

# Online Donor Acquisition 101



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# Land Acknowledgment

**Our team at CanadaHelps is grateful to have the opportunity to meet and work on many Indigenous homelands across this land we share, Canada.**

As settlers on these lands, it is important to acknowledge that our Vancouver offices are located on the unceded territory of the Coast Salish People, the Montreal offices are located on Kanien'kehà:ka (Mohawk) territory, and the land on which we operate in Toronto is the traditional territory of the Wendat, the Anishinaabeg, Haudenosaunee, and the Mississaugas of the Credit First Nation.

We want to express our respect for the territories we reside in and honour the diverse Indigenous People who have lived and worked on this land historically and presently. We, the staff and leadership at CanadaHelps, are committed to being active participants in reconciliation. We are committed to continuing to amplify Indigenous voices, and learning how our work affects Indigenous People.

## **Vision:**

We envision a society in which all Canadians are committed to giving and participating in the charitable sector, and in which all charities, regardless of size, have the capacity to increase their impact.

## **Mission:**

To inform, inspire, and connect donors and charities, and to democratize access to effective technology and education in the charitable sector.

**For charities,** CanadaHelps builds effective and affordable fundraising technology, and provides free training and education so that all charities, regardless of size, have the capacity to increase their impact and succeed in the digital age.

**For Canadians,** [www.canadahelps.org](http://www.canadahelps.org) is a convenient, safe and trusted, one stop destination for donating to (once, monthly, or gifts of securities), fundraising for, or learning about any charity in Canada.

TRUSTED SINCE  
2000

\$1.6 BILLION  
RAISED

2.6 MILLION  
DONORS

23,000 CHARITY  
PARTNERS

# Agenda

- Goals, Planning, and the Donor Acquisition Funnel
- Optimize Your Website for Acquisition
- Using Donation Forms for Acquisition
- How to Use Donor Data
- Questions & Answers





# What is a Donor Acquisition funnel?



**AWARENESS**

**CONSIDERATION**

**DONATIONS**

**REPEAT  
DONORS**

# Before You Start: Goals & Planning

- **Goal: What is your charity's goal?**
  - Eg. Generate enough donation revenue to rescue and rehome more feral cats.
- **Objective: What are you going to set and measure to decide if you've met your goal?**
  - SMART Objectives: Specific, Measurable, Attainable, Relevant, Time-Based
  - Eg. Grow donor base by X% to account for the costs of growing the program by X% each year.
- **Strategy: How are you going to achieve your objective?**
  - Eg. Target and acquire donors across multiple channels with key messaging that makes the impact of donating clear
- **Tactic: What are the specific activities you'll be doing**
  - Eg. Social media campaigns, email campaigns, designated landing page, fund creation

# Before You Start: Campaign Checklist

- Set Goals
- Define audiences
- Craft key messages for each audience
- Identify major online communication channels
- Define a timeline and budget for each campaign
- Evaluate against Key Performance Indicators (KPIs)
- Iterate, iterate, iterate





**AWARENESS**

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**What stage is the most  
challenging for your charity?**

# Stage 1: Awareness

*Grab the attention of the donors who'll want to support you.*

- SEO (Search Engine Optimization)
- SEM (Search Engine Marketing)
- Social Media
- Other Paid Ads

**AWARENESS**

**Tip:** Ensure the messaging and calls to action on your channels are reflected on your website and landing pages.

# Stage 1: Awareness



**CanadaHelps** ✓ @canadahelps · Feb 24

Did you know at least 1 in 3 Canadian children have reported being bullied? The effects of bullying on mental health can last a lifetime. You can make a difference by supporting charities standing up against bullying. Give today! [#PinkShirtDay](#)



Take Action to Stand Up Against Bullying Today!

References: 1. Canadian Bullying Statistics, Government of Canada

[canadahelps.org](https://canadahelps.org)



**CanadaHelps** ✓ @canadahelps · 23h

At risk and endangered animals in Canada need your help. You can support charities protecting and advocating for wildlife with the Animal Welfare Fund. Give today: [bit.ly/2FH3ExF](https://bit.ly/2FH3ExF) [#WorldWildlifeDay](#)



# Stage 1: Awareness



**Paul Nazareth** @UinvitedU · Dec 1, 2020

Always ❤️ @brittlestar videos, so grateful for this #GivingTuesday message that also encourages giving with @canadahelps to smaller, local, community charities!

Give where you live 🇨🇦🇨🇦



From **Brittlestar** ✓

4

19

40



**Rebecca Diem (is finishing a book)** @kthnxbex · Dec 1, 2020

There are a few ways you can support a festival that is near and dear to my heart:

- ★ Watch the WOTS: OUR STORY video
- ★ Like & Subscribe to our YouTube channel
- ★ Sign up for the @torontoWOTS newsletter
- ★ Support your local indie bookshop
- ★ Donate on @canadahelps #GivingTuesday



**The Word On The Street** @torontoWOTS · Dec 1, 2020

How did Canada's largest free street festival for books & magazines go virtual during a global pandemic? Here's our story, a behind-the-scenes glimpse into the work of a non-profit literary org: [youtu.be/jRxJfs3iq7A](https://youtu.be/jRxJfs3iq7A) #GivingTuesday #GivingTuesdayCA

[Show this thread](#)



1

5



# Stage 2: Consideration

*Give potential donors a reason to donate.*

- Key Messaging
- Imagery & Video
- Optimized Website
- Social Media
- Email Nurture

**Tip:** Try and collect newsletter sign ups from prospective Donors as a secondary CTA (call-to-action), so you can keep emailing them.

**CONSIDERATION**

## Stage 2: Consideration



### IMPROVE MENTAL HEALTH IN CANADA

You can help Canadians access critical support and services during these challenging times. Give to the Support Mental Health Fund today!

[DONATE NOW](#)



# Stage 3: Donations

*Enable your soon-to-be supporters to give to you easily.*

- Website Hierarchy
  - Donate Buttons
  - Consistent CTAs
- Donation Forms
- Landing Pages
- Conversion Tracking

**DONATIONS**



# Stage 3: Donations



**The Black Solidarity Fund**  
STAND IN SOLIDARITY WITH BLACK CANADIANS.



THANK YOU TO P&G CANADA FOR  
DONATING \$1 MILLION



GIVE TODAY TO SUPPORT BLACK CANADIANS

Over the last year, people in the United States and around the world have taken to the streets to march in solidarity with Black communities. They gathered to protest police brutality and anti-Black racism, and to stand up for the value of Black lives.

This is not just an American problem. Canada has a painful history that continues to this day of racism, discrimination, and unequal access for Indigenous People and People of Colour. Black Canadians face unjust and systemic racism. In our schools, Black elementary students are suspended at three times the rate of their non-Black peers.<sup>1</sup> On our streets, a Black person in Toronto is nearly 20 times more likely to be shot and killed by police.<sup>2</sup> In our communities, Black Canadians are 3.5 times more likely to face food insecurity.<sup>3</sup>

Standing with the Black community, the Black Solidarity Fund is an opportunity to stand up against intolerance, prejudice, and injustice, and support charities across Canada focused on the advancement of Black Canadians.

Your donation will help charities supporting and advancing the lives of Black Canadians through social services, arts and culture, mental health supports, and more. When you make a donation today, your gift will be pooled with donations from other generous Canadians to achieve wide-reaching effects and you will receive an instant tax receipt.



**\$1,905,356.38**  
RAISED



**5,142**  
SUPPORTERS



**28 days**  
TO GO



THANK YOU TO P&G CANADA AND THE FOLLOWING P&G BRANDS FOR THEIR SUPPORT

## — DONATE NOW —

Make a donation



### DONATION DETAILS

#### AMOUNT

Donate Now

Donate Monthly

\$ Amount

#### MESSAGE OF SUPPORT FOR THE BLACK SOLIDARITY FUND (OPTIONAL)

#### DEDICATE YOUR DONATION

In memory of

In honour of

No dedication

Next

[Help](#) | [Français](#)

# Stage 4: Repeat Donors

*Turning one-time donors into ongoing supporters.*

- Customized Thank You Messaging
- Impact Statements
- Nurture Programs
- Monthly Donors

**Tip:** Make sure your Thank Yous are as custom tailored as possible (by campaign, dedication information), while still leveraging the automated tools available to you.

**REPEAT DONORS**

# Stage 4: Repeat Donors

The screenshot displays the 'Customizable Donation Forms' interface on the CanadaHelps.org website. The page is titled 'Customizable Donation Forms' and includes a 'Create new form' button. A red box highlights the 'Custom Email Messages' link in the left sidebar. The main content area shows three sections for creating or editing donation confirmation emails:

- ONE-TIME DONATION THANK YOU EMAIL (ENGLISH)**: Includes a text editor with a '1200 characters remaining' indicator.
- ONE-TIME DONATION THANK YOU EMAIL (FRENCH)**: Includes a text editor with a '1200 characters remaining' indicator.
- MONTHLY DONATION THANK YOU EMAIL (ENGLISH)**: Includes a text editor with a '1200 characters remaining' indicator.

Each section has a 'Save' button. The 'Custom Email Messages' link is highlighted with a red box, and the 'Create new form' button is also highlighted with a red box.

**AWARENESS**

**CONSIDERATION**

**DONATIONS**

**REPEAT  
DONORS**

# Website 101


When designing home page:

- THREE seconds to first engage;
  - easy-to-read message- 'who are you & what do you do'
  - compelling video or photo
  - Do donors know they in the right place?
- THIRTY seconds (after initial three) to retain;
  - Bulleted lists
  - Highlight important content
  - Clear calls-to-action

# Website 101

- A further THREE minutes (after thirty second test) to convert to donor;
  - Establish the need your charity answers
  - Prove the impact your charity makes.
- Messaging on your homepage;
  - pitch 70% of your content for new supporters
  - 20% for existing supporters
  - 10% to volunteers
  - Clear CTAs to go elsewhere.

**MOST IMPORTANTLY-** How can visitors support you: Where is your donate button?



**Calls-to-action should be direct, powerful and highly visible. The fewer steps there are, the easier it will be for visitors to donate, sign up for an e-newsletter, or get involved in other ways.**

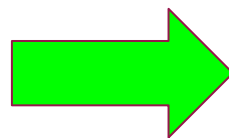
- Donate button specifically;
  - One click to begin donation
  - Accent colour
  - Scrolling header
  - Button leads to embedded donation form
- Remove all barriers for donors!
- Ensure website is mobile optimized

- Same principles apply with all other acquisition channels;
  - Clear CTAs & one click to donate
  - Driving donors not only to your website but page hosting relevant embedded donation form
  - Don't make becoming a donor difficult
- Donation forms are going to be your secret weapon- acquiring donors in one click!
  - Automate donor stewardship tasks to build better relationships with your donors
  - Understand donors & what is motivating people to give





- Looking to fundraise for a specific campaign through email or social media?
- Looking to acquire or convert one time donors to become monthly donors
- Looking to acquire gifts of securities
- Looking to understand which programs your donors are motivated by to give

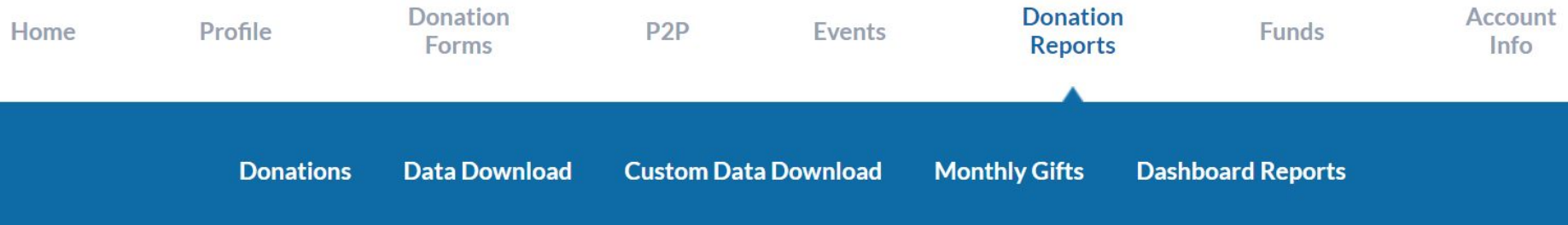


Create a custom form!

Custom forms will not only make it easy acquire donors but great tool to automate steward donorship activities!

(custom thank you, custom mailing opt in, custom question)

# Leveraging donor data to acquire more donors



- See every \$ through every form
- Understand why new donors gave & segment to tailor communications from day one
- Track against goals
- Which campaigns raised the most?
- Which channels were most effective?
- Basic A/B testing
- All this data will guide future acquisition plan & ongoing donor stewardship

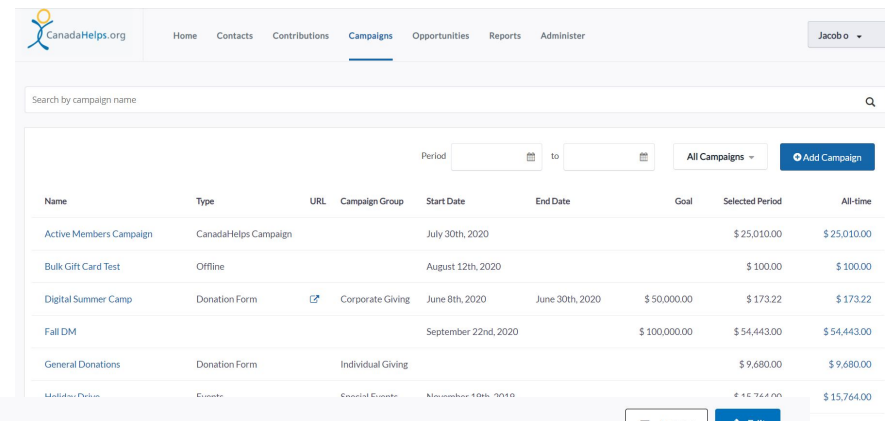


**Is it time for a Donor  
Management System?**

# Donor Management Systems 101

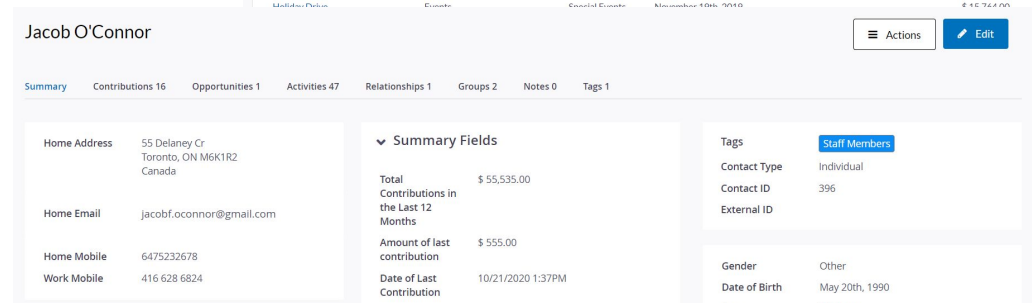
A system in which you store:

- **ALL of your Donor Data (Online/ Offline)**
  - Donor Information
  - Donation Information (Giving History, Method, Total #/\$ of Gifts)
  - Communication Preferences
  - Communication History (Emails, Calls, Meetings)
- **Your Campaign Data**
  - How much was raised?
  - Did we reach our goals?
  - What types are most effective?
  - Who gave?
- **Your Opportunities**
  - Major Gifts
  - Grants



The screenshot shows the 'Campaigns' page on the CanadaHelps.org website. It features a navigation bar with links to Home, Contacts, Contributions, Campaigns, Opportunities, Reports, and Administer. A search bar is present with the text 'Search by campaign name'. Below the search bar is a table listing various campaigns. The table has columns for Name, Type, URL, Campaign Group, Start Date, End Date, Goal, Selected Period, and All-time. The campaigns listed include Active Members Campaign, Bulk Gift Card Test, Digital Summer Camp, Fall DM, General Donations, and Multiple Pledge.

Name	Type	URL	Campaign Group	Start Date	End Date	Goal	Selected Period	All-time
Active Members Campaign	CanadaHelps Campaign			July 30th, 2020		\$ 25,010.00		\$ 25,010.00
Bulk Gift Card Test	Offline			August 12th, 2020		\$ 100.00		\$ 100.00
Digital Summer Camp	Donation Form	<a href="#">🔗</a>	Corporate Giving	June 8th, 2020	June 30th, 2020	\$ 50,000.00	\$ 173.22	\$ 173.22
Fall DM				September 22nd, 2020		\$ 100,000.00	\$ 54,443.00	\$ 54,443.00
General Donations	Donation Form		Individual Giving			\$ 9,680.00		\$ 9,680.00
Multiple Pledge	Event		Event	November 10th, 2019		\$ 15,764.00		\$ 15,764.00



The screenshot shows the donor profile page for Jacob O'Connor. It includes a header with the name 'Jacob O'Connor' and a navigation bar with links to Summary, Contributions 16, Opportunities 1, Activities 47, Relationships 1, Groups 2, Notes 0, and Tags 1. The profile is divided into several sections: Home Address, Home Email, Home Mobile, Work Mobile, Summary Fields, and Tags. The Summary Fields section shows the total contributions in the last 12 months as \$ 55,535.00 and the amount of the last contribution as \$ 555.00. The Tags section shows the contact type as Individual, contact ID as 396, and external ID as 396.

**Home Address** 55 Delaney Cr  
Toronto, ON M6K1R2  
Canada

**Home Email** jacobf.oconnor@gmail.com

**Home Mobile** 6475232678

**Work Mobile** 416 628 6824

**Summary Fields**

Total Contributions in the Last 12 Months \$ 55,535.00

Amount of last contribution \$ 555.00

Date of Last Contribution 10/21/2020 1:37PM

**Tags** **Staff Members**

Contact Type Individual

Contact ID 396

External ID 396

**Gender** Other

**Date of Birth** May 20th, 1990


# CanadaHelps DMS: Key Features

**All of your CanadaHelps data, and your own giving data, in one place!**

## Key features:

- ✓ Pulls in data from all CanadaHelps' products (website, Customizable Donation Forms, P2P, and Events)
- ✓ Record offline and in-kind donations, process payments (one-time, monthly), and issue tax receipts
- ✓ Contact and donation management
- ✓ Opportunity tracking, including grant management and large donor/major gift cultivation
- ✓ Fund attribution (for accounting)
- ✓ Built-in email platform with standard and customizable templates
- ✓ Integration with MailChimp
- ✓ Built-in standard reports (based on fundraising best practices)
- ✓ Task management
- ✓ Support: virtual, phone, email

The image displays two screenshots of the CanadaHelps DMS interface. The top screenshot shows the 'New Household' form, which includes fields for Household Name, Nickname, Email, Phone, and various dropdowns for location and type. The bottom screenshot shows the 'Contributions' form, which includes fields for Contact, Fund, Total Amount, Start Date, Source, Campaign group, Receipt Date, and Payment Processor. Both screenshots show the CanadaHelps.org logo and navigation menu at the top.



**Want to track your  
donor data from the  
start?**

**Book a DMS demo  
with our team.**



# Questions?

# charities@canadahelps.org



@CharityLifeCa



linkedin.com/company/canadahelps



facebook.com/CanadaHelpsForCharities

[Click here](#) to subscribe to our charity emails for the latest news about our fundraising tools and tips!





**Thank you!**