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New Donor Welcome Series Planning Guide

BY MAUREEN WALLBEOFF

Donor stewardship starts with one thing—the first gift to your organization. The most important time for you to show appreciation and recognition and begin to build a strong, mutually beneficial relationship with your donor is in the first few weeks after an initial donation. The easiest way to do this is by creating a welcome series.

A donor welcome series is just what it sounds like: a series of email messages to welcome a new donor to your supporter community. An email welcome series for new donors helps you pave the way for ongoing engagement with your organization, with the goal of building lasting relationships. For any size organization, a welcome series is an effective cultivation strategy: The read rate on a welcome email is 42% higher than the average email.

Here's what the welcome series should help you accomplish:

1. **Educate new donors about the organization's mission, values, and ongoing projects.** A warm welcome to your community will help donors immediately feel more connected to and invested in your work.

2. **Provide an opportunity for segmentation**. By tracking engagement metrics and using list segmentation, your team can create communications that meet the interests and preferences of each donor.

3. **Ask for deeper involvement.** Whether that's sharing your social media content, volunteering, or making another donation, your new donors are highly motivated to take action.

Think of your welcome series as the launching point for your new donor online marketing strategy, which can provide significant results. According to the Blackbaud Luminate Online Benchmark Report 2021, the average online gift from a first-time donor increased by almost 8% over the previous year, to $146.33. In the same study, nonprofit organizations reported a 10% increase in repeat online donations over the previous year and a 21% increase in online sustainer donations.

Now that you know how effective a welcome series can be at keeping your new donors interested and engaged, you can use this Planning Guide to customize your own.

Contents

Step One: Select Your Message Sender and Email Address

You need to put a real face to your organization. Maybe it's your fundraising director or your annual fund manager. Use a real person and insert their photo in your messages. Here are some reasons why using a real person's name and identity may be beneficial.

Builds Trust and Authenticity

Emails from a real person add a human touch, which often makes the new donor more comfortable and more likely to engage. It may also build trust more effectively than a generic sender name. Messages that appear to be sent by a real person rather than those sent on behalf of the entire organization can enhance donor loyalty and engagement.

Creates a Personal Connection

When an email comes from a real person, it's easier to establish a one-to-one rapport with the recipient. This can be particularly important for welcome series messages because you're trying to engage and onboard new donors.

Improves Open Rates

Email messages sent by a real person often have higher open rates compared to those sent by a generic organization name—27% higher, according to one study. Recipients are generally more interested in emails that appear to come from actual humans.

There's no reason to be concerned about using someone's personal email address. Just create an alias! For example, if you want your development director to be the message sender, you can create a new email address for them that's only used for these welcome series messages.

Our Sender Name:
Our Sender Email Address:

Your IT team or the person who manages email addresses can help you with this step.
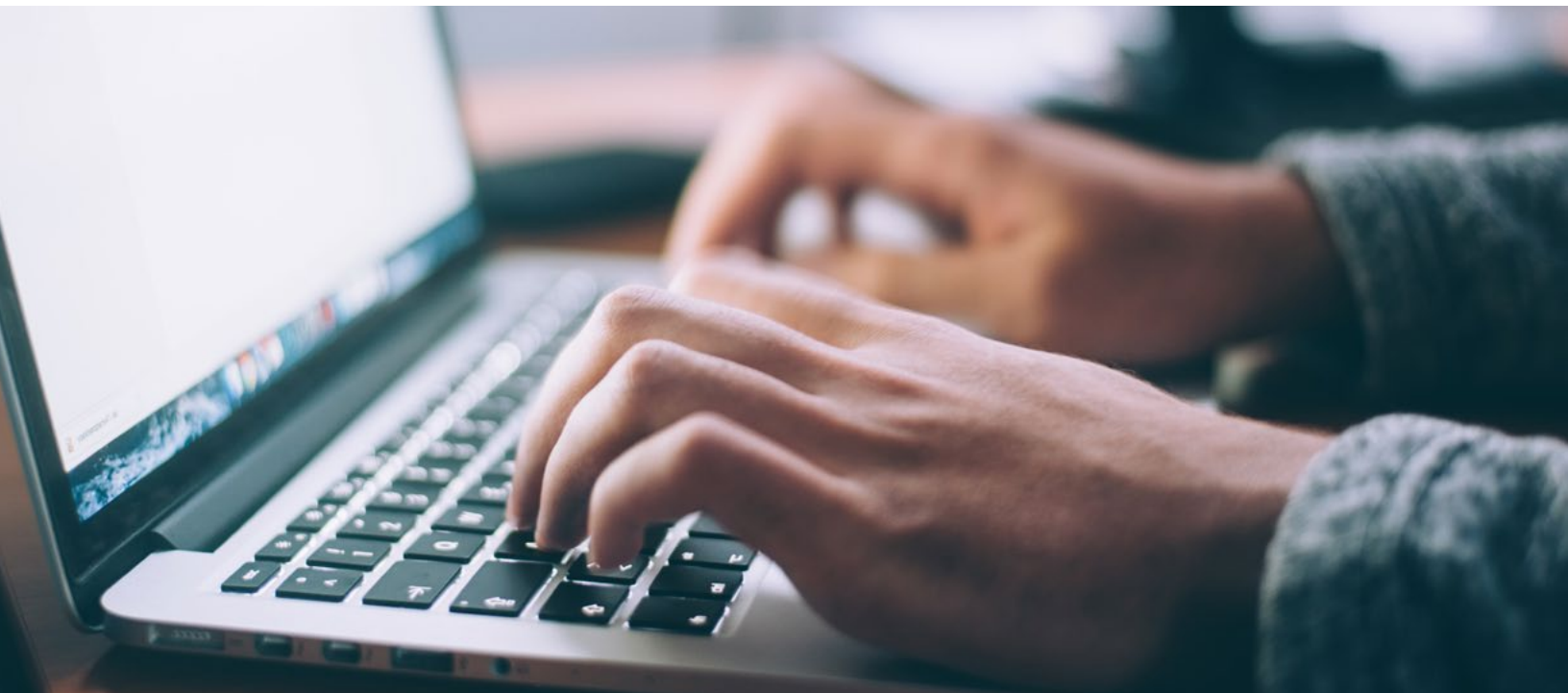
Step Two: Plan Your Message Content

Use this section of the worksheet to gather your written content before you begin to build the messages. You don't need to start from scratch—look back at your most effective email messages over the past 12 months and repurpose that content in your welcome series. Here's a guide for the type of content to write for each message:

✉️ **Message 1**

Donation Autoresponder

A meaningful autoresponder from someone inside your organization sent immediately after a donor's first gift:

• The donor needs to feel personally thanked and appreciated

• You probably already have this message in place, but it may need some TLC

✉️ **Message 2**

Welcome

An email message from an individual at your organization to personally welcome the donor:

• Share some interesting info about the impact of your work

• Ask them to follow you on one social media channel

• Use content from your best-performing past email messages or social media posts

✉️ **Message 3**

Gather Donor Info

• An email message from the same person at your organization that asks for a tiny bit of information about the donor:

• Examples could be their birthday, their interest in your work, and the type of content they want to get from you

• Build a quick three-question survey and add this info to their donor record. Some organizations provide an incentive for completing the survey (we'll send you a sticker!) but it's not required.
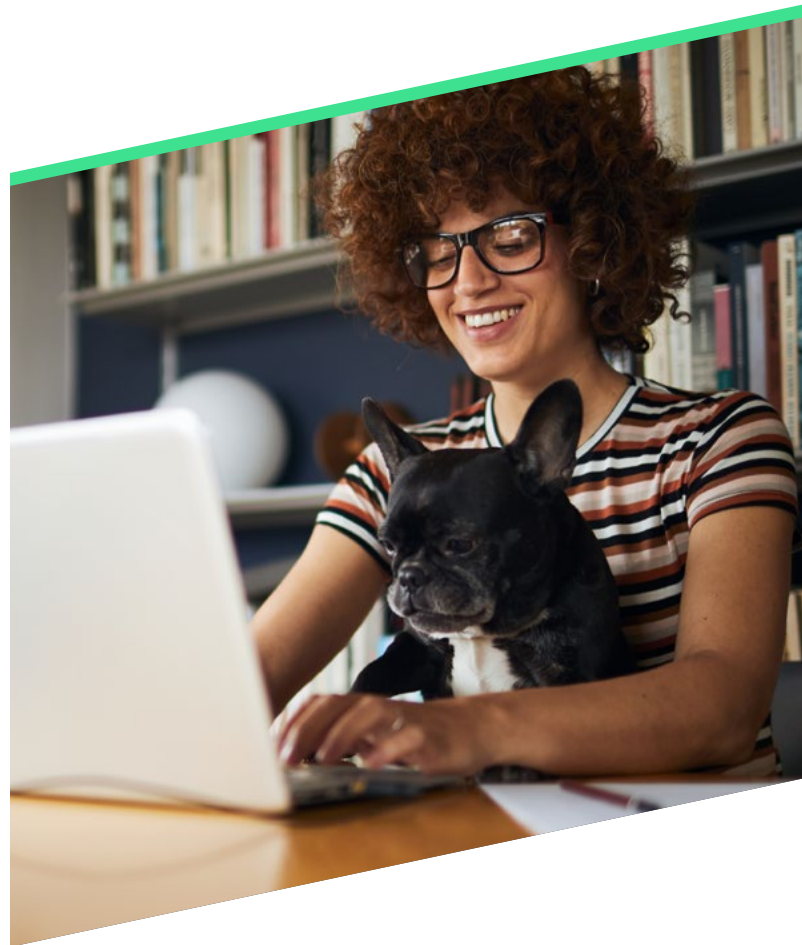
✉️ **Message 4**

Call to Action

An email that asks them to take one new action:

• Sign up for a monthly donation (it's not too early)

• Join a membership

• Sign a petition

• Take an advocacy action

• Become a volunteer

• Register for a webinar or event

• If you have peer-to-peer fundraising, you can promote that in this email, too.

• Share some interesting info about the impact of your work

• Ask them to follow you on one social media channel

• Use content from your best-performing past email messages or social media posts

Now that you have a sense of the focus of each message, add your own content!

✉ Message 1
Donation Autoresponder: *Polish up your existing thank you message*

Your Subject Line

Your Content

Your Closing

✉ Message 2
Welcome: *Can you use a video in this message?*

Your Subject Line

Your Content

Your Closing

✉ Message 3

Gather Info: *Do you need to build a short survey? (Two or three questions max!)*

Your Subject Line

Your Content

Your Closing

✉ Message 4

Call to Action: *What's one thing you can ask your new donor to do?*

Your Subject Line

Your Content

Your Closing

Step Three: Decide Your Message Timing

There can be too much of a good thing: We've all been the recipients of overdone welcome messages—multiple emails in a week that made us hit the "unsubscribe" button. On the other hand, it's not great to space your messages too far apart. We want to set a reasonable, effective pace for your welcome series. Not too fast. Not too slow.

Your ideal timeframe is 20 days to complete the send on these four new donor email messages. Start with the date of that first donation and decide how frequently your new donors will receive their welcome messages once their first gift has been made, using the cadence here as an example of timing that works well.

- **Message 1:** Send immediately after the donation is processed
- **Message 2:** Send 4 days after the gift is made
- **Message 3:** Send 10 days after the gift is made
- **Message 4:** Send 18 days after the gift is made

Use this section of the guide to document the cadence of your individual email messages.

Message Number	How many days after the donation will your messages go out?
1. Autoresponder	Immediately after the donation
2. Welcome	
3. Info Gathering	
4. Call to Action	

Step Four: Pull It All Together

Now that you've completed the Planning Guide, you should be able to create an engaging, effective welcome series for your new donors. Expect to make some tweaks along the way as you learn more about the content your new donors respond to. :

PRO TIPS

1 Build your messages and send them to yourself to be sure they look and behave as expected

2 Set up your system to tag all new donors as recipients of the new welcome series

3 Monitor clicks, open rates, and unsubscribes to be sure your content and timing are working

4 Test ways to use the donor details you received in Message 3's survey to create personalized emails in the future, customizing your appeal and images to topics your donors have told you matter most to them

5 Do your best to suppress these new donors from other emails you may be sending for the first 20 days to prevent collisions. If it's a heavy lift to suppress them, don't sweat it.

About the Author

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Maureen Wallbeoff's proven process to map a nonprofit's strategic and operational goals to the right platforms and business processes has helped hundreds of charitable organizations make good decisions about the systems they use to engage their supporters. She focuses on helping Accidental Techies working at nonprofits to navigate today's complex technology platforms and get a good ROI on their technology investments.

In addition to her work with clients, Wallbeoff has authored multiple guides to nonprofit CRMs and engagement software. She answers questions about nonprofit technology live on LinkedIn, Facebook, and her YouTube channel on Friday afternoons. Based on Cape Cod, Wallbeoff is a sought-after speaker and trainer, leading workshops and video webinars around the country at the Nonprofit Technology Conference, AFP conferences, bbcon, Peer-to-Peer World, and Bridge, and is one of TechSoup's expert trainers.

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