DonorDock

Donor Engagement Map

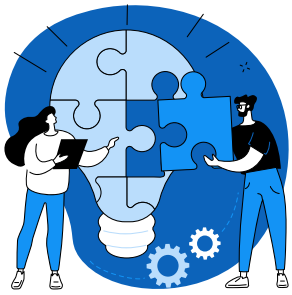
How to use this template

On each page, there is a trigger listed at the top. Below the trigger are different options for how your organization will respond.

As a team, look at each trigger, and discuss the steps your organization will take. Circle or highlight the channel you will utilize for each step, and put any notes about how you will engage in the text box.

There are blank pages at the end of the document for you to define any additional triggers that are relevant to your organization.

Once defined, use these maps as a guide for how to handle each scenario going forward.



Donor Triggers

First Gift

As the name suggests, this is a trigger to engage with a donor when they give their very first gift to your nonprofit. This deserves an individual engagement activity.

2nd Gift

Perhaps even more important to your organization than a first gift, the second gift is significant as it moves a donor from a one-time giver to a **retained donor**. This is a big deal and deserves an engagement touchpoint from your organization.

Major Gift

Your organization will want to define what amount is considered a major gift.

Increased Gift Size

An increased gift size is one that is out of the ordinary for a donor. For example, if a donor's average gift is $50 and they then give a donation of $350, that would be a spike up in giving. This is a great opportunity to reach out to a donor and learn more about what drove them to give more than they normally do. Did something change with their personal circumstances? Did something your nonprofit did resonate with them?

Lapsed Donor

This is a donor that has donated in the past, but not recently. Your organization can define how many months between donations constitutes a lapsed donor.

Donor Birthday

The birthday of the Donor

1st Gift Anniversary

Notification on the anniversary of the Donor's first gift

Actions

Send an Email

Call or Send a Text Message

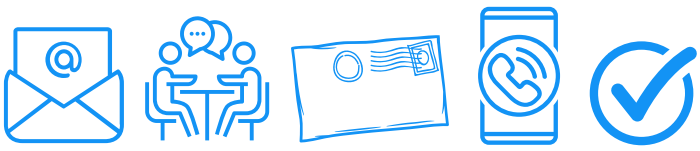
Schedule a Meeting

Mail a Letter

Create a Task

1st Gift

Step One



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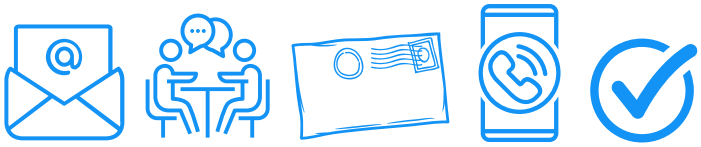

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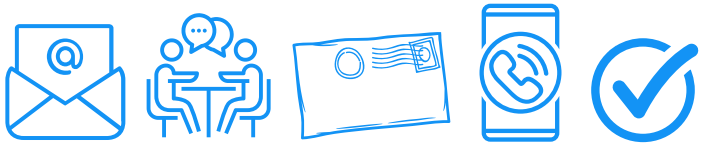

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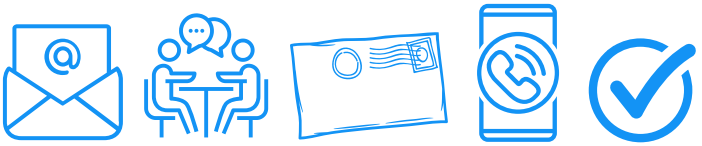

2nd Gift

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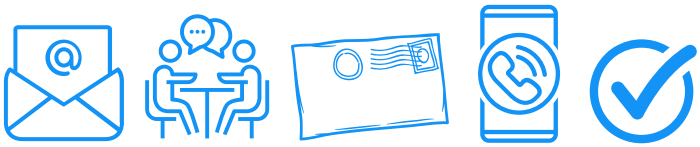

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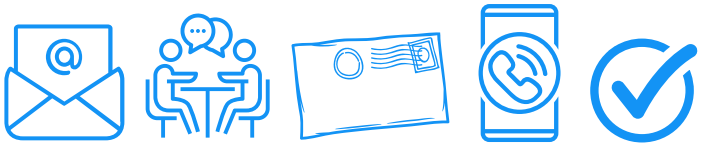

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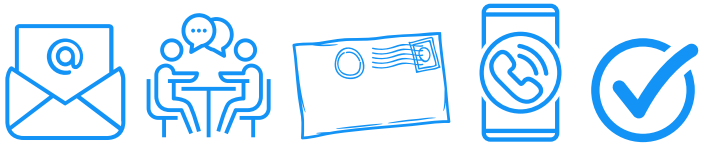

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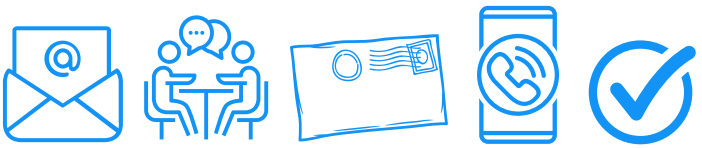

Major Gift

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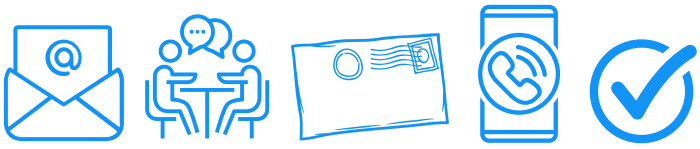

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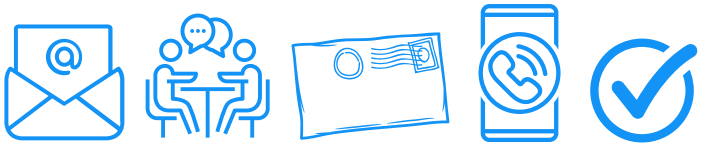

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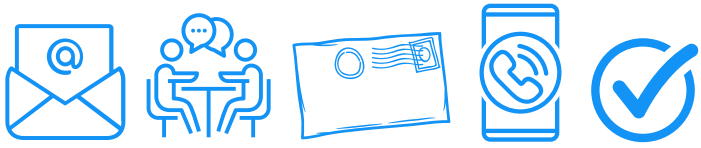

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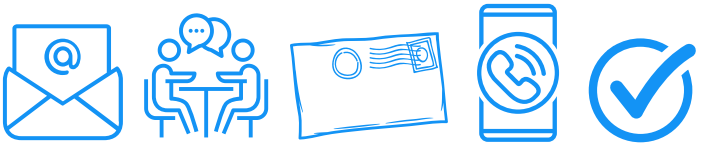

Increased Gift Size

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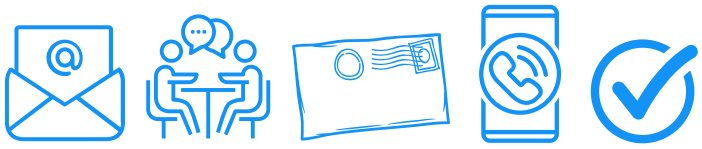

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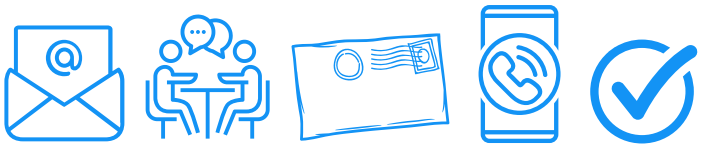

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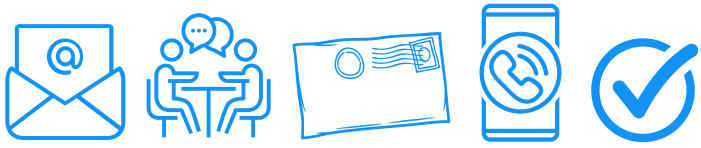

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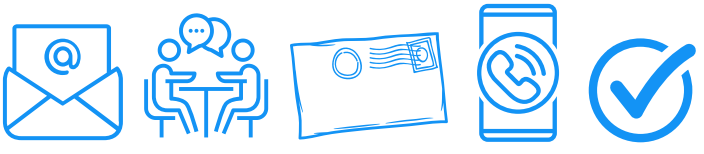

Lapsed Donor

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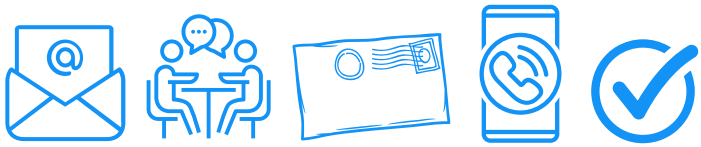

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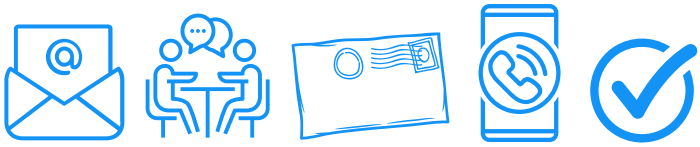

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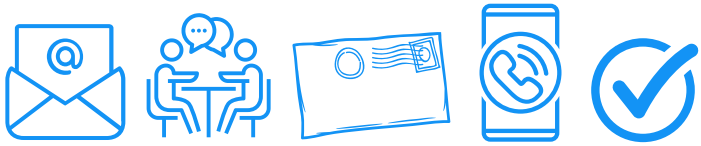

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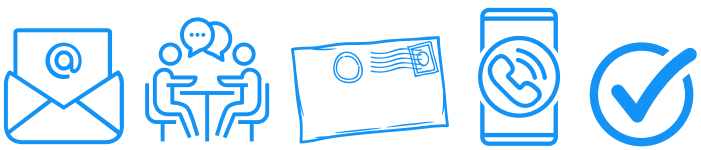

Donor Birthday

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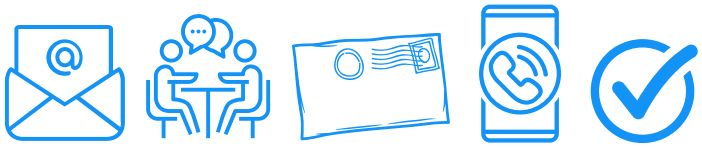

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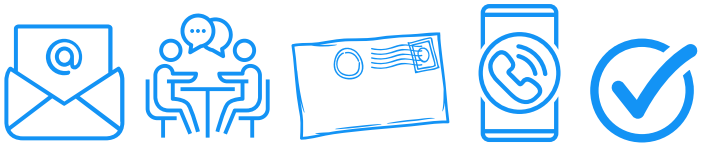

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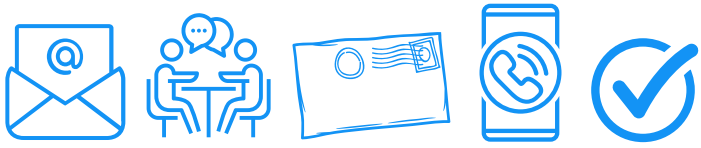

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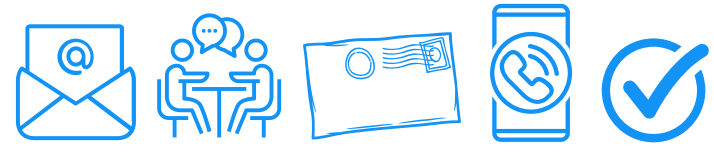

1st Gift Anniversary

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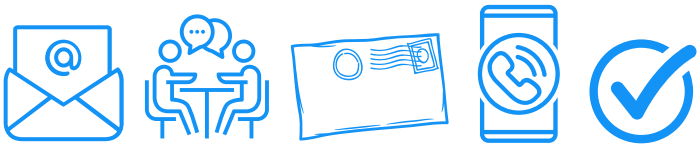

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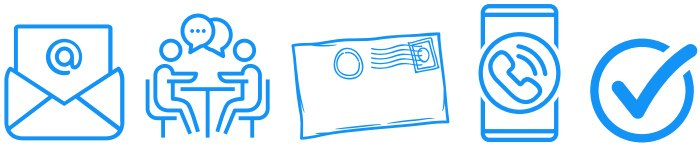

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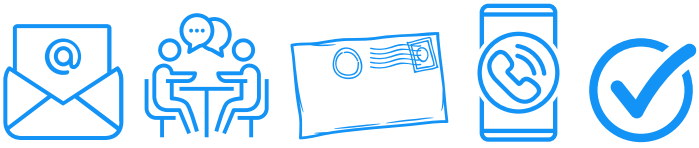

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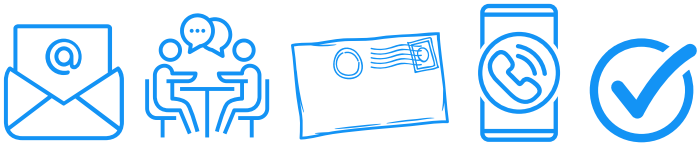

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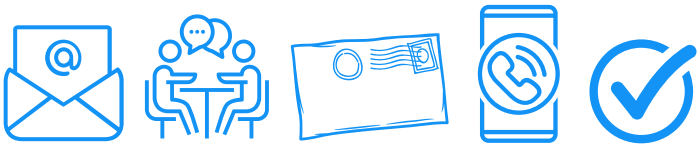

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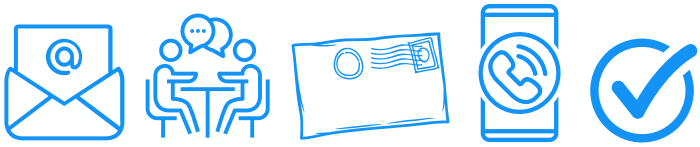

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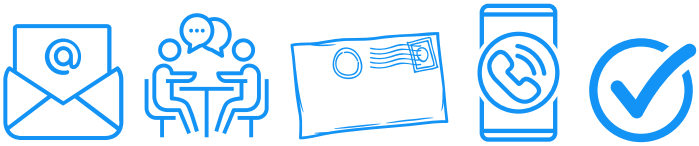

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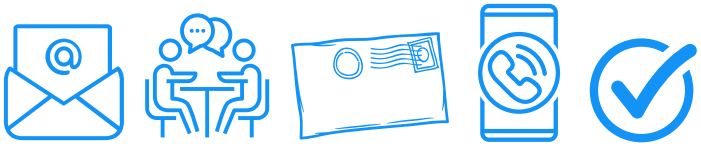

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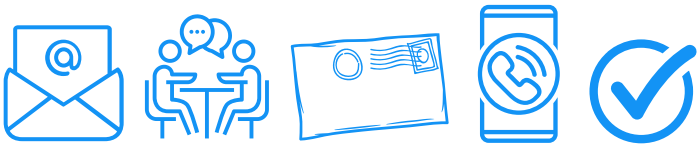

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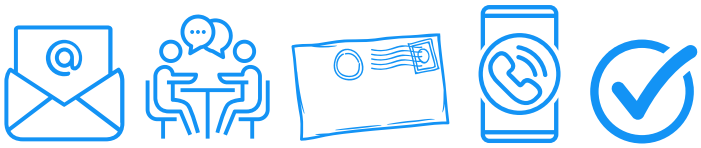

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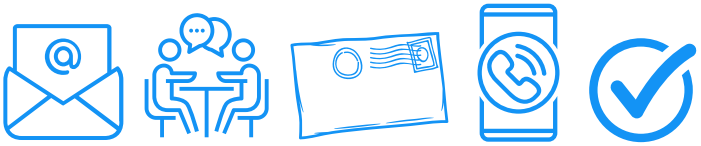

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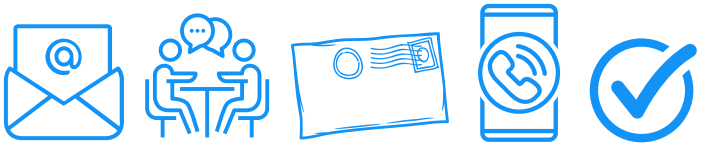

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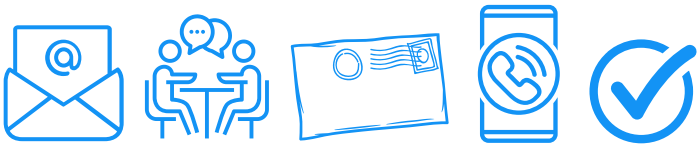

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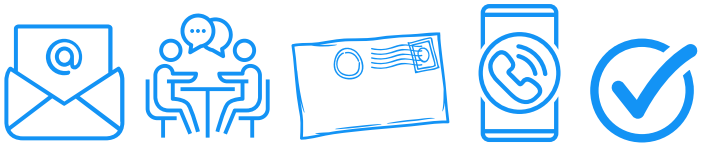

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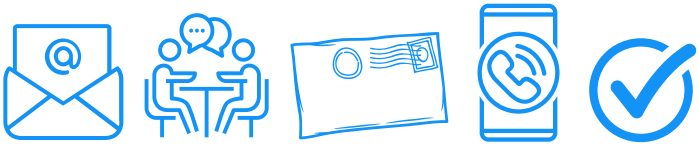

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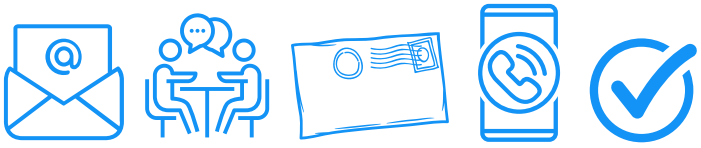

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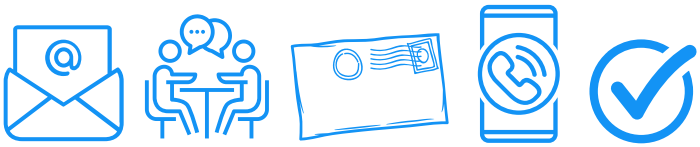

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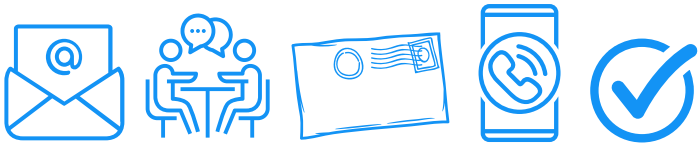

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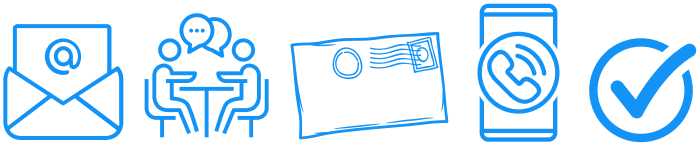

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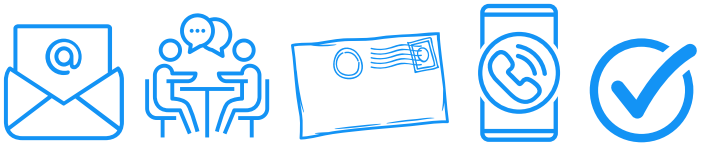

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