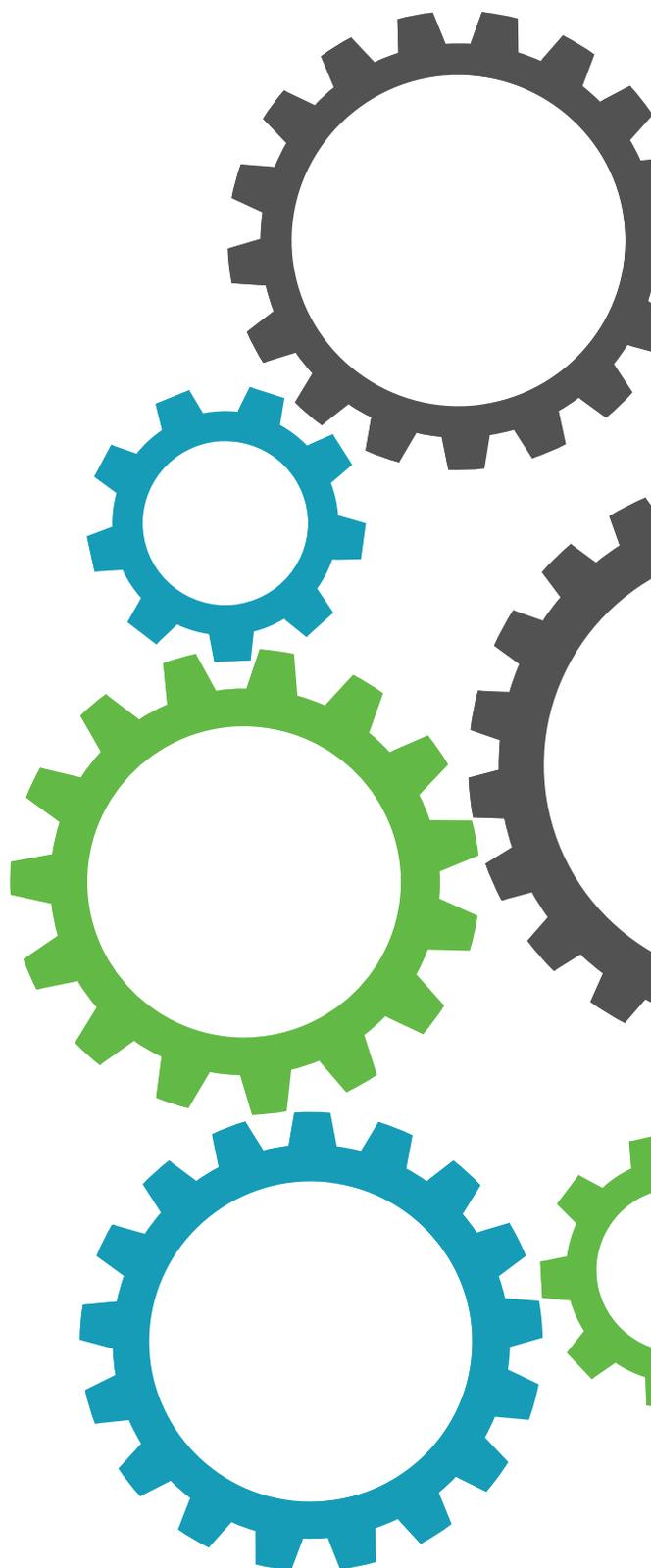
Step 9

TEST, TEST AND TEST

We can't stress this highly enough. The first version of your automated journey will have an error somewhere for sure.

The more complex your journey is, the higher the chance that you forgot some small condition or segmentation. Usually, we divide our testing into three phases.

- A Test each email for errors**
in merge fields and layout errors. This is the easy part. Your marketing automation tool will most likely have built-in tools for this.
- B End to end testing**
with test fundraisers. This can be difficult to achieve, but is often worth it. We have never not caught an error in this phase.
- C Activate all emails in 'draft mode'.**
This mode (if your software supports it) is where all messages are just drafted and you have to approve all messages before they are sent. This way, you can test with real life data before you turn the automation on completely. We recommend that as a minimum, you see every single message being triggered correctly at least once before turning on automation. We prefer to have it running like this for a minimum of a week, and with minimum of 10 drafts. If you do C) you could skip B) which can be helpful if you are on a tough deadline.



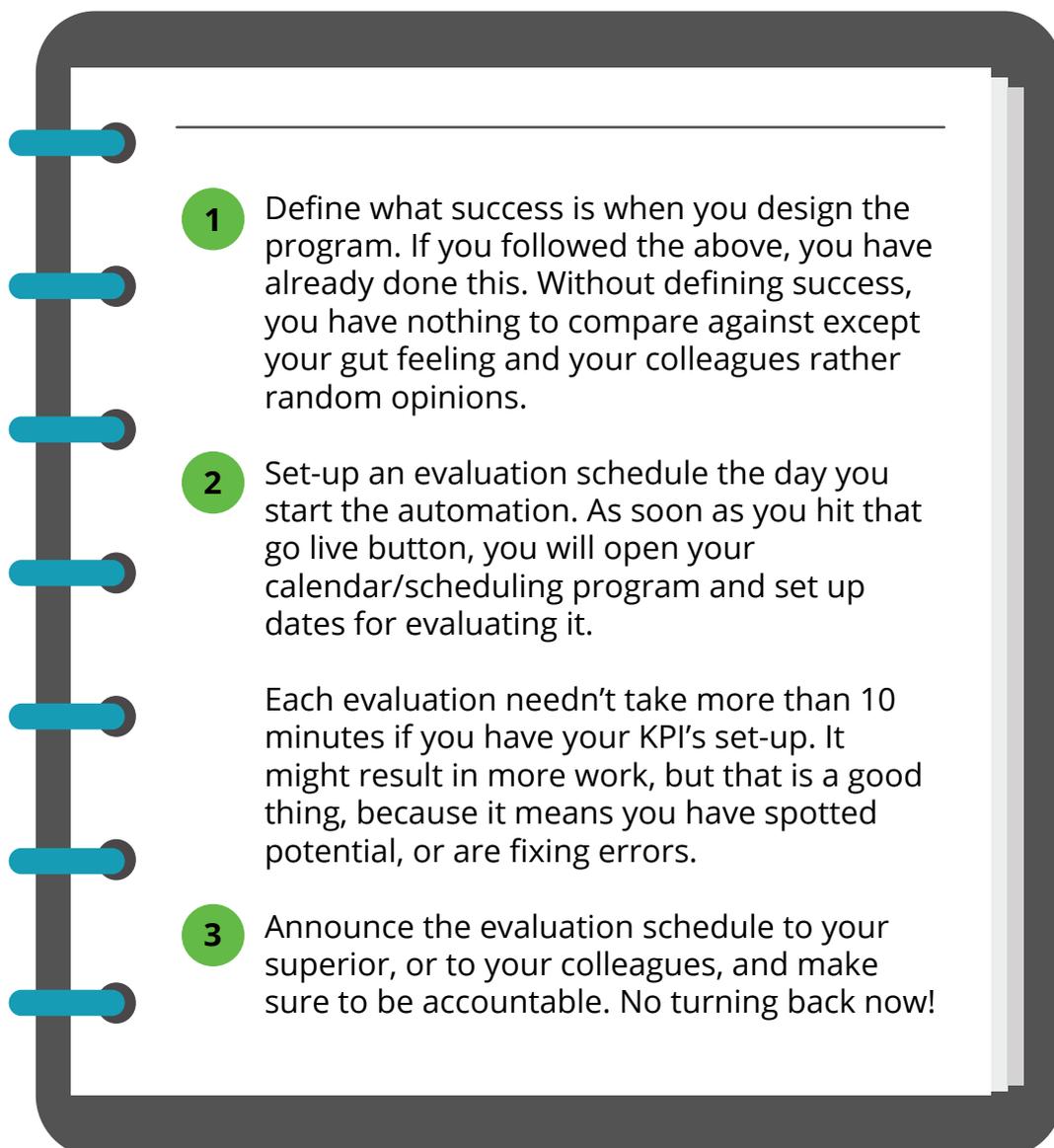
Step 10

MONITOR AND EVALUATE

Everyone agrees on the importance of monitoring and evaluating the performance of your stewardship journey, yet very few do it. We can tell you, we have had cases where we have doubled conversion rates by tweaking these journeys down the road, so it is worth it!

There are huge gains to be had, and it is almost sad to see so much potential for additional funds be lost, for lack of so little effort.

So, here is our advice on how to ensure you measure and optimise your journey.



- 1** Define what success is when you design the program. If you followed the above, you have already done this. Without defining success, you have nothing to compare against except your gut feeling and your colleagues rather random opinions.
- 2** Set-up an evaluation schedule the day you start the automation. As soon as you hit that go live button, you will open your calendar/scheduling program and set up dates for evaluating it.

Each evaluation needn't take more than 10 minutes if you have your KPI's set-up. It might result in more work, but that is a good thing, because it means you have spotted potential, or are fixing errors.
- 3** Announce the evaluation schedule to your superior, or to your colleagues, and make sure to be accountable. No turning back now!

We hope you enjoyed this little guide, and that you have learned a thing or two that you can take away to help you and your organisation make the world ever more generous!

We hope the above will be useful for anyone working with peer-to-peer fundraising, and that you will put them to good use. We also want to tell you a little bit more about BetterNow.

BetterNow does P2P fundraising, and a good fundraising stewardship journey is essential for the success of a good P2P campaign.

BetterNow provides white label solutions for P2P, event and community fundraising. We have dedicated solutions for tributes, funds, and many other campaign types. We want to supply amazing technology to charities at a fraction of what bespoke solutions cost. Our products are re-brandable and standardised, making it possible for you to get started without any set-up costs and no up-front investment. Our fees are comparable to many giving platforms.

How BetterNow does stewardship journeys

With BetterNow you can either;

- **Let us use the standard stewardship journey, with you as the sender (the cheap and easy option).**
- **Have our standard fundraiser journeys re-branded and re-written for you (the cheap option).**
- **Have us design a completely customised journey on top of our API implemented in our technical system by us (the best option).**
- **Or, you can use our API to design your own journey (the resource intensive option).**

There are benefits and downsides to all of those options of course, but, in all cases you will have the benefit of the many features for peer-to-peer, community and event fundraising that BetterNow has to offer.

BETTER NOW

Copenhagen office:

Danneskiold-Samsøes Allé 41
1434 Copenhagen K
Denmark
CVR: 34205566

London office:

The Dock London, Tobacco Quay,
Wapping Lane,
London E1W 2SF
United Kingdom

Phones:

UK: +44 (020) 3630 1210
DK: +45 77 34 08 86
SE: +46 (0)840-838 238
NO: +47 21 98 40

Email:

hello@betternow.org