Heartburst

# From Connection to Impact:

## Maximising Your CRM to strengthen donor relationships


Rob van der End - CEO

Email rob@heartburst.com.au

Linkedin linkedin.com/in/rvanderend/

Nick Dubé - Head of Digital

nick@heartburst.com.au

https://www.linkedin.com/in/nick-dubé-490b7618/

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# Who are we?

A digital agency providing tailored CRMs and crafted websites for nonprofits.

# Your faith-aligned digital partner for positive impact.

- Digital Discovery
- Branding
- Web Design
- Web development
- Integration
- Custom dev
- Mobile Apps
- Impact Reports
- CRM Selection
- CRM implementation
- Hosting
- SEO
- Donor Journeys

# From Connection to Impact:

Maximising Your CRM to strengthen donor relationships

## Agenda

- What is CRM
- Case Study
- Why CRMs matter
- Donor Journey principles
- Responsive CRM
- Donor Journey Maturity
- Human-Centred Design
- Automation
- Poll/QA

# What is a CRM / Donor Management / CMS

- **Definition**: A Customer Relationship Management (CRM) system is a tool that centralizes donor data—contact details, giving history, and interactions—to build stronger, faith-driven relationships.
- **Purpose:** Streamlines donor engagement, tracks journeys, and aligns with stewardship values by focusing on people, not just transactions.
- **Nonprofit Impact:** 74% of U.S. nonprofits use CRMs to manage donor interactions effectively *(Data Axle, 2023)*.

**Heartburst Insight:** A CRM is your mission's backbone, enabling personalized outreach that reflects your organization's values.

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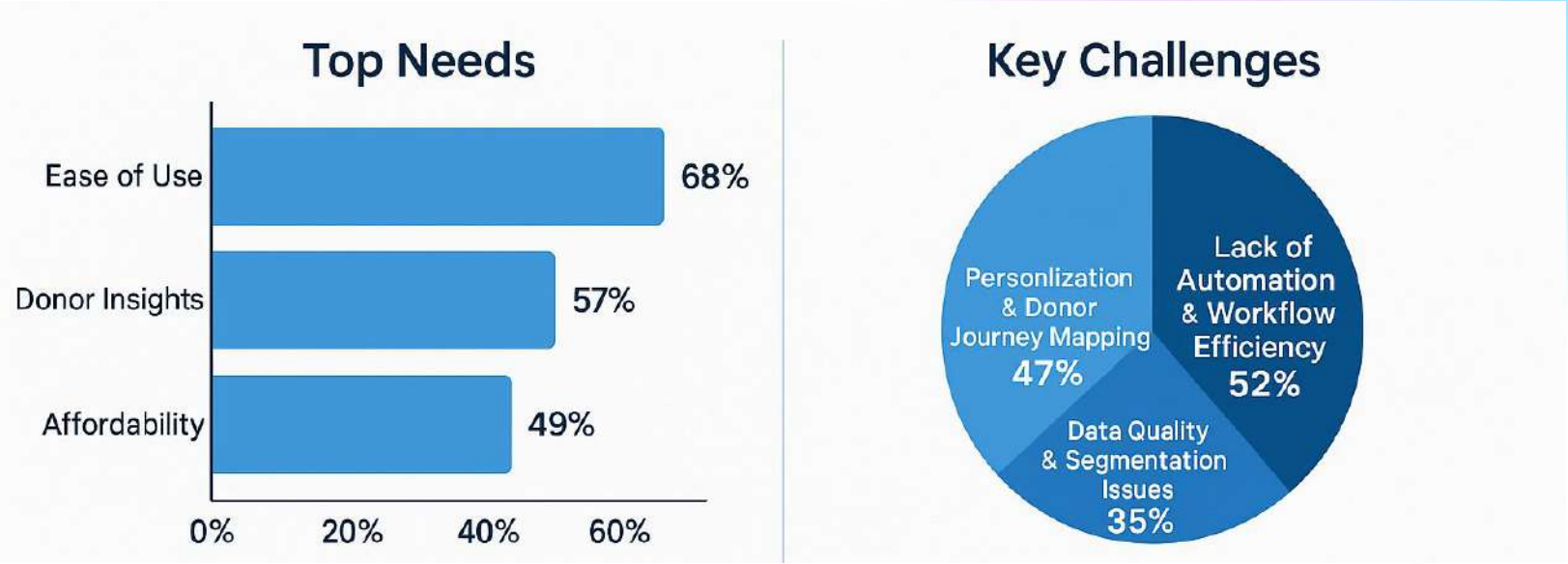
# What Nonprofits want from CRMs




Sources:Salesmate 2024, CRM.org 2025, Nonprofit Tech for Good 2024

Bloomerang 2024, Virtuous 2025, Insycle 2024

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# CRMs as the Heart of Donor Journeys?

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# Case Study - PeaceWise

A peacemaker is someone who is equipped to bring peace to conflict, restoration to damaged relationships and the hope of Jesus in difficult situations.

We help individuals, organisations and communities learn life-changing biblical peacemaking principles and build cultures of peace.

PeaceWise
building peacemakers for life

## The Challenge

Data was in 4 separate systems - no ability to have a complete view of a customer, their engagement with PeaceWise such as training programs, licenses ....

Small but growing organisation, need efficiencies but also transparency in processes.

Grow relationships with their customers to help them live with culture of peace through communication, donations, use of content.

Were considering Hubspot and Salesforce

# The Solution

**Implementation of Virtuous CRM:** streamline their contact management by moving data from all sources into the CRM.

**Integration with existing systems**: Integrating with ticketing, training, website and accounting systems

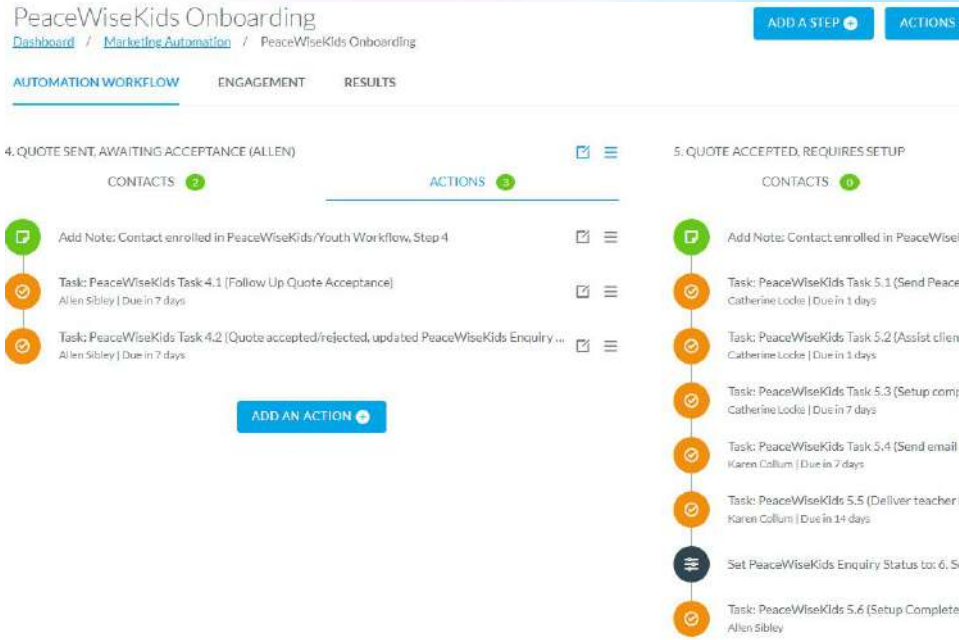
**Integrate website with Virtuous:** Capture data and workflows for automation.

**Create automations:** automatically tag new contacts and create to-do lists, follow up and send emails to contacts that engage with PeaceWise

**Donor Fundraising:** adding donor journey as new way of adding resource to the organisation (donations were rare previously)

# Approach

Workshopped requirements and processes and integrations to determine best fit



# The Result

A solution that enables relationship building, efficient deployment of resources and automations that make a difference

## Quotes

“We now have an ability to see all interactions with a contact regardless of how they contacted us.  This is saving us time but also improves our relationship with our clients.”

Wayne Forward - CEO
PeaceWise

# Why CRMs Matter for Donor Engagement

- **Centralized Relationships:** CRMs consolidate donor data, enabling personalized communication that strengthens trust.
- **Boost Retention**: 90% of nonprofits using CRMs report improved donor retention rates *(Source: Nonprofit Tech for Good, 2024)*.
- **Drive Engagement:** Organizations leveraging CRM analytics see a 30% increase in donor engagement *(Source: Blackbaud Institute, 2024)*.
- **Faith-Aligned Impact:** CRMs align with stewardship values, freeing resources for mission-driven work.

**Heartburst Insight:** Strong donor relationships start with understanding their needs—CRMs make this possible.

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# CRMs as the Foundation for Donor Journeys

- **Map the Journey:** CRMs track donor interactions from first gift to lifelong advocate, reducing 80% first-time donor churn *(Source: Fundraising Effectiveness Project, 2024)*.
- **Personalized Touchpoints:** Deliver tailored messages, as 74% of donors expect customized engagement *(Source: DonorPerfect, 2024)*.
- **Build Trust:** Transparent impact reporting via CRMs increases donor satisfaction by 25% *(Source: Guidestar, 2023)*.
- **Faith-Aligned Stewardship**: Automate thank-yous and impact reports to show donors their gifts matter, boosting satisfaction by 25% *(Guidestar, 2023)*.

**Heartburst Approach:** Use CRMs to guide donors through meaningful connections, not just transactions.

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# Key CRM Features for Journey Mapping

**Segmentation**: Categorize donors by giving history or interests for targeted outreach (e.g., 65% higher response rates, per Salesforce, 2024).

**Analytics & Reporting**: Monitor engagement metrics to refine journeys in real-time.

**Automation**: Streamline follow-ups, like thank-you emails within 48 hours, boosting repeat gifts by 4x (Source: Fundraising Effectiveness Project, 2024).

**Integration**: Sync with email and social platforms for seamless communication.

**Heartburst Tip:** Choose a CRM that scales with your nonprofit's vision and donor growth.

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# What is a donor journey and why it matters

## From First Gift to Lifelong Advocate

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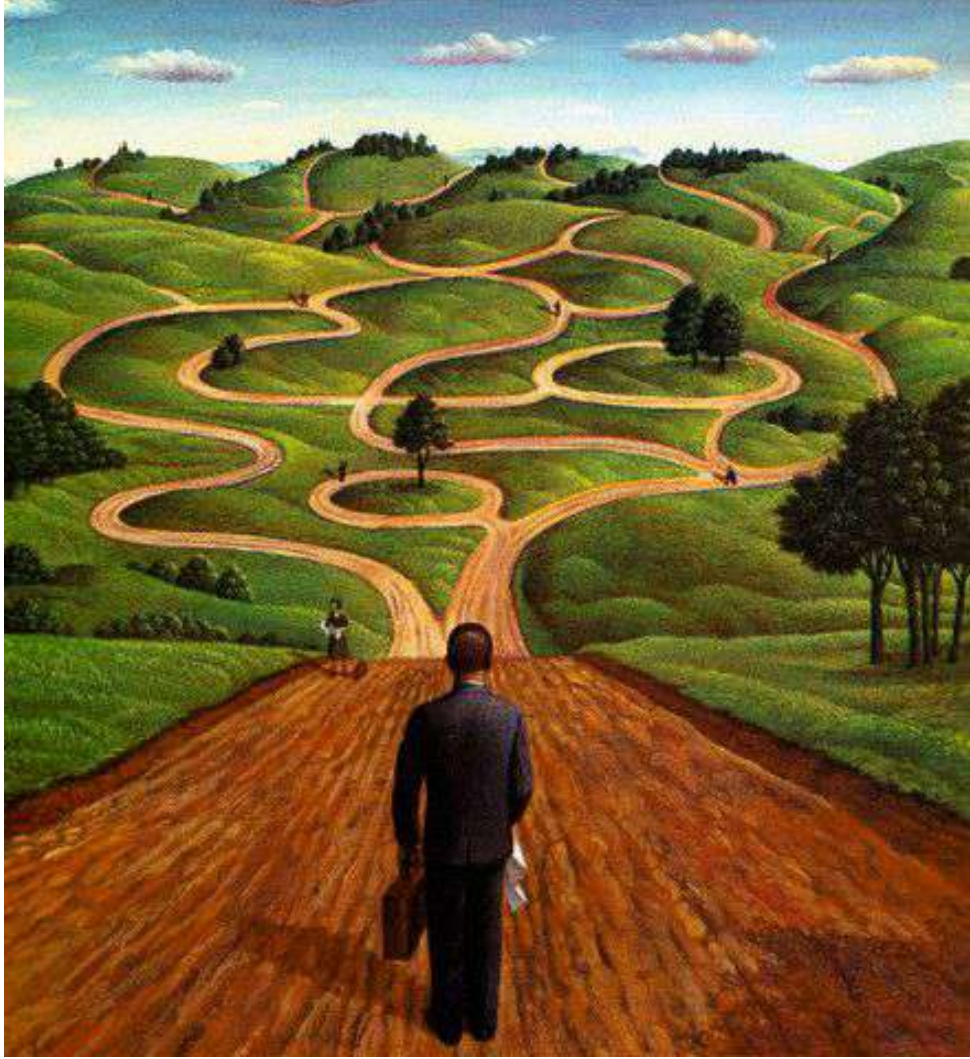
# Donors are on a Journey...

Without a plan - they are on their own

- They never go farther than they've already been.
- They wander and miss the best lookouts (ways to be involved)
- They get lost....

*80% of first-time givers won't make another gift*
(Fundraising Effectiveness Project Q4 report)



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# Engagement matters

Imagine losing 80% of your new donors because you didn't follow up effectively!

- Thank donors within 48hrs: 4x more likely to give again
- Show gift impact:  gives 80% boost in choosing effective charities
- Share personal impact stories: 84% of recurring donors become advocates.

*Sources: Fundraising Effectiveness Project 2024, Guidestar, Impact Genome 2022, DonorPerfect 2023*

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# Why does this happen?

**NOT because**

- They are ungenerous
- Cause is unimportant
- Nobody cares

*70% of donors stop giving due to poor communication*

*(Bloomerang, 2023)*

**It's about**

- Unnecessary friction
- Irrelevant messages
- Inadequate communication

*"When you reduce friction, making something easy, people do more of it."*

***- Jeff Bezos***

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# What is a Donor Journey?

A series of connections, communications, events, and conversations that bring donors closer to your organisation and closer to making a gift (or volunteer or advocate or....).

It helps them to **meaningfully connect** with the cause they already care about....

> *By reducing friction in the customer experience, you create a seamless path to loyalty and action."*
>
> ***– Shep Hyken, Customer Service Expert***

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# Story - Mary - missed opportunity

Mary is passionate about a cause

- Makes a donation
- Gets a generic thank-you email/letter.
- Receives occasional, impersonal donation requests.
- Thank-yous repeat, ignoring her history or interests.

**Result**:  Mary gives sporadically,  easily swayed by another organisation.

Her journey didn’t take her past her starting point.

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# Mary - what went wrong

- **One-off** actions, instead of a journey
- **Impersonal** messaging
- Nothing **connects** her to the larger mission or her own **impact**
- No next step - except, give again.

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# Matthew’s adventure

Matthew makes a donation

- Receives a thank-you letter.
- Gets a welcome email series with cause info and involvement options.
- Clicks link to explore a program.
- Invited to a panel discussion; attends and meets staff.
- Follow-up call thanks him and asks for feedback.
- Invited to become a monthly giver.

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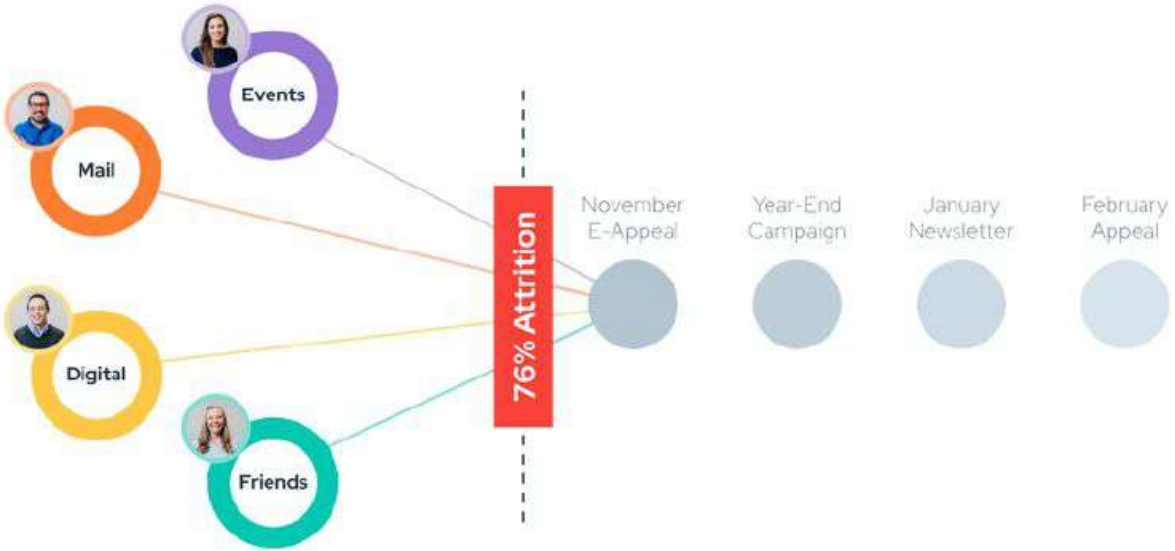
# Questions

Is Matthew more generous or passionate than Mary?

Why are these donor journeys and outcomes different?




*“When someone starts listening, you should say hello, right? When someone asks for more, give them your best. I think of the welcome series as both smart marketing and common courtesy.”*

***Andy Crestodina, Chief Marketing Officer, Orbit Media***

# The Responsive CRM Model

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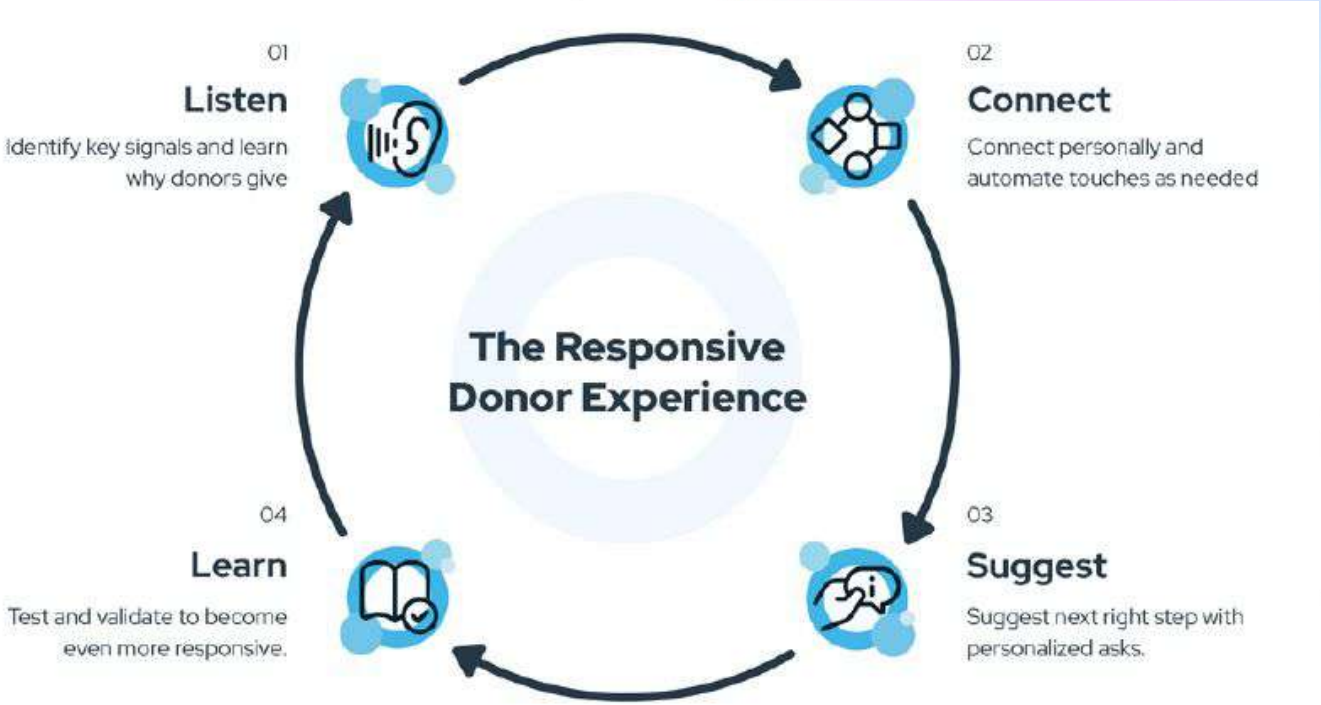
# The responsive framework

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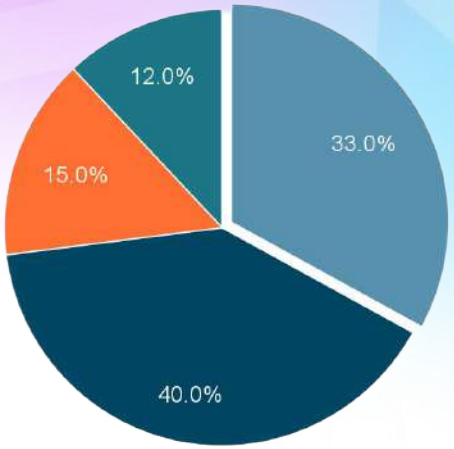
# Segmentation: Know Your Donors




**Characteristics:**

- Groups donors by shared traits or behaviors.
- Moves beyond one-size-fits-all messaging.

**Actions:**

- Segment by passion, giving frequency, or capacity.
- Use CRM to track engagement (e.g., donations, events).
- Tailor campaigns to each segment's interests.

**Example**: First-time donors get a welcome series; volunteers get event invites.

**Outcome**: Increases relevance, boosts engagement.

**Metric**: 30% higher email open rates with segmented campaigns (DonorPerfect, 2023).

*"Segmentation turns strangers into known partners." – Kivi Leroux Miller*

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# Personas: Bring Donors to Life

**Characteristics**:

- Fictional profiles based on real donor data.
- Reflect behaviors, needs, and preferences.

**Actions**:

- Create 3–4 personas (e.g., “Veronica Volunteer”).
- Automate persona tagging based on behavior.
- Personalize touchpoints using persona insights.

**Example**: “Veronica” gets tailored emails about volunteer opportunities.

**Outcome**: Deepens connections, drives loyalty.

Metric: 80% engagement boost with personalized content (Impact Genome, 2022).

*“Personas make every donor feel seen.” – Beth Kanter*

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# Donor Journey Maturity Path

1. **Foundational**: **Basic Engagement**
   Centralize data, send timely thank-yous, welcome new donors.
2. **Developing**: **Intentional Communication**
   Map basic journeys, segment donors, automate welcome series.
3. **Strategic**: **Personalised Journeys**
   Use personas, track behaviors, personalize multichannel campaigns.
4. **Transformative: Dynamic Advocacy**
   Leverage predictive analytics, integrate tools, inspire advocacy.

   *Outcome*: From transactional to transformative donor relationships.

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# 1. Foundational: Basic Engagement

**Characteristics:**

- Transactional, generic communications.
- Siloed data, minimal CRM use.

**Actions:**

- Centralize donor data in a CRM.
- Send thank-yous within 48 hours.
- Welcome new donors with mission email.

**Example:** Generic thank-you email sent after a donation.

**Outcome:** Builds trust, improves retention.

**Metric**: 20% increase in thank-you email open rates (FEP, 2024).

*“Gratitude is the foundation of generosity.” – Lynne Twist*

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# 2. Developing: Intentional Communication

**Characteristics:**

- Basic journey mapping for key segments.
- Simple segmentation, initial automation.

**Actions:**

- Map first-time donor journey (thank-you, welcome, update).
- Segment by giving frequency or interests.
- Automate welcome emails with impact stories.

**Example:** New donor gets a welcome series about programs.

**Outcome:** Boosts engagement, drives second gifts.

**Metric:** 30% increase in second-gift conversion (FEP, 2024).

*“Connect with purpose, and donors will follow.” – Penelope Burk*

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# 3. Strategic: Personalized Journeys

**Characteristics:**

- Donor personas guide tailored communications.
- Multichannel, behavior-based campaigns.

**Actions:**

- Build 3–4 personas (e.g., “Veronica Volunteer”).
- Track behaviors for personalized follow-ups.
- Use multichannel campaigns (email, SMS).

**Example**: Volunteer gets targeted event invite based on interests.

**Outcome**: Higher retention, increased donor value.

**Metric**: 80% boost in engagement with impact metrics (Impact Genome, 2022).

*“Personalization turns donors into partners.” – Kivi Leroux Miller*

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# 4. Transformative: Dynamic Advocacy

**Characteristics:**

- Dynamic, real-time journeys using data.
- Advanced automation, advocacy focus.

**Actions**:

- Use predictive analytics for real-time journeys.
- Integrate CRM with marketing tools.
- Share personal impact stories to inspire advocacy.

**Example**: Donor becomes monthly giver, shares story online.

**Outcome**: Donors become lifelong advocates.

**Metric**: 84% of recurring donors become advocates (DonorPerfect, 2023).

*“Inspire donors to amplify your mission.” – Beth Kanter*

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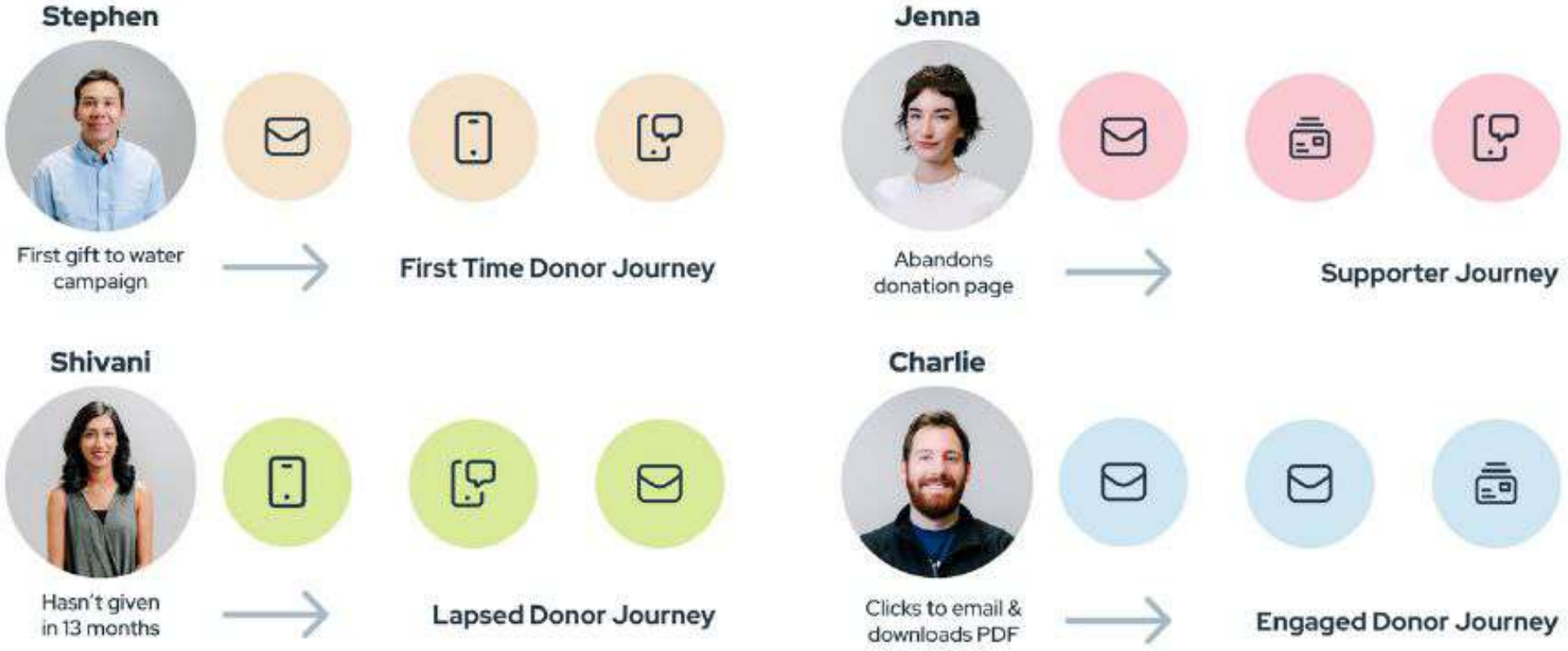
# Dynamic campaigns driven by Donor



# Automation allows us to do this at scale

An automated donor journey:

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Do not edit
How to change the design

# What stage is your organization currently in regarding donor engagement?

Presenting with animations, GIFs or speaker notes? Enable our Chrome extension

slido

# Planning a donor journey using human centred design principles

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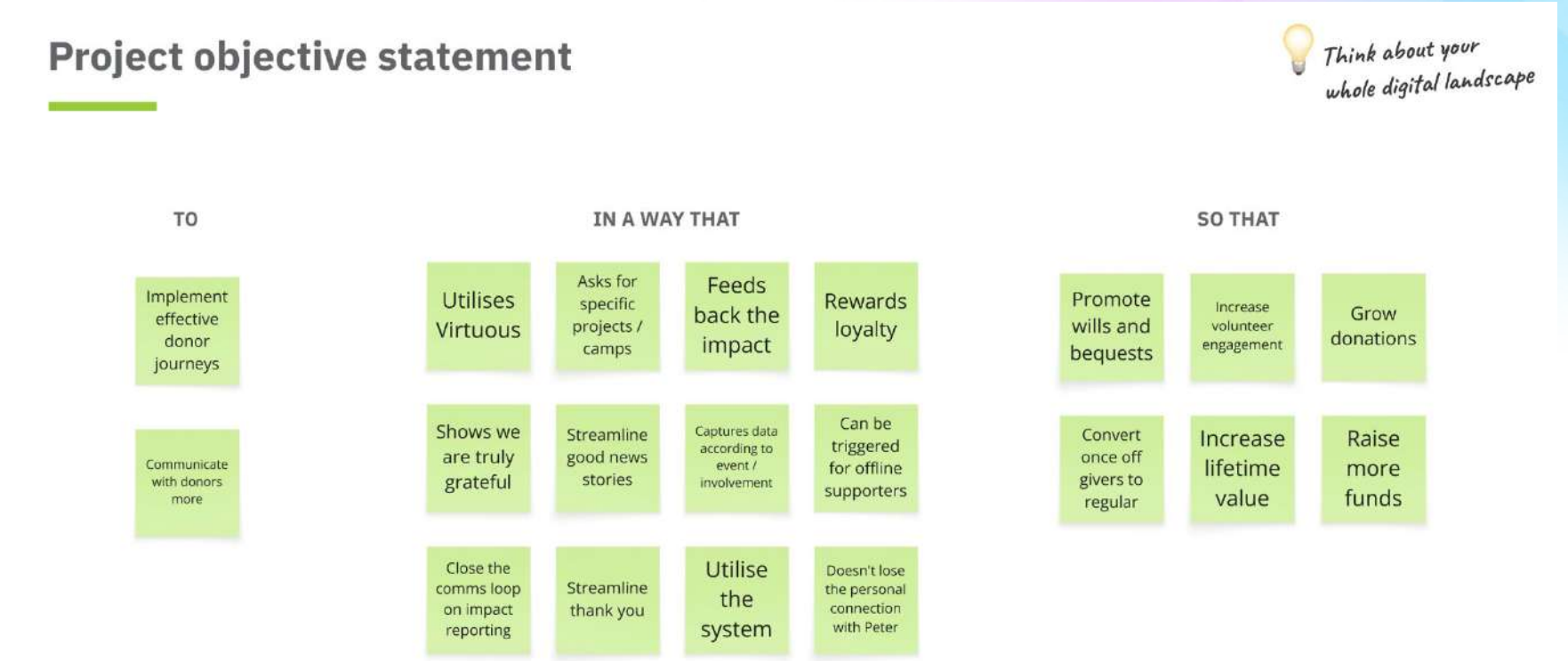
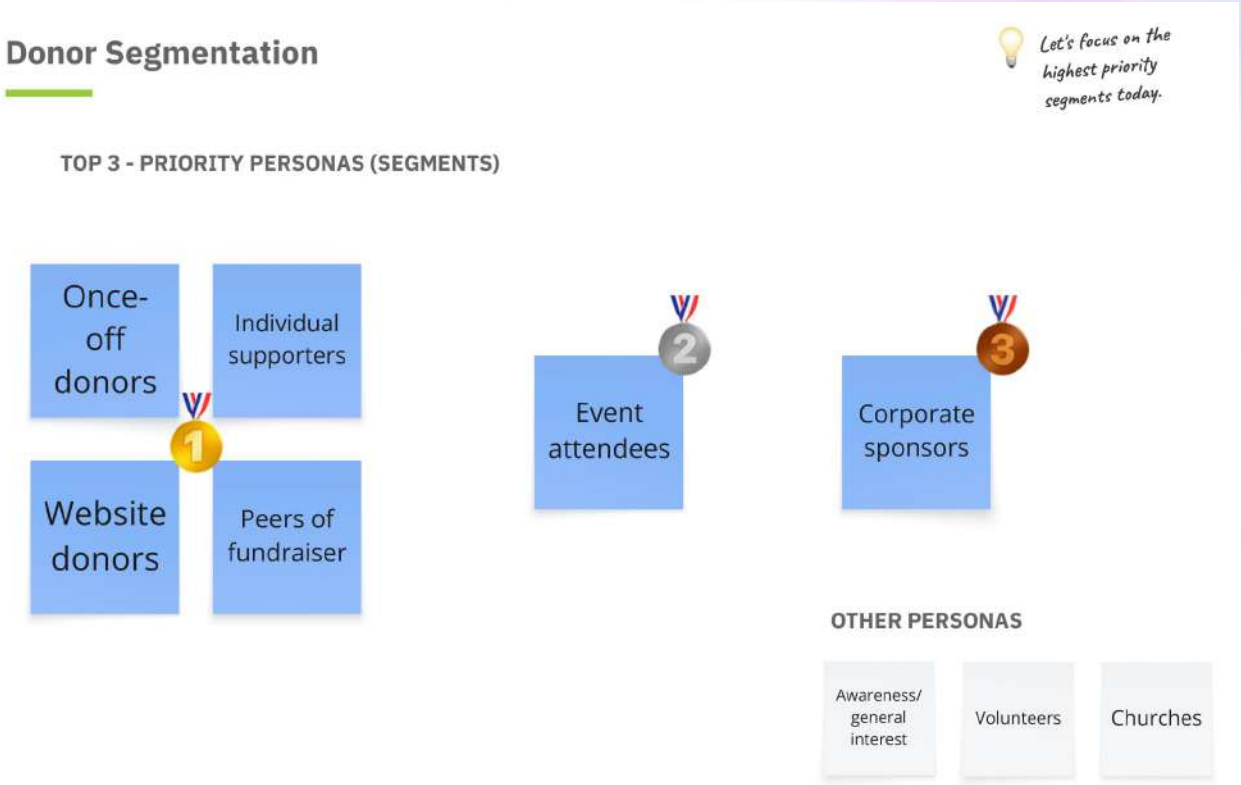
# Start with your strategic goals

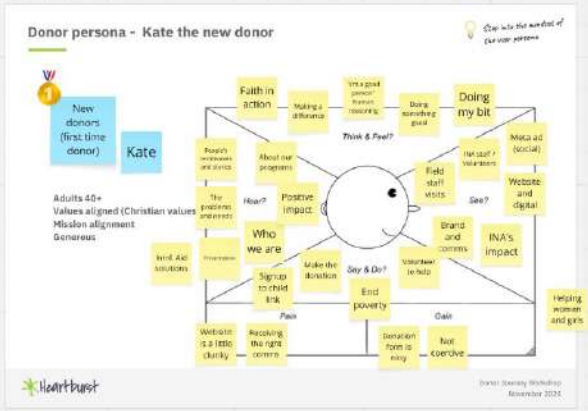


# Identify and prioritise your personas

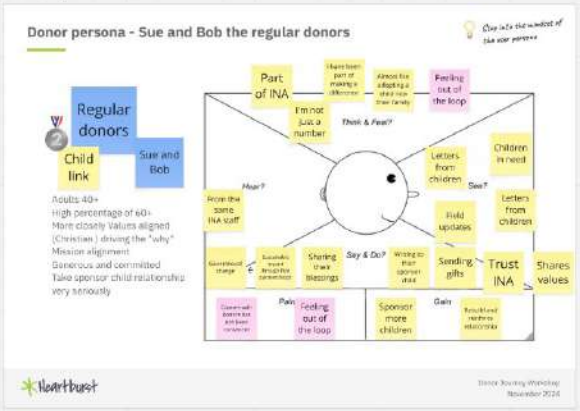


# Unpack the mindset of your personas

User persona 1




Donor persona 2

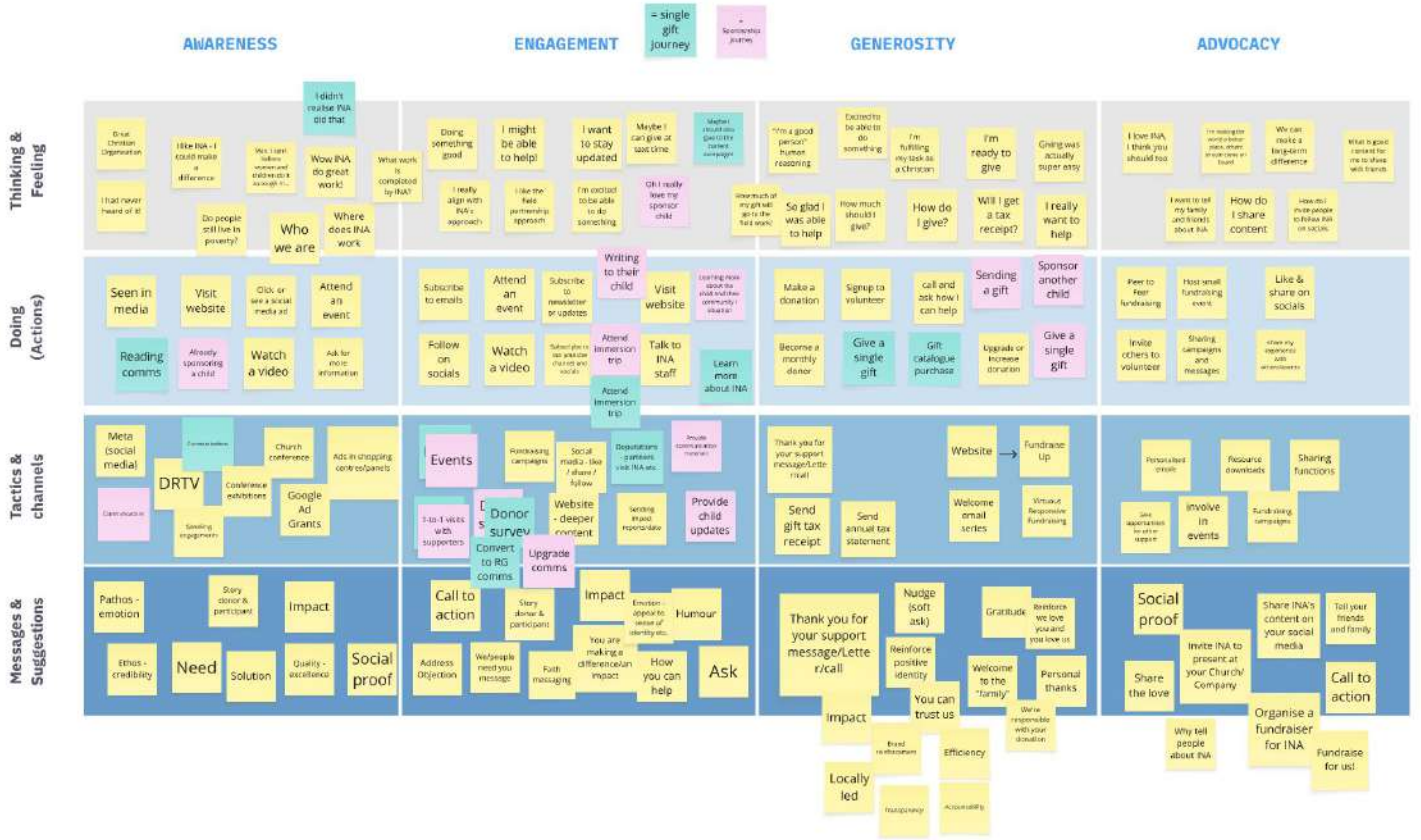



Donor persona 3

What are your personas thinking, feeling, hearing, seeing, saying, and doing?

What pains and gains to they have as they approach your organisation?

# Analyse your donor lifecycle



# Gather data driven insights

- Web stats (Google Analytics)
- Email marketing performance (Mailchimp, Campaign Monitor etc.)
- Survey results (Survey Monkey, Google Forms)
- User testing (Hot Jar, Crazy Egg)
- CRM data

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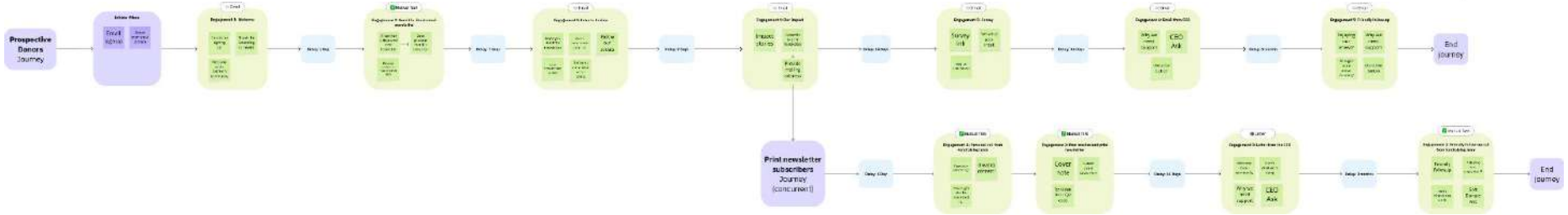
# Plan your journey(s)!



# Configuring your donor journey automation

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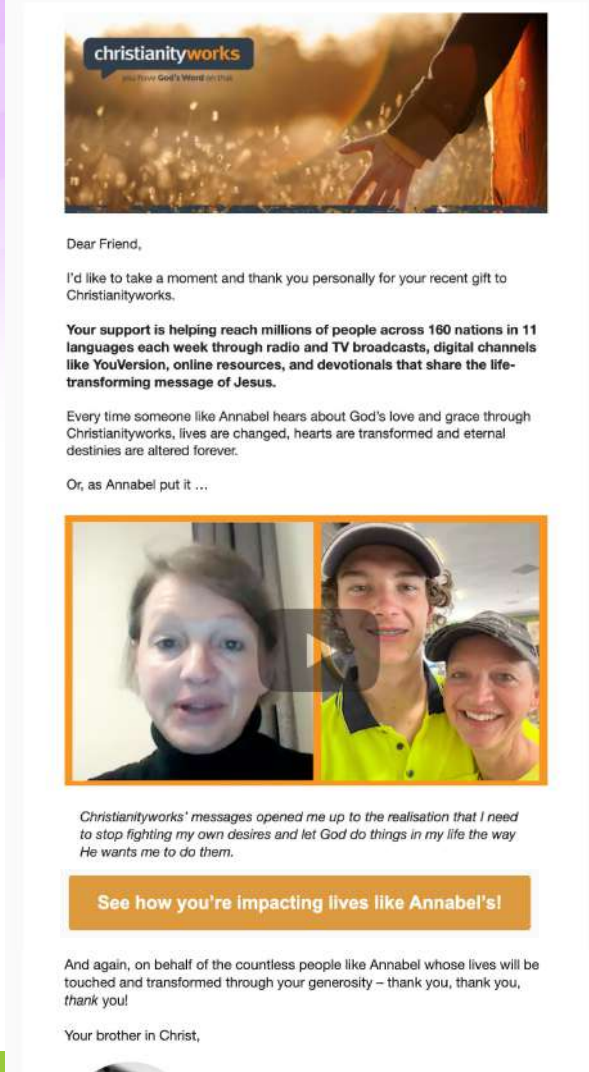
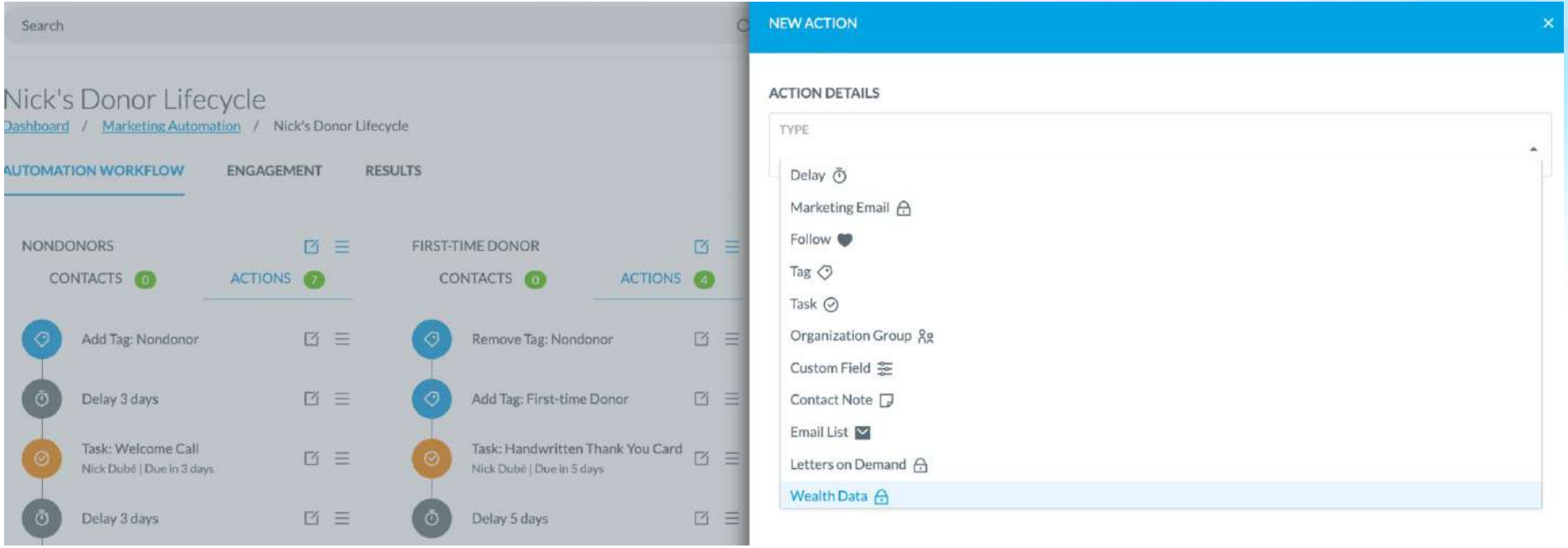
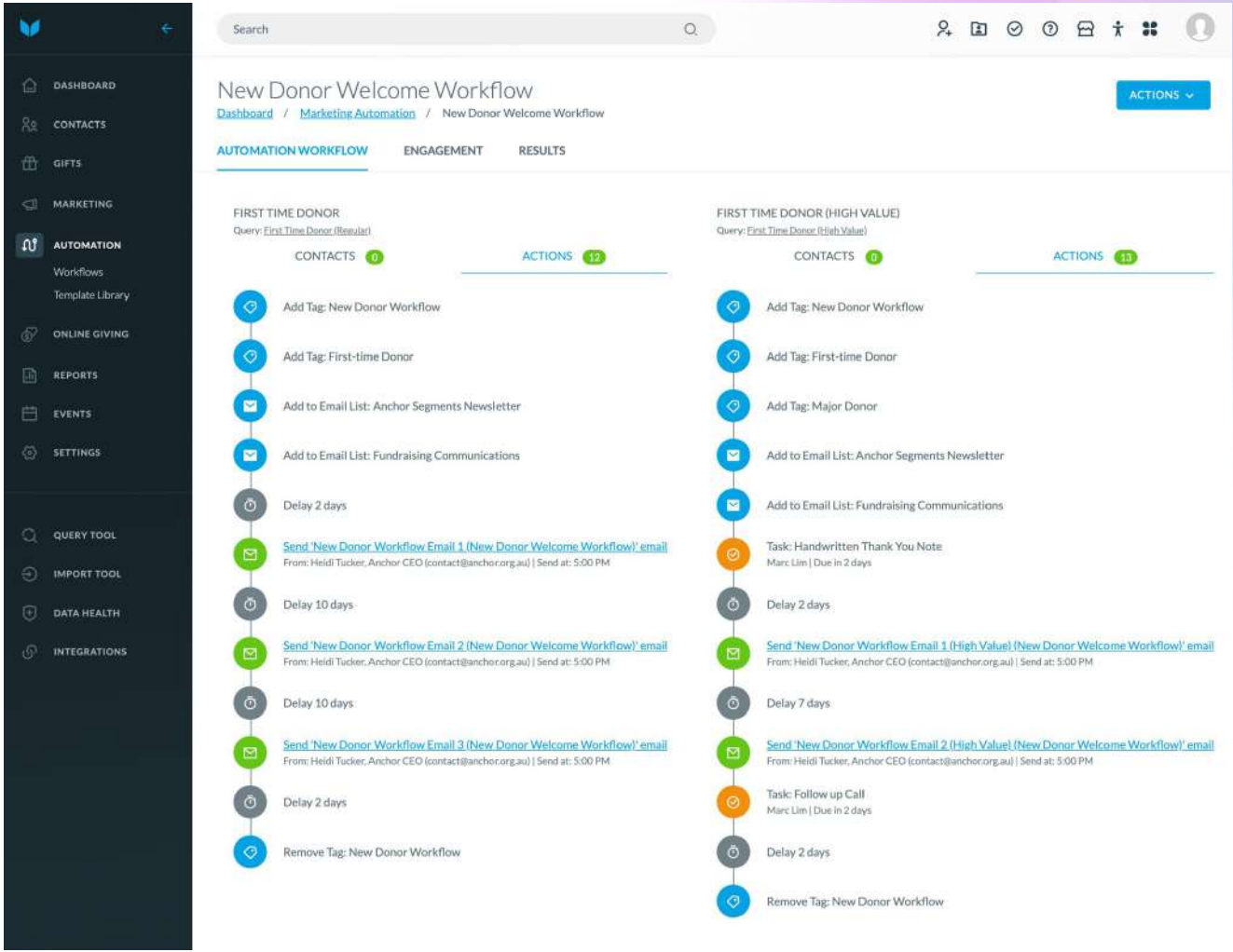
# Prepare content and creative

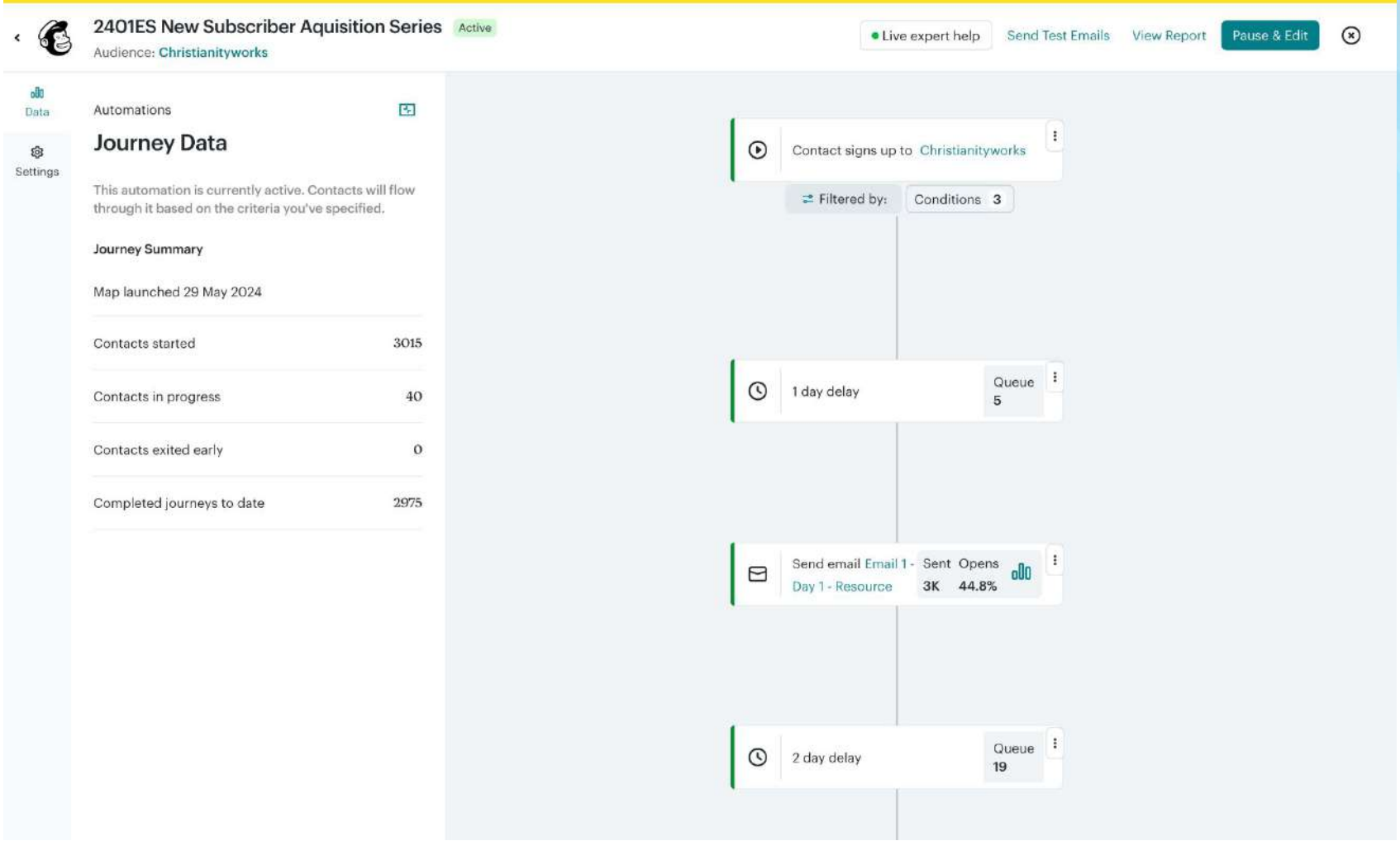
- Copywriting
  - Email templates
  - Resource downloads
  - Letters
- Call transcripts
- Photography
- Videography
- Website development (Landing pages)
- Branding and graphic design



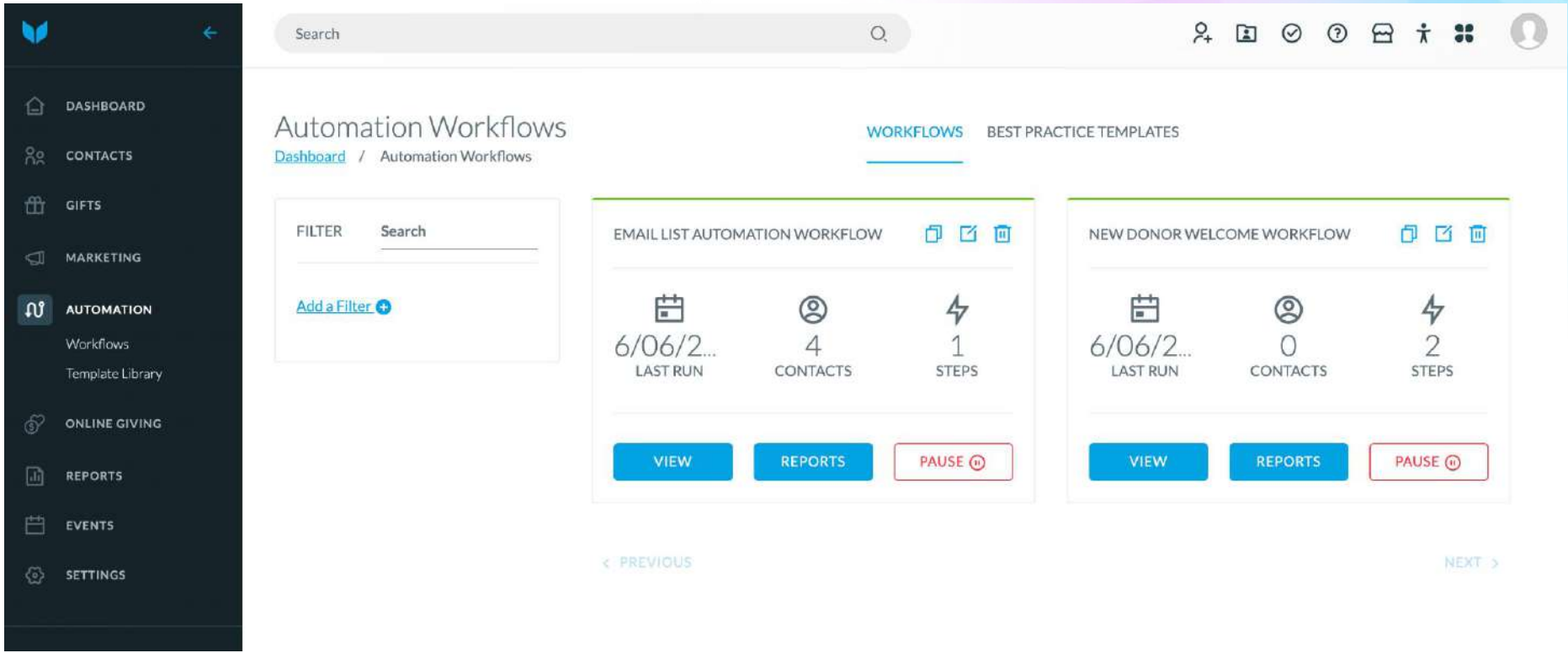
# Configure your automation




Search
DASHBOARD
CONTACTS
GIFTS
MARKETING
AUTOMATION
Workflows
Template Library
ONLINE GIVING
REPORTS
EVENTS
SETTINGS
QUERY TOOL
IMPORT TOOL
DATA HEALTH
INTEGRATIONS
New Donor Welcome Workflow
Dashboard / Marketing Automation / New Donor Welcome Workflow
ACTIONS
AUTOMATION WORKFLOW
ENGAGEMENT
RESULTS
FIRST TIME DONOR
Query: First Time Donor (Regular)
CONTACTS 0
ACTIONS 12
Add Tag: New Donor Workflow
Add Tag: First-time Donor
Add to Email List: Anchor Segments Newsletter
Add to Email List: Fundraising Communications
Delay 2 days
Send 'New Donor Workflow Email 1 (New Donor Welcome Workflow)' email
From: Heidi Tucker, Anchor CEO (contact@anchor.org.au) | Send at: 5:00 PM
Delay 10 days
Send 'New Donor Workflow Email 2 (New Donor Welcome Workflow)' email
From: Heidi Tucker, Anchor CEO (contact@anchor.org.au) | Send at: 5:00 PM
Delay 10 days
Send 'New Donor Workflow Email 3 (New Donor Welcome Workflow)' email
From: Heidi Tucker, Anchor CEO (contact@anchor.org.au) | Send at: 5:00 PM
Delay 2 days
Remove Tag: New Donor Workflow
FIRST TIME DONOR (HIGH VALUE)
Query: First Time Donor (High Value)
CONTACTS 0
ACTIONS 13
Add Tag: New Donor Workflow
Add Tag: First-time Donor
Add Tag: Major Donor
Add to Email List: Anchor Segments Newsletter
Add to Email List: Fundraising Communications
Task: Handwritten Thank You Note
Marc Lim | Due in 2 days
Delay 2 days
Send 'New Donor Workflow Email 1 (High Value) (New Donor Welcome Workflow)' email
From: Heidi Tucker, Anchor CEO (contact@anchor.org.au) | Send at: 5:00 PM
Delay 7 days
Send 'New Donor Workflow Email 2 (High Value) (New Donor Welcome Workflow)' email
From: Heidi Tucker, Anchor CEO (contact@anchor.org.au) | Send at: 5:00 PM
Task: Follow up Call
Marc Lim | Due in 2 days
Delay 2 days
Remove Tag: New Donor Workflow


2401ES New Subscriber Aquisition Series
Active
Audience: Christianityworks
Live expert help
Send Test Emails
View Report
Pause & Edit
Data
Settings
Automations
Journey Data
This automation is currently active. Contacts will flow through it based on the criteria you've specified.
Journey Summary
Map launched 29 May 2024
Contacts started 3015
Contacts in progress 40
Contacts exited early 0
Completed journeys to date 2975
Contact signs up to Christianityworks
Filtered by: Conditions 3
1 day delay
Queue 5
Send email Email 1 - Day 1 - Resource
Sent 3K
Opens 44.8%
2 day delay
Queue 19

# Activate your automation



# Measure responsiveness through dashboard(s)

# Getting started with donor journeys

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# Getting Started with Donor Journeys

**Key Takeaways:**

- **CRMs Empower Journeys:** Use CRMs to map donor journeys, reducing churn by 80% and boosting engagement by 30% *(Fundraising Effectiveness Project, 2024; Blackbaud, 2024).*
- **Plan with Purpose:** Apply human-centered design to create personalised, faith-aligned donor experiences.
- **Automate for Impact**: Set up automated workflows (e.g., thank-yous within 48 hours) to increase repeat gifts by 4x *(Fundraising Effectiveness Project, 2024).*

**Next Steps:**

- Rally your team to map donor journeys using CRM tools.
- Focus on content that connects donors to your mission.
- Start small: Test one automated workflow, like a new donor welcome series.

**Heartburst Support:** Our CRM consulting and implementation services help you build seamless donor journeys. Book a free 1 hour CRM or Donor Journey consult with us.

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Do not edit
How to change the design

# Audience Q&A

Presenting with animations, GIFs or speaker notes? Enable our Chrome extension

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**Thank you!**

# Visit us at our exhibition stand!

**Rob van der End**
CEO
rob@heartburst.com.au

**Nick Dubé**
Head of Digital
nick@heartburst.com.au

**Jenna Bell**
CRM Relationship Manager
jenna.bell@heartburst.com.au

**FREE DONOR JOURNEY / CRM CONSULT**