



From Connection to Impact:

Maximising Your CRM to strengthen donor relationships

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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

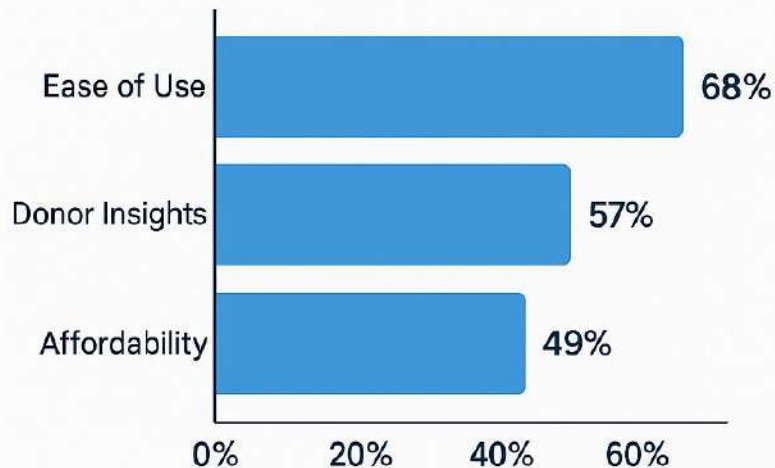
What is a CRM / Donor Management / CMS

- **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*).

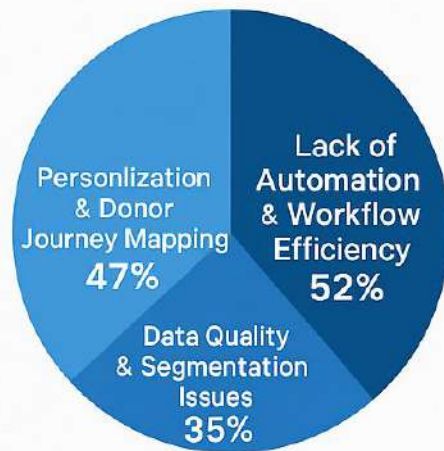
Heartburst Insight: A CRM is your mission's backbone, enabling personalized outreach that reflects your organization's values.

What Nonprofits want from CRMs

Top Needs



Key Challenges



Sources: Salesmate 2024, [CRM.org](https://www.crm.org) 2025,
Nonprofit Tech for Good 2024

Bloomerang 2024, Virtuous 2025, Insycle 2024

CRMs as the Heart of Donor Journeys?

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.



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 screenshot displays the 'PeaceWiseKids Onboarding' interface, specifically the 'AUTOMATION WORKFLOW' tab. The workflow is divided into two main sections: '4. QUOTE SENT, AWAITING ACCEPTANCE (ALLEN)' and '5. QUOTE ACCEPTED, REQUIRES SETUP'. Each section has a 'CONTACTS' column with a green circle icon and an 'ACTIONS' column with a green circle icon. The 'ACTIONS' column contains a list of tasks with checkboxes and menu icons. A blue button labeled 'ADD AN ACTION' is visible at the bottom of the first section.

PeaceWiseKids Onboarding

[Dashboard](#) / [Marketing Automation](#) / PeaceWiseKids Onboarding

[ADD A STEP](#) [ACTIONS](#)

[AUTOMATION WORKFLOW](#) [ENGAGEMENT](#) [RESULTS](#)

4. QUOTE SENT, AWAITING ACCEPTANCE (ALLEN)

CONTACTS 2 ACTIONS 3

- Add Note: Contact enrolled in PeaceWiseKids/Youth Workflow, Step 4
- Task: PeaceWiseKids Task 4.1 (Follow Up Quote Acceptance) Allen Sibley | Due in 7 days
- Task: PeaceWiseKids Task 4.2 (Quote accepted/rejected, updated PeaceWiseKids Enquiry...) Allen Sibley | Due in 7 days

[ADD AN ACTION](#)

5. QUOTE ACCEPTED, REQUIRES SETUP

CONTACTS 0

- Add Note: Contact enrolled in PeaceWiseKids/Youth Workflow, Step 4
- Task: PeaceWiseKids Task 5.1 (Send PeaceWiseKids Enquiry to Catherine Lode) Catherine Lode | Due in 1 days
- Task: PeaceWiseKids Task 5.2 (Assist client Catherine Lode) Catherine Lode | Due in 1 days
- Task: PeaceWiseKids Task 5.3 (Setup complete for Catherine Lode) Catherine Lode | Due in 7 days
- Task: PeaceWiseKids Task 5.4 (Send email to Karen Collum) Karen Collum | Due in 7 days
- Task: PeaceWiseKids Task 5.5 (Deliver teacher's letter to Karen Collum) Karen Collum | Due in 14 days
- Set PeaceWiseKids Enquiry Status to: 6, 5
- Task: PeaceWiseKids Task 5.6 (Setup Complete for Allen Sibley) Allen Sibley

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.

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.

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.

What is a donor journey and why it matters

From First Gift to Lifelong Advocate



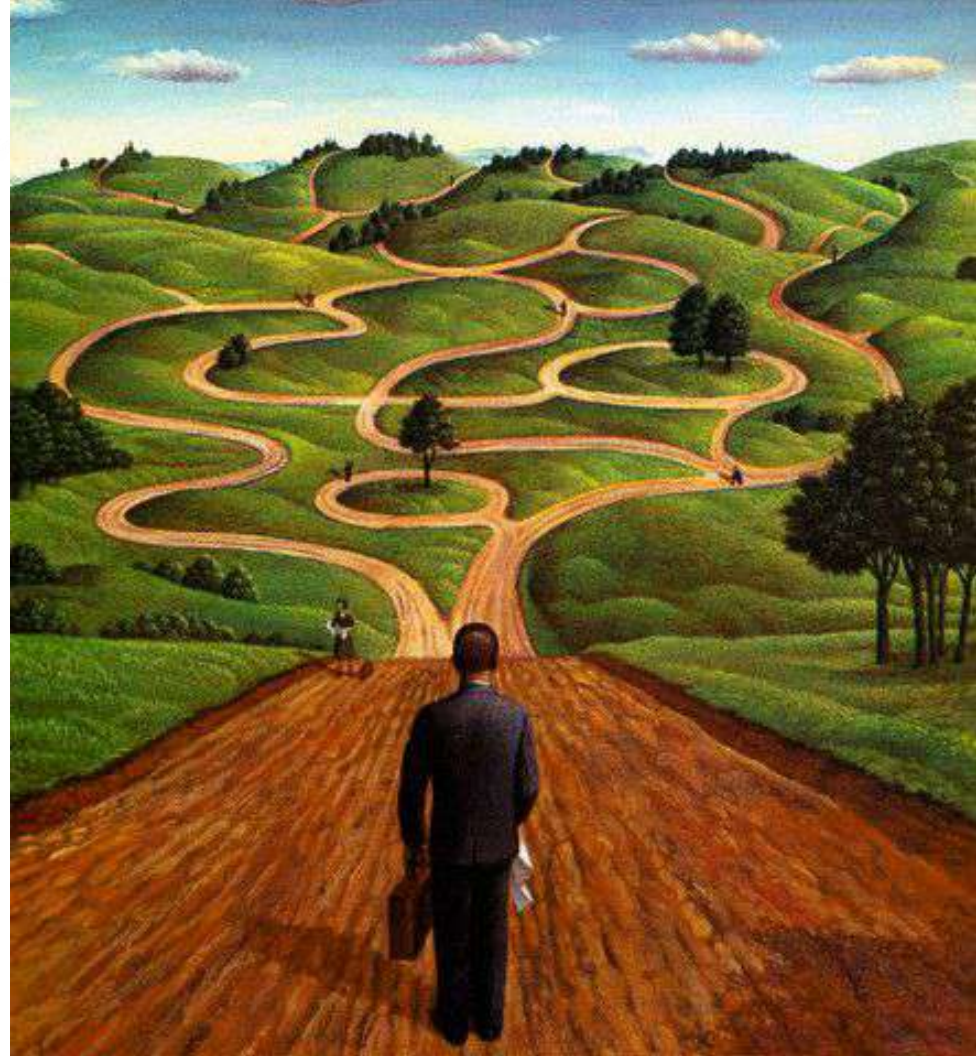
Donors are on a Journey...

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)



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

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**

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

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.

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.

Matthew's adventure

Matthew makes a donation

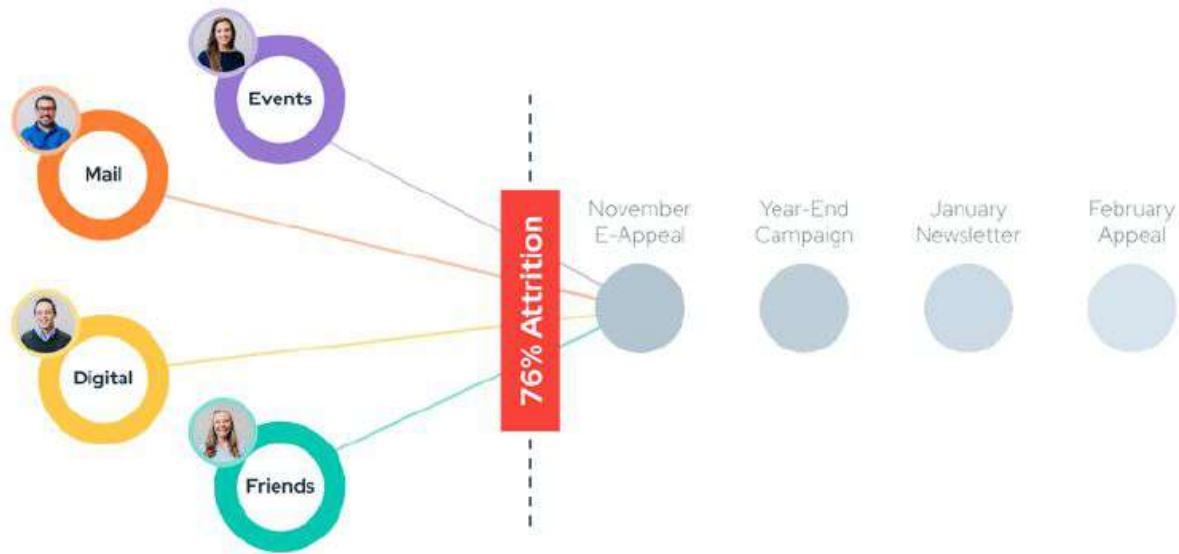
- Receives a thank-you letter.
- Gets a welcome email series with cause info and involvement options.
- Clicks link to explore a program.
- Invited to a panel discussion; attends and meets staff.
- Follow-up call thanks him and asks for feedback.
- Invited to become a monthly giver.



Questions

Is Matthew more generous or passionate than Mary?

Why are these donor journeys and outcomes different?

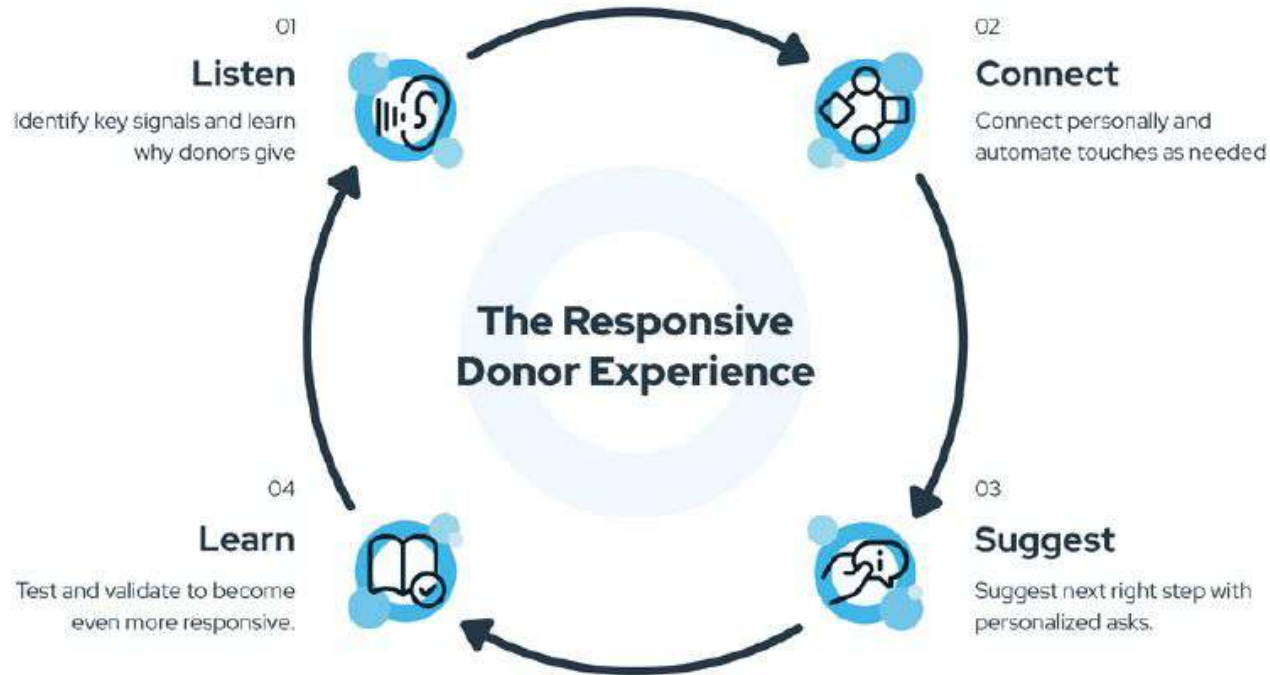


“When someone starts listening, you should say hello, right? When someone asks for more, give them your best. I think of the welcome series as both smart marketing and common courtesy.”

Andy Crestodina, Chief Marketing Officer, Orbit Media

The Responsive CRM Model

The responsive framework



Segmentation: Know Your Donors

Characteristics:

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

Actions:

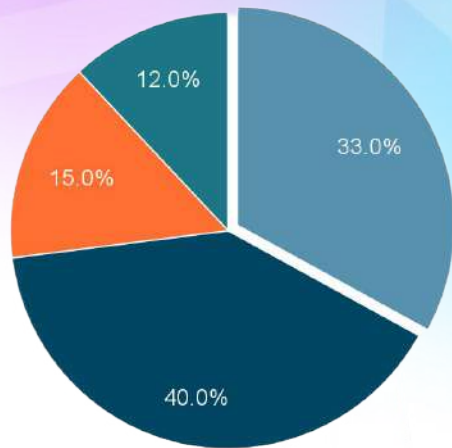
- Segment by passion, giving frequency, or capacity.
- Use CRM to track engagement (e.g., donations, events).
- Tailor campaigns to each segment's interests.

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



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



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.



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



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



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



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



Dynamic campaigns driven by Donor

Stephen



First gift to water campaign



First Time Donor Journey

Jenna



Abandons donation page



Supporter Journey

Shivani



Hasn't given in 13 months



Lapsed Donor Journey

Charlie



Clicks to email & downloads PDF



Engaged Donor Journey

Automation allows us to do this at scale

An automated donor journey:



Personalization + Multi-Channel Communications + Impact Driven



What stage is your organization currently in regarding donor engagement?



Planning a donor journey using human centred design principles

Start with your strategic goals

Project objective statement



*Think about your
whole digital landscape*

TO

Implement
effective
donor
journeys

Communicate
with donors
more

IN A WAY THAT

Utilises
Virtuous

Asks for
specific
projects /
camps

Feeds
back the
impact

Rewards
loyalty

Shows we
are truly
grateful

Streamline
good news
stories

Captures data
according to
event /
involvement

Can be
triggered
for offline
supporters

Close the
comms loop
on impact
reporting

Streamline
thank you

Utilise
the
system

Doesn't lose
the personal
connection
with Peter

SO THAT

Promote
wills and
bequests

Increase
volunteer
engagement

Grow
donations


Convert
once off
givers to
regular

Increase
lifetime
value

Raise
more
funds

Identify and prioritise your personas

Donor Segmentation

 Let's focus on the highest priority segments today.

TOP 3 - PRIORITY PERSONAS (SEGMENTS)



OTHER PERSONAS

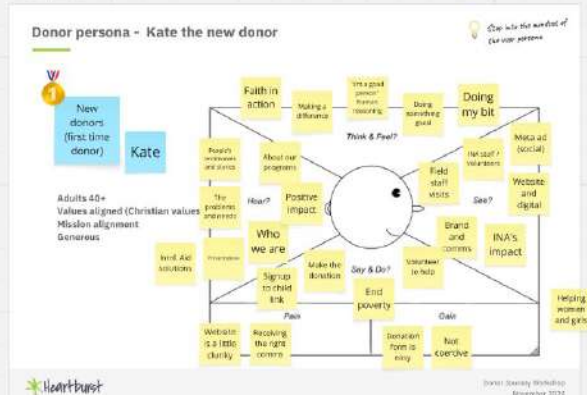
Awareness/
general
interest

Volunteers

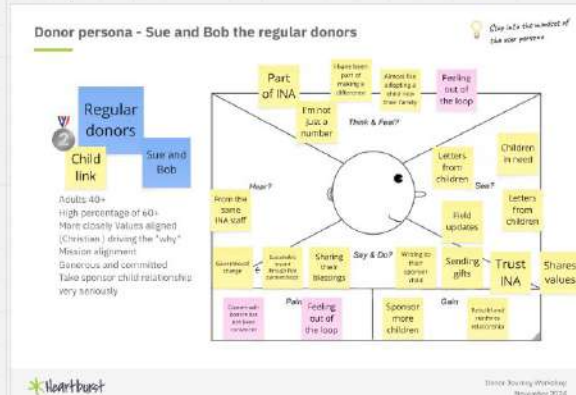
Churches

Unpack the mindset of your personas

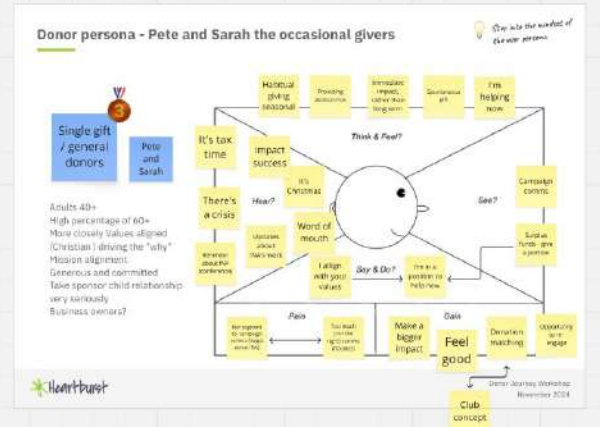
User persona 1



Donor persona 2



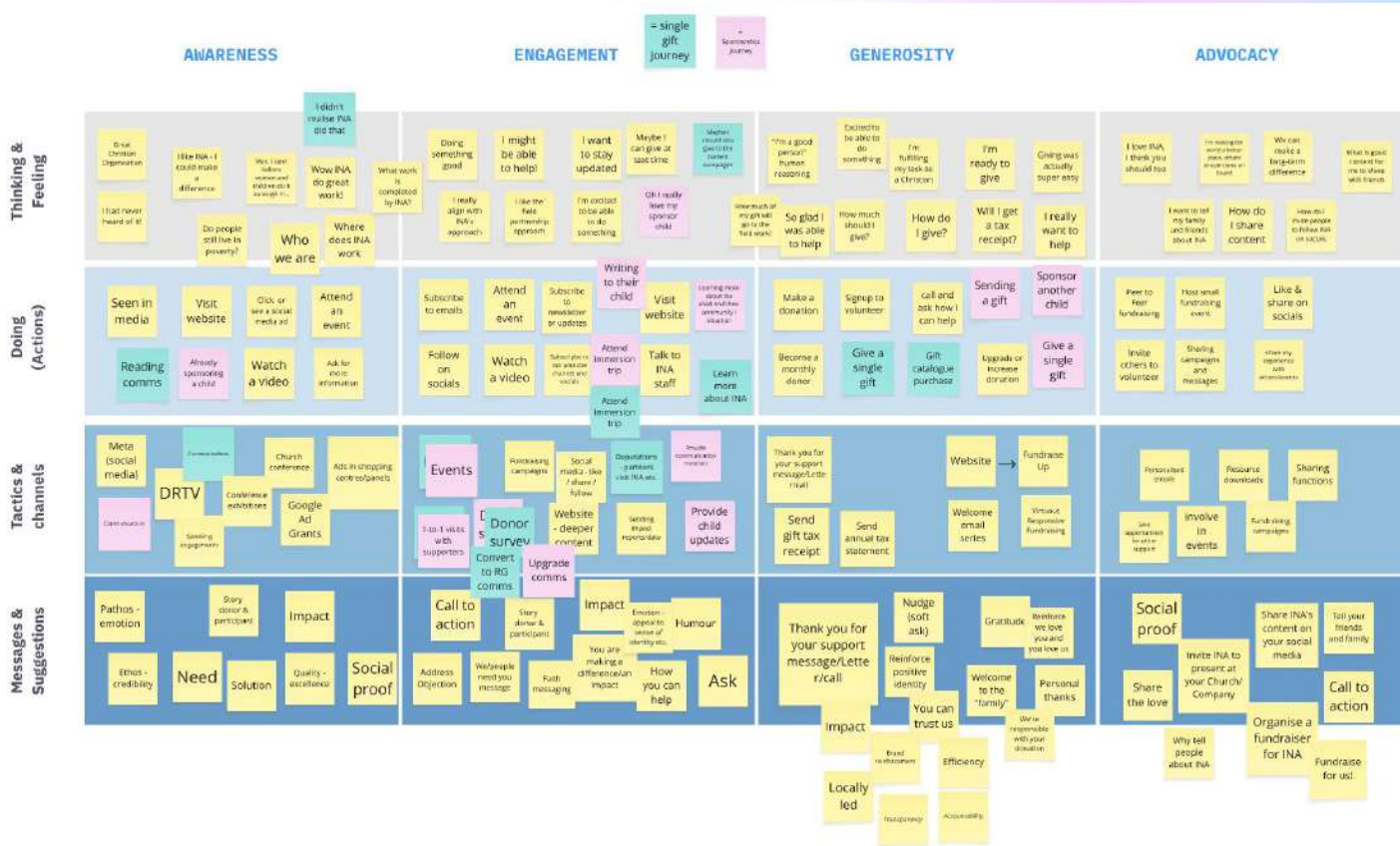
Donor persona 3



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

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

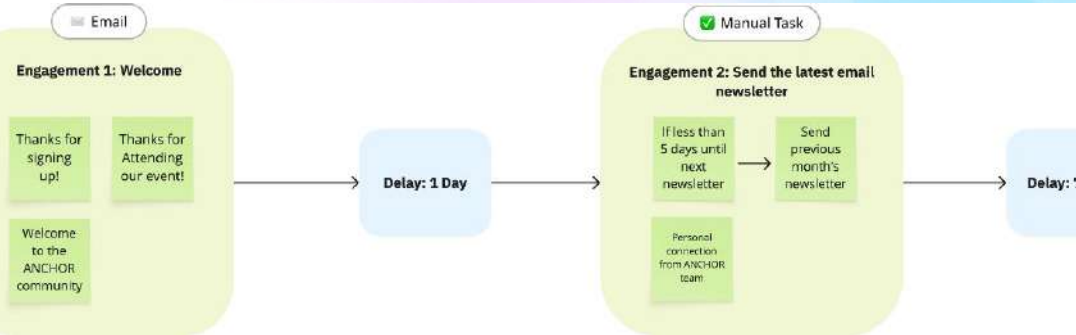
Analyse your donor lifecycle



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





Configuring your donor journey automation

Prepare content and creative

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



Dear Friend,

I'd like to take a moment and thank you personally for your recent gift to Christianityworks.

Your support is helping reach millions of people across 160 nations in 11 languages each week through radio and TV broadcasts, digital channels like YouVersion, online resources, and devotionals that share the life-transforming message of Jesus.

Every time someone like Annabel hears about God's love and grace through Christianityworks, lives are changed, hearts are transformed and eternal destinies are altered forever.

Or, as Annabel put it ...



Christianityworks' messages opened me up to the realisation that I need to stop fighting my own desires and let God do things in my life the way He wants me to do them.

See how you're impacting lives like Annabel's!

And again, on behalf of the countless people like Annabel whose lives will be touched and transformed through your generosity – thank you, thank you, thank you!

Your brother in Christ,

Configure your automation

The screenshot displays a user interface for configuring marketing automation. The main area shows a workflow for 'Nick's Donor Lifecycle' with two columns: 'NONDONORS' and 'FIRST-TIME DONOR'. Each column has a list of actions, including 'Add Tag', 'Delay', and 'Task'. A 'NEW ACTION' modal is open on the right, showing a list of action types.

Search

Nick's Donor Lifecycle
[Dashboard](#) / [Marketing Automation](#) / Nick's Donor Lifecycle

AUTOMATION WORKFLOW | **ENGAGEMENT** | **RESULTS**

NONDONORS | **ACTIONS: 7**

- CONTACTS: 0
- ADD TAG: Nondonor
- Delay 3 days
- Task: Welcome Call
Nick Dubé | Due in 3 days
- Delay 3 days

FIRST-TIME DONOR | **ACTIONS: 4**

- CONTACTS: 0
- Remove Tag: Nondonor
- Add Tag: First-time Donor
- Task: Handwritten Thank You Card
Nick Dubé | Due in 5 days
- Delay 5 days

NEW ACTION

ACTION DETAILS

TYPE

- Delay
- Marketing Email
- Follow
- Tag
- Task
- Organization Group
- Custom Field
- Contact Note
- Email List
- Letters on Demand
- Wealth Data

DASHBOARD

CONTACTS

GIFTS

MARKETING

AUTOMATION

Workflows

Template Library

ONLINE GIVING

REPORTS

EVENTS

SETTINGS

QUERY TOOL

IMPORT TOOL

DATA HEALTH

INTEGRATIONS

Search

New Donor Welcome Workflow

ACTIONS

[Dashboard](#) / [Marketing Automation](#) / New Donor Welcome Workflow

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

Automations



Settings

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



Search




Automation Workflows

[Dashboard](#) / [Automation Workflows](#)


[WORKFLOWS](#) [BEST PRACTICE TEMPLATES](#)


FILTER


Search


[Add a Filter](#) 

EMAIL LIST AUTOMATION WORKFLOW



6/06/2...
LAST RUN



4
CONTACTS



1
STEPS


[VIEW](#) [REPORTS](#) [PAUSE](#) 

NEW DONOR WELCOME WORKFLOW


6/06/2...
LAST RUN


0
CONTACTS


2
STEPS

[VIEW](#) [REPORTS](#) [PAUSE](#) 

[< PREVIOUS](#) [NEXT >](#)

Measure responsiveness through dashboard(s)



Retention



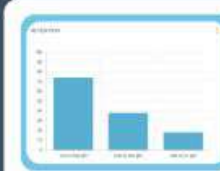
Average Gift



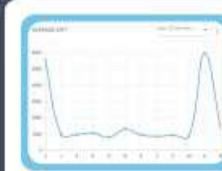
Lapsed vs. New



Total Giving



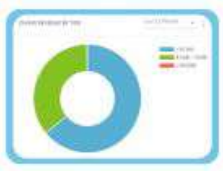
Retention



Average Gift



Lapsed vs. New



Giving by Tier



Digital Engagement



Touchpoints



Web Visitors



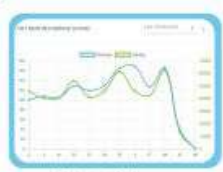
Giving by Tier



Digital Engagement



Touchpoints



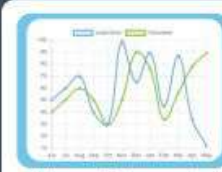
Net New Recurring Giving



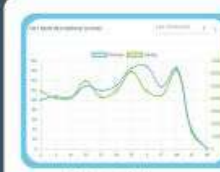
Net Active Donors



Donor Lifetime Value



Non-Financial Data



Net New Recurring Giving



Net Active Donors



Donor Lifetime Value

Getting started with donor journeys

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.



**FREE DONOR JOURNEY
/ CRM CONSULT**





Audience Q&A



Thank you!

**Visit us at our
exhibition stand!**



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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**