



Building a Donor Relationship Management Strategy

Helpful Practices



Building a donor relationship management strategy. Helpful practices. To complement Change the Game Academy's Module 8, this video will speak to detailed practices and tools for developing a successful donor relationship management strategy.

Prospect and Community Research

- Provides insights into donor landscape
- Helps with assessing viable fundraising opportunities
- Supports building strong relationships with donors



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The first practice to highlight is prospect and community research. Prospect research is the process by which fundraisers search for information and data on charitable motivations of potential donors, i.e., prospects, as well as how to center the issues and needs of the community through community research. This information is then used to evaluate whether a prospect has the capacity and motivation to donate to the charity or non-profit in question. Typically, this process is done internally within an

organization, using its own in-house resources, or through external consultants who specialize in fundraising. There are also several external databases that can be used. The benefits of prospect research is that it can lead to valuable insights into the donor landscape, and it can provide an assessment of viable fundraising opportunities and potential future major gifts. It can also assist in building strong relationships with donors.



Donor Relationship Strategy

- Tracking the donor journey
- Communicating with existing and new donors
- Streamlining the donation process
- Identify metrics to monitor donor trends
- Have a straightforward donation process
- Continuous donor engagement

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The second practice we would like to talk about is a donor relationship strategy. A strong donor relationship strategy will involve tracking the donor journey; communicating with new donors and existing donors (donor engagement); streamlining the donation process; and continuing engagement with your donors. In tracking the donor journey, it is important for an organization to identify the metrics they would like to use to monitor donor trends and to find ways to integrate email marketing metrics (click/open rates, leads, etc.) and donor trends (i.e., times of year with highest giving) into their donor strategy. A communications strategy should also be developed alongside a donor relationship management strategy, to ensure that there are streamlined themes and channels in which donors receive information pertaining to their donations. This was also referenced in unit 2A. Additionally, navigation of the donation process should be simple and straightforward, as well as efficient so the donor experiences no barriers.

Continuous donor engagement is important and ensures that donors return to the charity and become long-term supporters. Meaningful engagement and building strong relationships with donors can be done through personalized communications; identifying a number of opportunities to connect on multiple channels; and encouraging face to face interactions.

Donor Segmentation

- Separate donors into sub-groups
- Allows for more personalized communications
- CRM systems useful for donor segmentation



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Finally, donor segmentation is a helpful process for separating your donor base into subgroups, or segments, based on qualities they have in common, for example geography or sectors of interest. Segmenting donors in this way allows organizations to send more personalized communications that reflect the donor's specific interests and priorities. Customer Relationship Management Systems or CRM Systems are a great tool to use in donor segmentation. Video 4 will go into more detail on CRM systems, and your workbook, specifically the 'Learn More' section for Unit 2B, provides more resources on CRM systems.

**This video is part of the
Building Equity: Resource
Mobilization for Impact
training series.**

The series is available online via the Spur Change Resource Library. Made possible in collaboration with JNC Consulting and Change the Game Academy.



Thank you