

Increase Retention... by focusing on Acquisition Quality & Donor Feedback

DonorVoice for **DMAW**
July 19, 2023

(proprietary & confidential)

DonorVoice

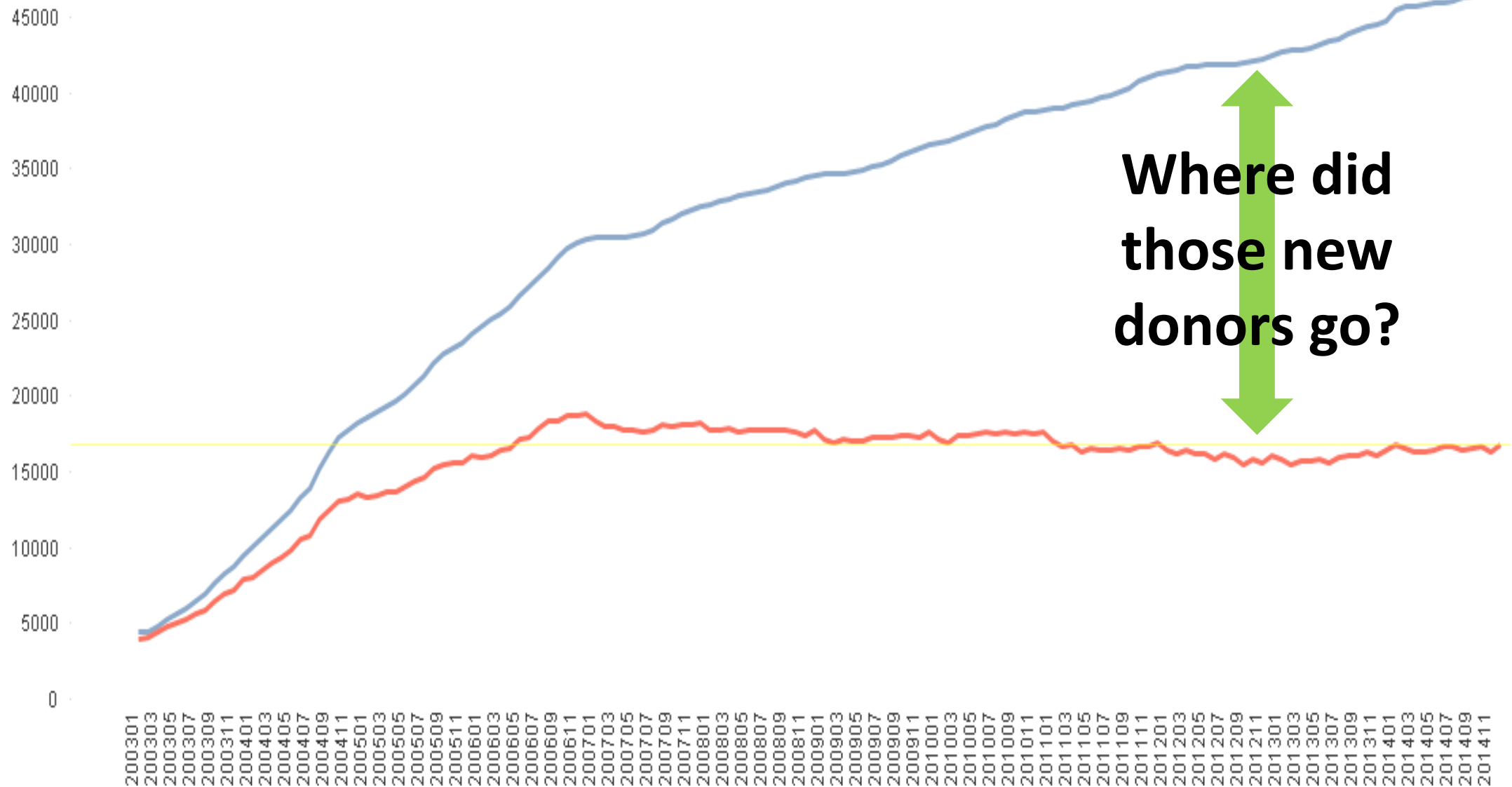
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DMAW

Direct Marketing Association of Washington

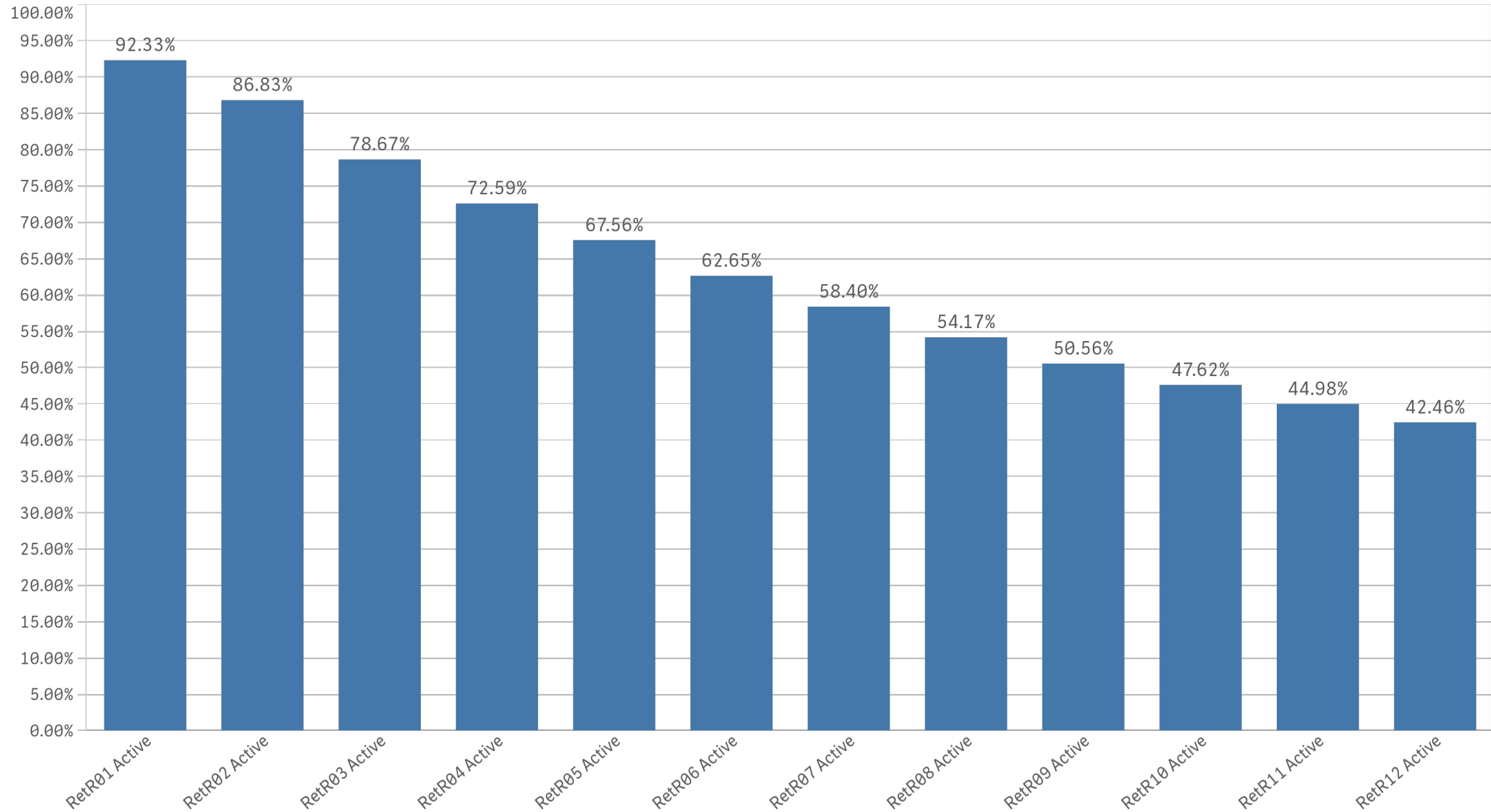


The Retention Problem

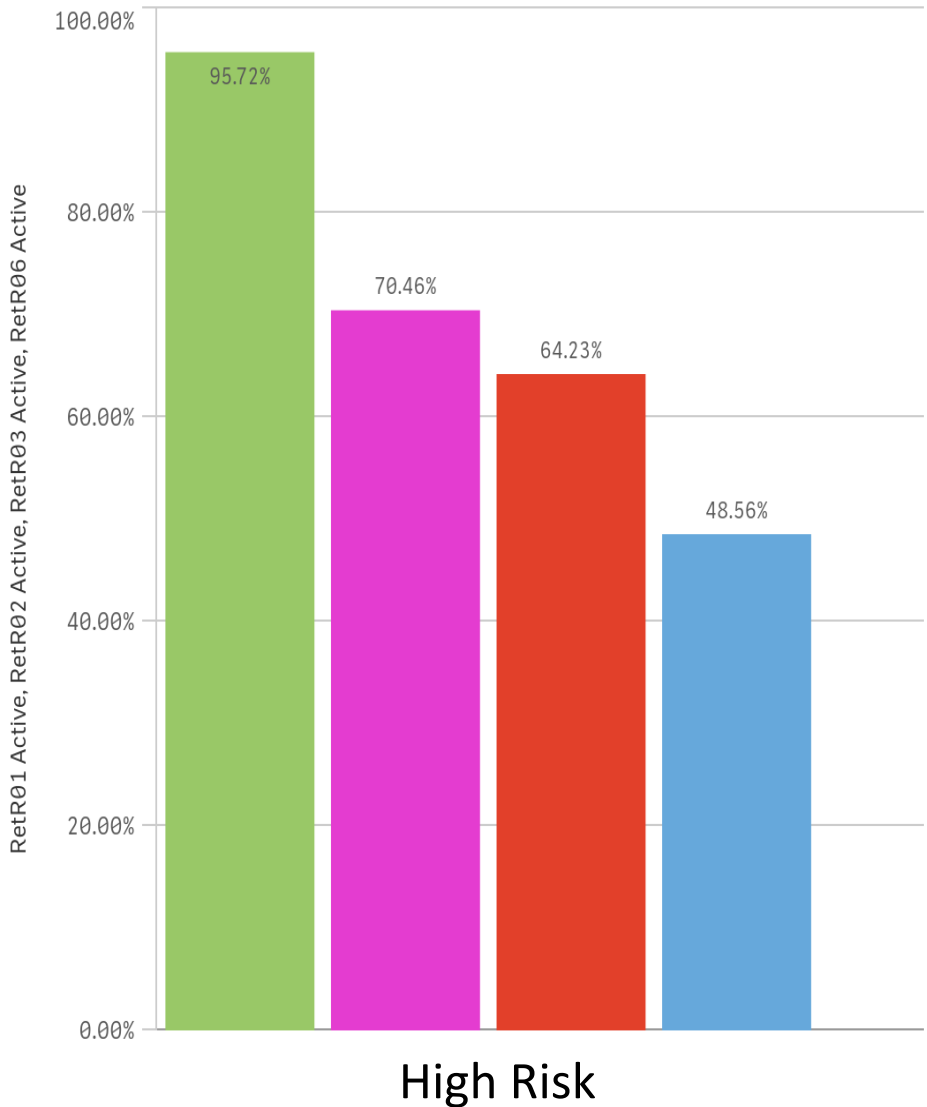


*Gross cumulative monthly donor signups vs. real active donors
European midsize charity*

Sustainer Retention by Month (sample)



Predicted Risk Actual Retention



- RetR01 Active
- RetR02 Active
- RetR03 Active
- RetR06 Active

High Risk



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Machine Learning

variable	value
fb_intentionstay	0,199
donorage	0,175
invite no issues	0,144
fb_needssatis_autonomy	0,136
fb_needssatis_relatedness	0,133
fb_needssatis_total	0,102
fb_needssatis_competence	0,087
contract_paymentmethod X	0,064
donor_phone_available	0,011
donor_email_available	0,009
contract_amount_initial	0,007
recruiting_organization_division	0,003
survey_gaveopentextcomment	0,002
invite issues	-0,013
profile_commitment	-0,031
fb_needssatis_imbalance	-0,067
contract_paymentmethod Y	-0,075
invite_clicks	-0,083
invite_opens	-0,137

Classic recruitment data

Survey process

Survey response

- Collect signup & survey data
- Correlate with retention
- Types of data:
 - Point-of-Sale (first-party) data
 - Process data (e.g., email response)
 - Zero-party data (from supporter)

Measure what Matters

Commitment

What if she is already more loyal to the charity than him?

Satisfaction

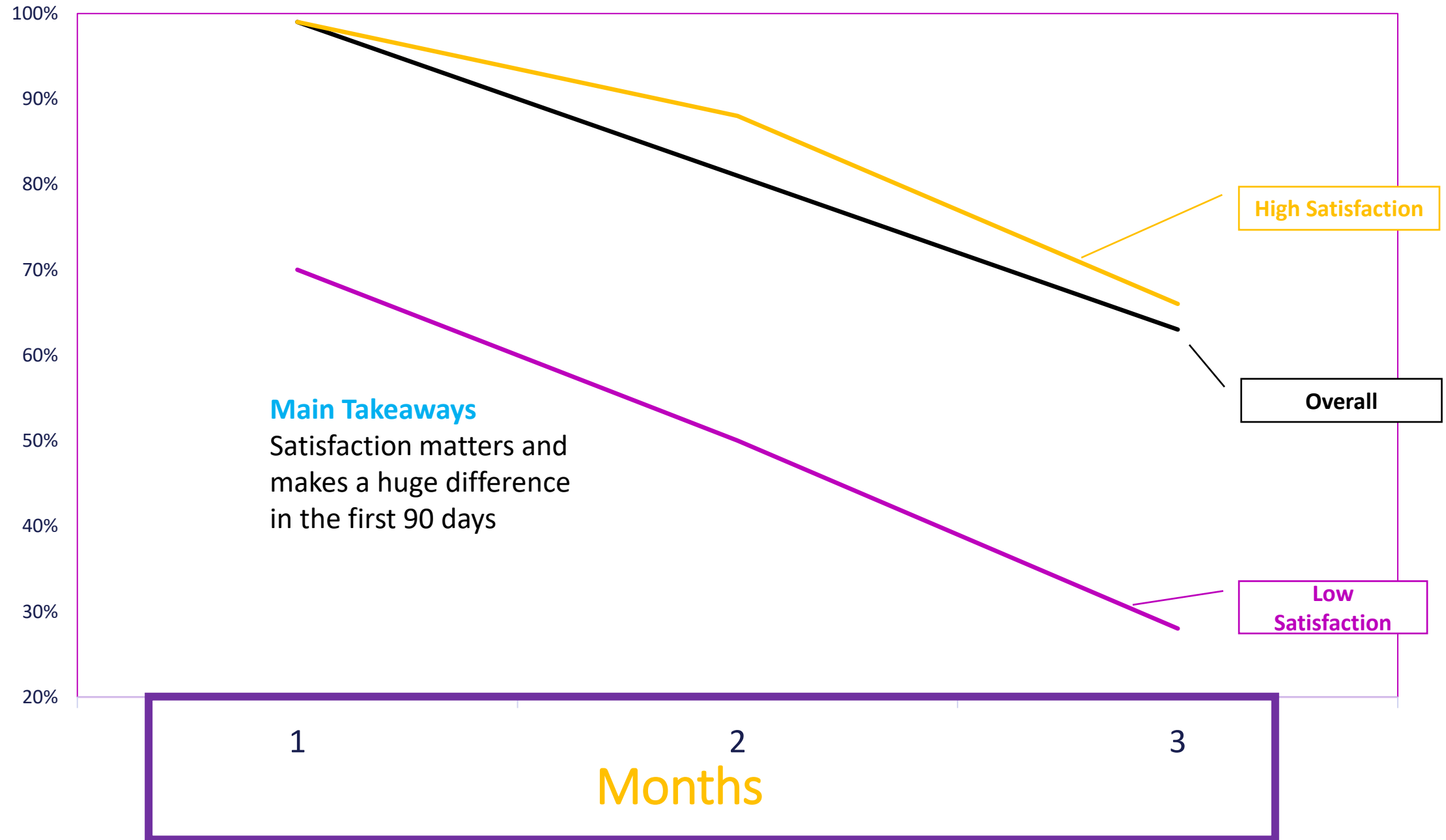
What if he has a really good experience and she has a bad one?

Identity

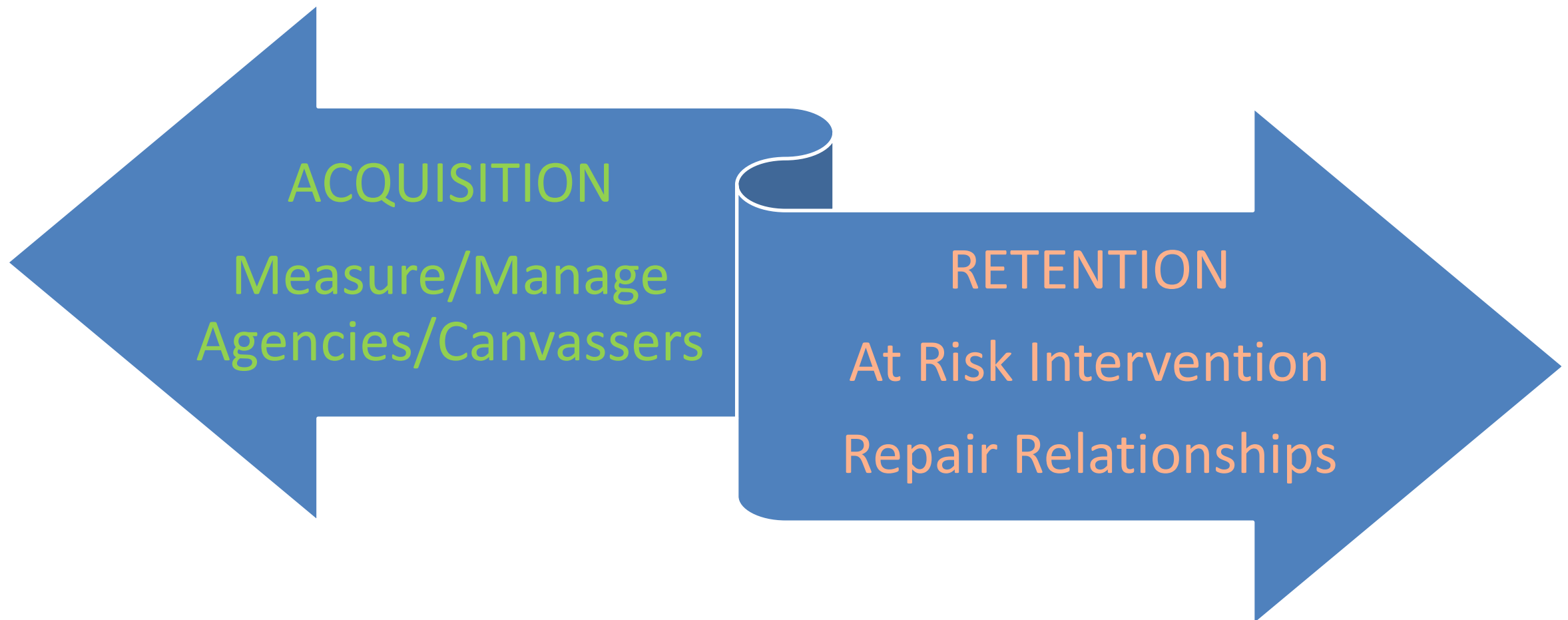
What if she has a personal, direct connection to the mission and he doesn't?



Satisfaction & Retention



Upstream / Downstream



Capturing relevant data at signup (Census)
AND via Survey afterwards (Sample)

Asking for Feedback (after signup)

Subject: How was your experience?

Dear Josh,

Thanks so much for speaking with our fundraiser, Jessica Arneson.

As one of our supporters, your opinion matters to us. We'd love to hear how your recent experience with our fundraiser was; whether it was good, bad or anything in-between.

Please join other kind supports and [click here](#) to take our 1 minute survey to provide your important feedback. You'll also have a chance to share any comments you wish.

Thank you,

Lauren Yuhas

Monthly Giving Manager

P.S. If you ever need any information or support, then please get in touch at 1-800-AMNESTY or email aimember@aiusa.org. We'd be happy to help in any way we can.

As a supporter, you make all the difference by helping us improve and ultimately, be more successful in our shared goal of campaigning for a world where human rights are enjoyed by all. If you'd rather not hear how you're helping, you can unsubscribe from all of our email communications by [clicking here](#).



Please tell us how true each statement is about your experience with our fundraiser.

	Not at all true	Not true	I'm not sure	True	Very true
The fundraiser was too pushy.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The fundraiser and I got along.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I felt I could make a positive difference.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The fundraiser respected the fact it was my decision.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The fundraiser was friendly.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I felt a sense of accomplishment after our interaction.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Which of the following best describes you?

- I will definitely continue my support.
- I will probably continue my support.
- I might continue my support.
- I probably won't continue my support.
- I definitely won't continue my support.

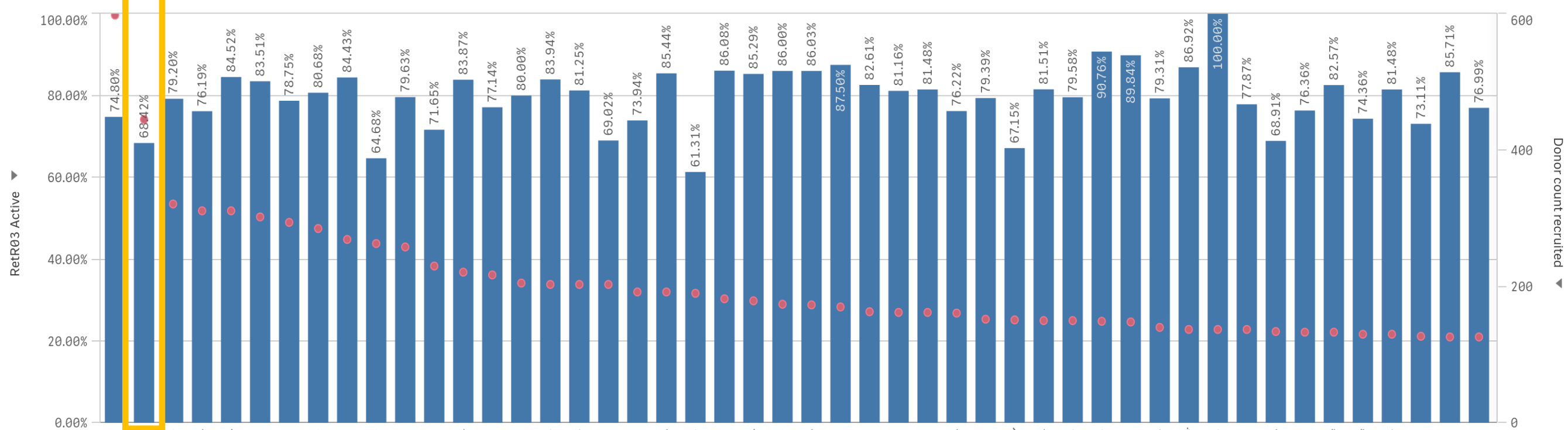
Is there anything else you'd like to share with us today?

MANAGING UPSTREAM (OR, “THE STORY OF A CANVASSER”)

Retention per Recruiter (too late)

Metrics combination by dimension

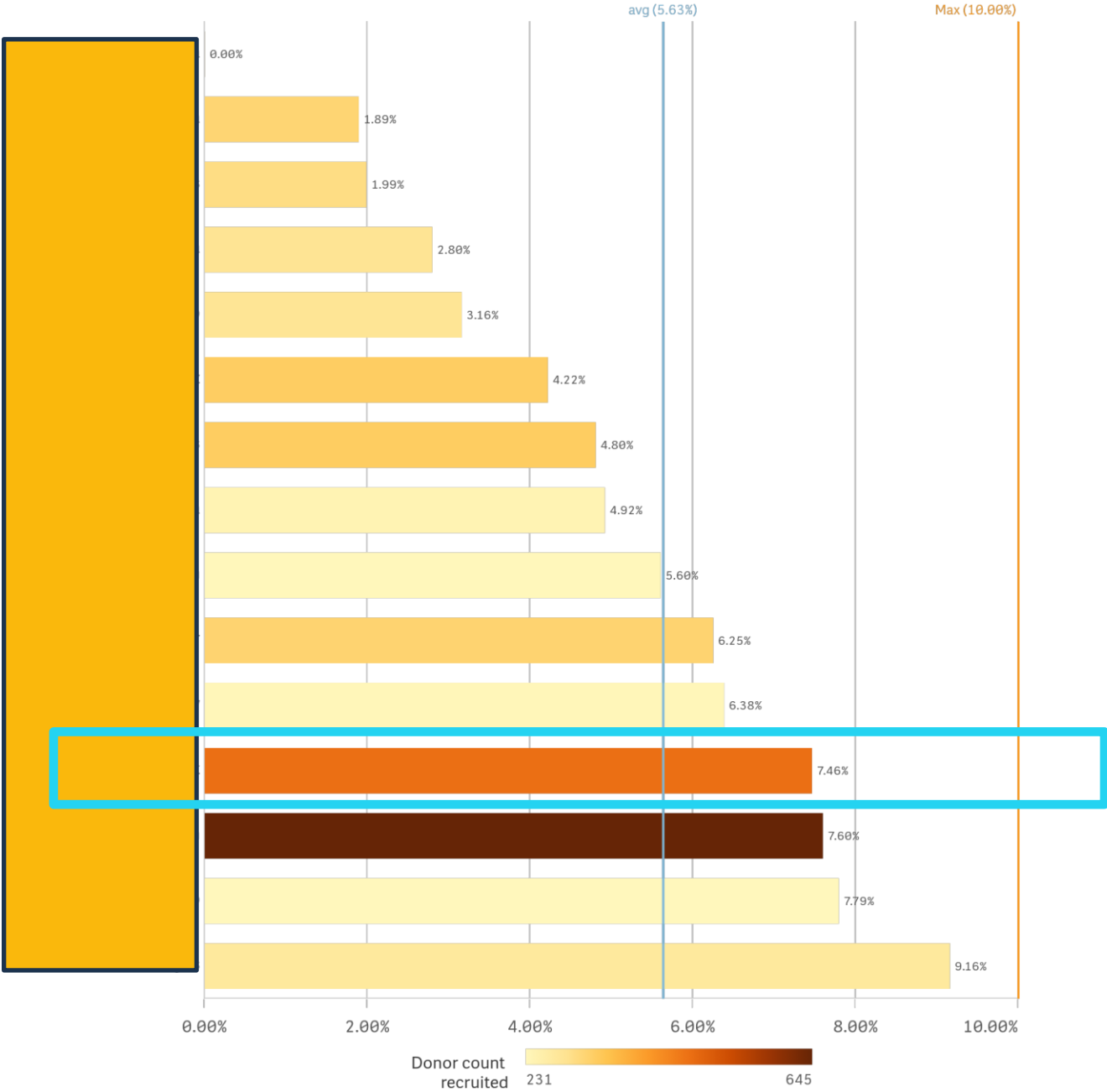
Total donors: 24,017



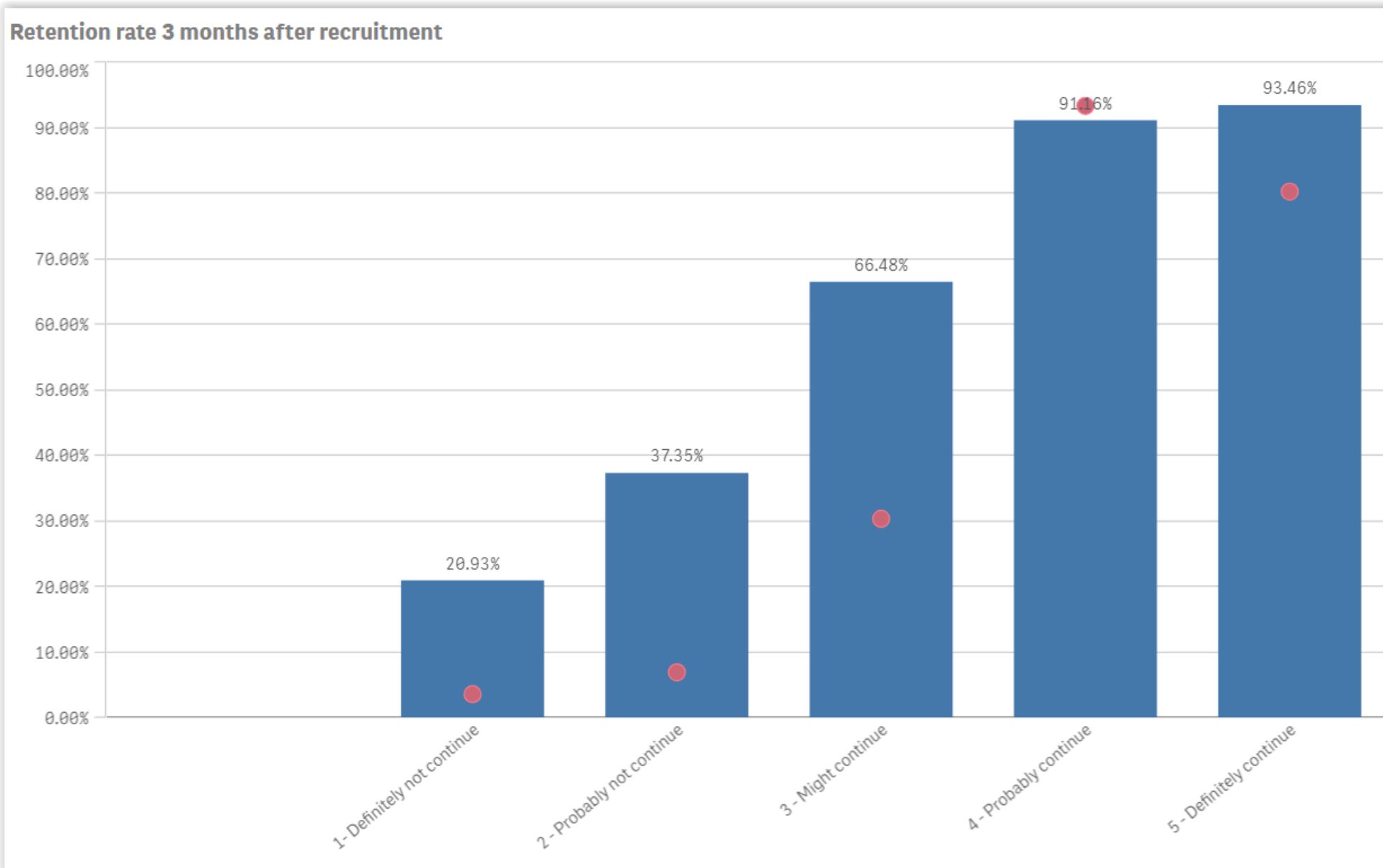
High-volume canvasser with Low Retention at Month 3 ("After the Fact")

Top Recruiters: High At Risk %

Donors at high risk of leaving
Limited to recruiters who recruited more than 231 donors.



Donor feedback: Intention to Stay

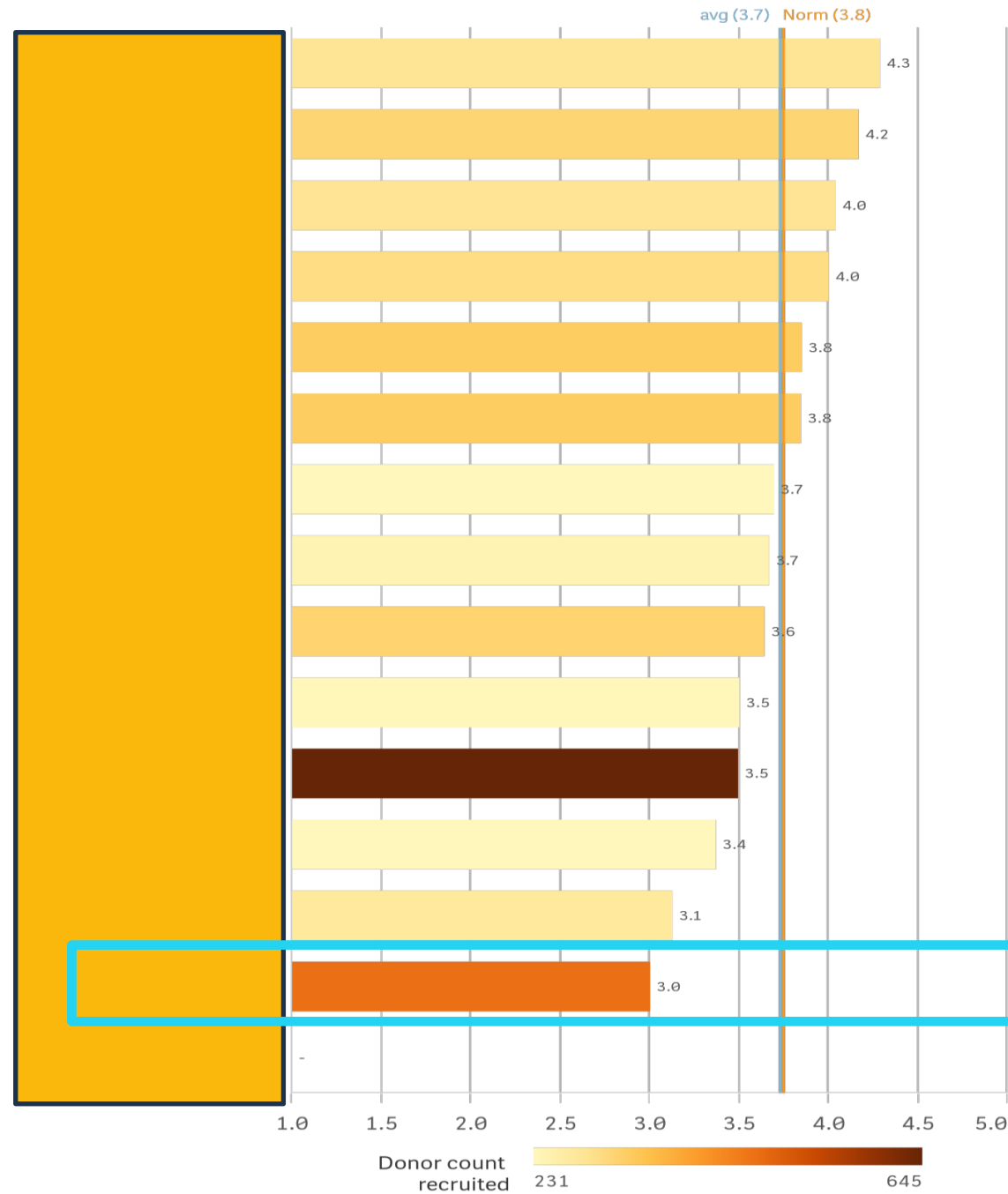


Sometimes people do what they say...

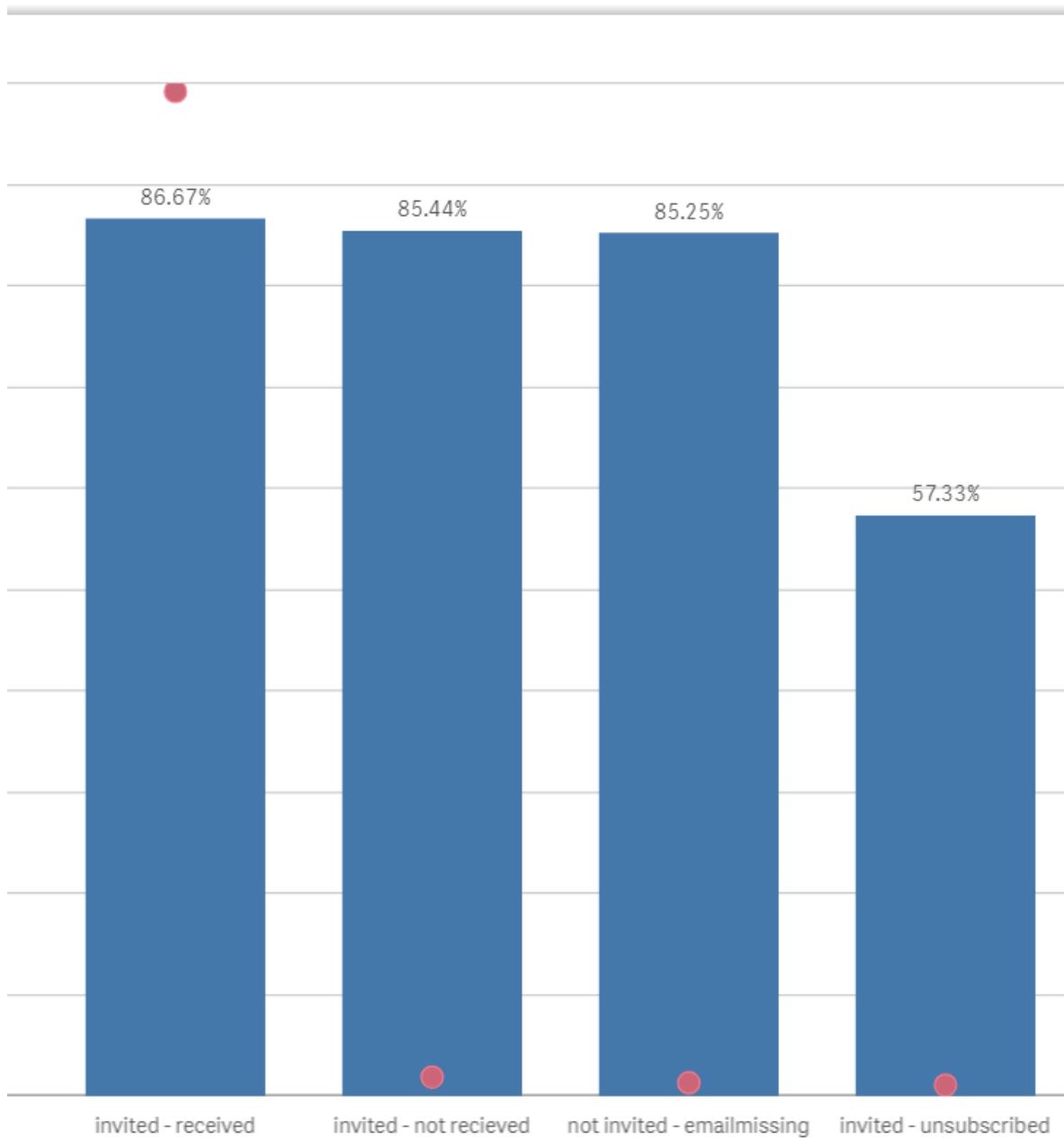
Top Recruiters: Intention to Stay

Intention to stay

Limited to recruiters who recruited more than 231 donors.



Bounces and unsubscribes



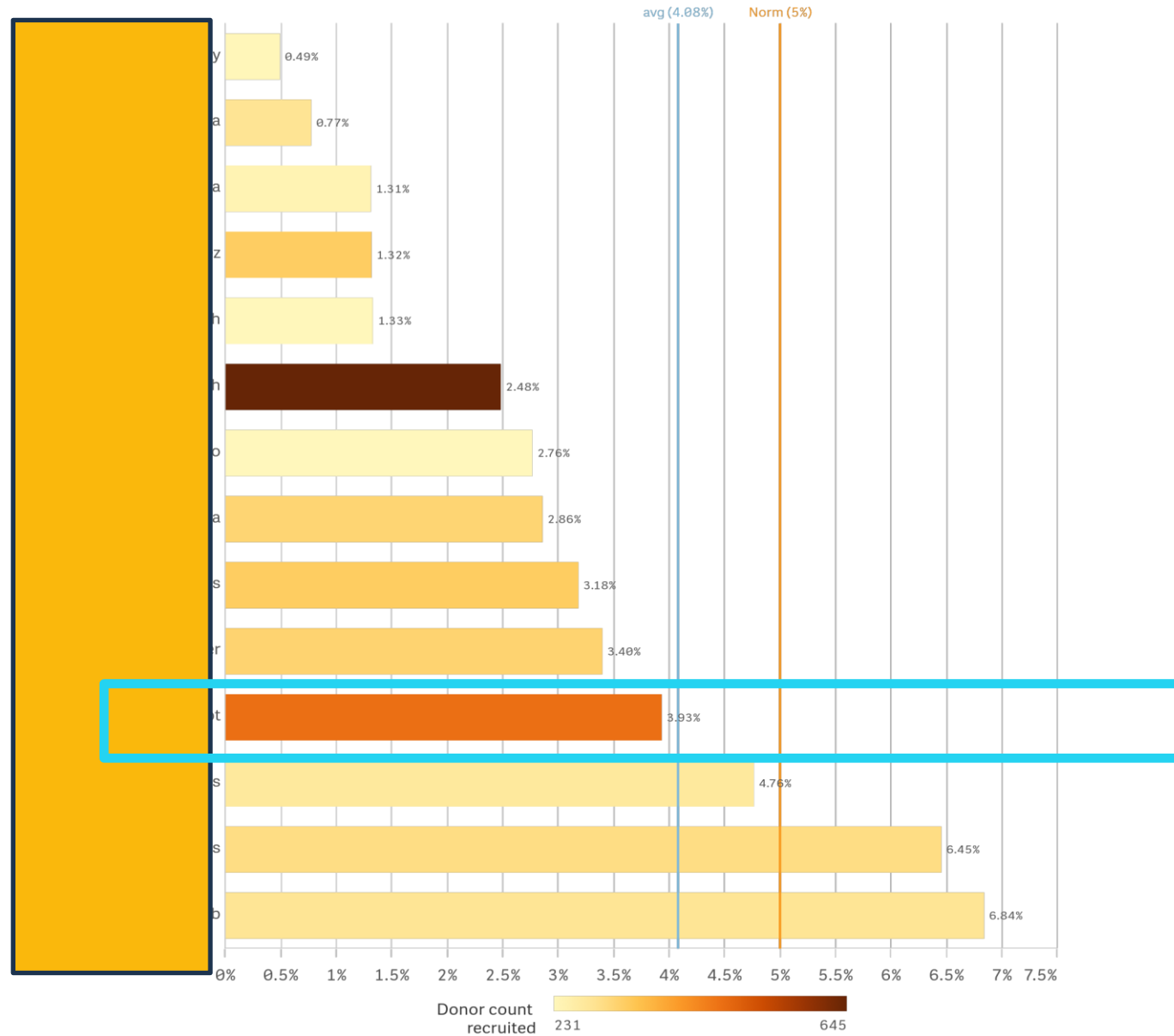
Email Bounces and Unsubscribes shortly after sign up are a strong predictor of later retention.

You can track, train, and reward individual canvassers using this information.

Top Recruiters: Bounces and Unsubscribes

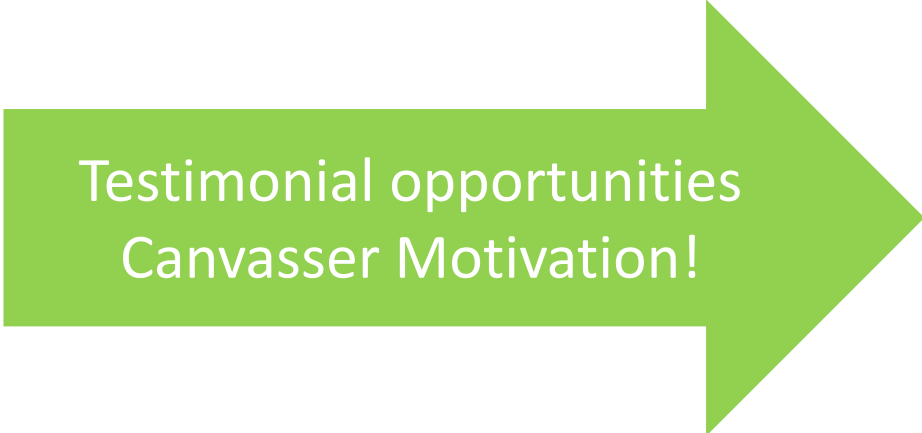
Bounces for survey invite emails

Limited to recruiters who recruited more than 231 donors.



Open text Comments

- Lots of positive comments:
 - MOTIVATION for canvassers
 - Volunteering offers
 - Major donor potential
- Critical notes from your donors:
 - Trapped into giving
 - Please don't start sending me junk mail
 - Recruiter empathy on sensitive issues



Testimonial opportunities
Canvasser Motivation!



Rethinking strategy & tactics
Training focus

Open Text Comments for Individual Recruiter (highlighted)

recruitment_date	feedback_date	ruiting_age	recruiting_recruiter	DVprofile_intentiontostay	Email Disposition	Survey Source	Comment
2023-06-03	2023-06-05			5 - definitely continue	sent	survey online	
2023-05-22	2023-05-31			4 - probably continue	sent	survey call	great guy, should be a one time option
2023-05-20	2023-06-01			4 - probably continue	sent	survey call	wish process was a bit quicker
2023-05-11	2023-05-19			5 - definitely continue	sent	survey call	phenomenal deserves a raise
2023-04-18	2023-04-29			5 - definitely continue	sent	survey call	awesome interaction
2023-04-17	2023-05-24			0 - already cancelled	sent	survey call	
2023-04-17	2023-04-29			2 - probably won't continue	sent	survey call	na
2023-04-15	2023-04-29			0 - already cancelled	sent	survey call	it should be clear that it a monthly, there should be a one time option
2023-04-13	2023-04-27			4 - probably continue	sent	survey call	great interaction
2023-04-11	2023-04-29			3 - might continue	sent	survey call	na
2023-04-11	2023-04-28			4 - probably continue	sent	survey call	na
2023-04-11	2023-04-13			3 - might continue	sent	survey online	
2023-04-09	2023-04-27			5 - definitely continue	sent	survey call	na
2023-04-07	2023-04-27			2 - probably won't continue	sent	survey call	should be a one time option, seemed a bit suspect, too time consuming
2023-04-07	2023-04-26			5 - definitely continue	sent	survey call	should have been told up front it was monthly
2023-04-07	2023-04-26			5 - definitely continue	sent	survey call	funny and nice guy
2023-04-06	2023-04-22			3 - might continue	sent	survey call	na
2023-04-03	2023-04-22			3 - might continue	sent	survey call	felt a little bit corny, stop trying to make me feel like im your buddy
2023-04-02	2023-04-23			5 - definitely continue	sent	survey call	conversation made me think
2023-03-29	2023-03-31			4 - probably continue	unsub	survey online	Stay positive and keep doing a great job superheroes.
2023-03-17	2023-03-19			3 - might continue	unsub	survey online	
2023-03-01	2023-04-06			4 - probably continue	sent	survey call	na
2023-03-01	2023-04-06			4 - probably continue	sent	survey call	na
2023-02-17	2023-04-06			4 - probably continue	sent	survey call	
2023-02-01	2023-02-24			5 - definitely continue	sent	survey call	
2023-01-26	2023-02-16			4 - probably continue	sent	survey call	might need to adjust amount wants to keep giving
2023-01-19	2023-02-17			5 - definitely continue	sent	survey call	
2023-01-18	2023-02-17			2 - probably won't continue	sent	survey call	
2022-05-22	2022-05-31			3 - might continue	sent	survey online	

- ❖ 29 survey completes in 2023
- ❖ 1 already canceled, 4 additional likely cancels
- ❖ 13 open-end comments,
- ❖ 4 referencing 1x

OPTIMIZING FACE-TO-FACE DONOR RETENTION

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The Solution



Thank you!



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Read more on the Agitator Blog
<https://agitator.thedonorvoice.com>

APPENDIX

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