



# How To Use Data & Segmentation To Raise More Money

James Goalder,  
Partnerships Manager



# Your Presenter

**James Goalder** (@Goaldeje)

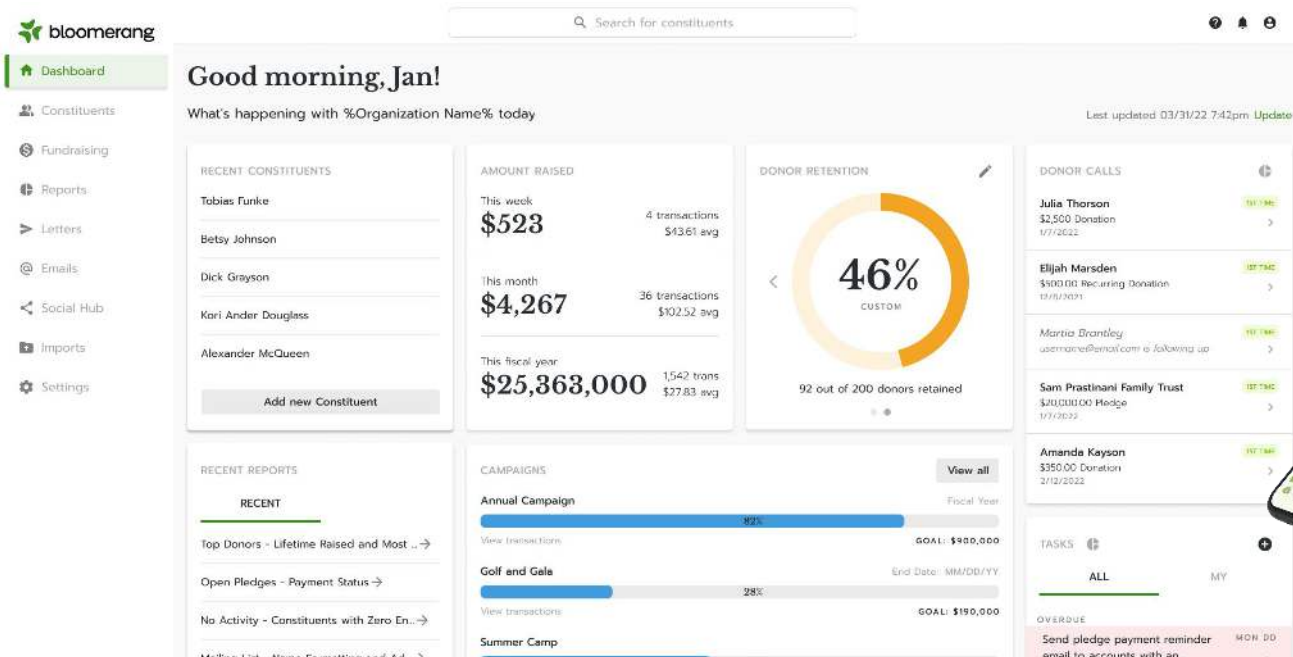
Partnerships Manager, Bloomerang

## Fun facts:

- 1st job: McDonald's Drive-Thru
- **LOVES** to travel
- 4 kids, 2 cats, 1 dog + 3 foster kittens
- Degrees in English and Art History from James Madison U
- Married 26 years this May



**“Putting our donor retention rate in front of us every day has been invaluable. Our retention rate has risen to 70%, and we aim to increase it even more.”**  
-Kristen Westermann, Godparents of Tanzania



The screenshot displays the Bloomerang dashboard interface. At the top, there is a search bar for constituents and a navigation menu on the left with options like Dashboard, Constituents, Fundraising, Reports, Letters, Emails, Social Hub, Imports, and Settings. The main content area is titled "Good morning, Jan!" and includes a greeting "What's happening with %Organization Name% today".

Key metrics and sections include:

- RECENT CONSTITUENTS:** Lists names like Tobias Funke, Betsy Johnson, Dick Grayson, Kori Ander Dougless, and Alexander McQueen.
- AMOUNT RAISED:** Shows "This week \$523" (4 transactions, \$43.61 avg), "This month \$4,267" (36 transactions, \$102.52 avg), and "This fiscal year \$25,368,000" (1,542 trans, \$27.83 avg).
- DONOR RETENTION:** A donut chart shows 46% retention (92 out of 200 donors retained).
- DONOR CALLS:** Lists calls for Julia Thorson, Elijah Marsden, Maria Brantley, Sam Prastinani Family Trust, and Amanda Kayson.
- RECENT REPORTS:** Includes "Top Donors - Lifetime Raised and Most...", "Open Pledges - Payment Status...", and "No Activity - Constituents with Zero En...".
- CAMPAIGNS:** Shows progress for "Annual Campaign" (82% of \$900,000 goal), "Golf and Gala" (28% of \$150,000 goal), and "Summer Camp".
- TASKS:** Lists tasks like "Send pledge payment reminder" and "email to accounts with an...".



# Free Report & Slides



# Agenda

1. Clean data & data segmentation 101
2. Nonprofit stories of segmentation in action
3. The importance of segmenting your communications and employing the personal touch



# Clean data & data segmentation 101: Some tips for success



# Data Hygiene

It's important to develop a data management plan that is consistent with your fundraising strategy.

Even with good data enrichment practices in place, your data quality is still getting worse. Frustrated? Don't be. Instead, be proactive.

1. Get a data quality assessment of your donor data
2. Document your data needs
3. Determine your data gaps

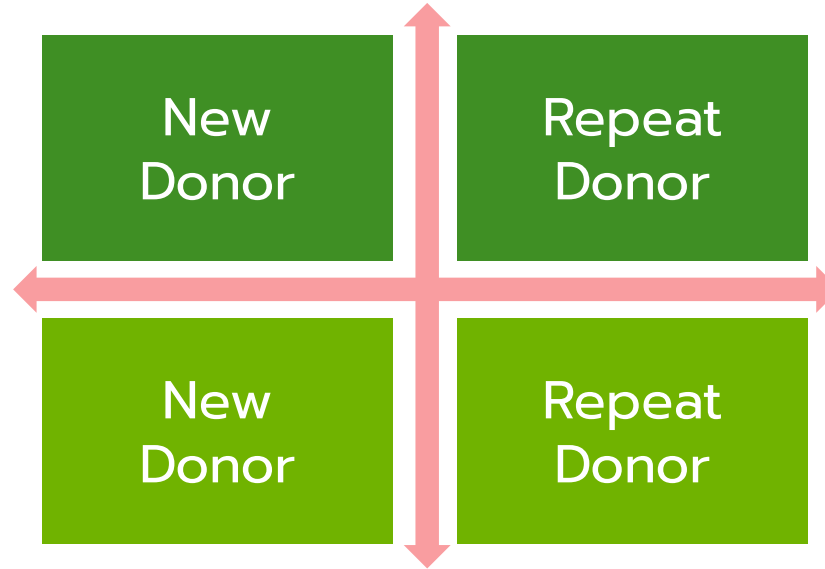
**ACTION:** Once you have clean data it's time to create a plan and start segmenting



# Where to Start with Communication Segments



Above average gift amount



70% of survey respondents who gave \$10K to one organization also made a \$100 gift to another organization. (Penelope Burk)

At or **below average** gift amount

**New donors rarely give at capacity!**





# Our favorite 7 donor segments

While there is an almost infinite number of ways to segment or organize your donors into smaller groups, consider these 7 segments as an easyway to get started.

1. First-time donors
2. Monthly donors
3. Lapsed donors
4. Volunteers who have never donated
5. Donors who have shared feedback, positive or negative
6. Social media followers who interact with you
7. Long-term donors



# Nonprofit stories of segmentation in action



# Year-End Segmentation: Better2gether RVA

Segment	Current	Lapsed
<b>Long-Term Donors</b>	made a gift in 2022 & 2021 (or longer) but hasn't made a gift since Oct 1, 2022	made a gift in 2021 & 2020 (or longer) but not this calendar year
<b>First-Time Donors</b>	made their first & only gift this calendar year (Jan 1 to Oct 31)	made their first & only gift in 2021 but hasn't renewed in 2022
<b>Lapsed Donors</b>		everyone else defined by giving \$25 or more in the past 3 years but hasn't made a gift this year
<b>5K Event Participants</b>	participated in Halloween Hustle 5K in October but didn't donate	

# Year End Segmentation: Long Term Donors

Dear Josh,

Your loyal support means the world to us and is making an impact in helping kids with serious illnesses. I'm hoping I can count on you again with this important ask to help ensure families struggling to care for their medically complex child have the resources they need.

**WE'RE GRATEFUL FOR YOUR LOYAL SUPPORT!**

Yes, I will help! Please use my gift to provide support and care to medically complex children and their families and to support all the work of Better2gether RVA.

**Enclosed is my gift of:**

- \$500 to support a family    \$550 to support a family    \$600 to support a family  
 \$ \_\_\_\_\_ to help as much as possible

*See reverse for gift payment options.*

Donor Josh  
Address  
City, State Zip

**Better2gether**

PO Box 29351 • Henrico, VA 23242  
804-482-1584 • Better2getherRVA.org

## Segmenting Tips:

- Use the same letter but find opportunities to customize to segment.
- Show the donor you recognize them for who they are - loyal, new, important, etc.
- Make donors feel good, feel needed.
- Customize the ask based on their giving.

# Year End Segmentation: Letter Examples

## **First-time new donors**

- We're so grateful you made your first donation this year to Better2gether's mission of supporting kids with serious illnesses. As a small nonprofit, every donation means the world to us which is why I want to ask for your help...

## **First-time lapsed donors**

- Your first-time gift made an impact last year in providing care and joy to kids with serious illnesses.

## **Lapsed donors**

- I'm so grateful for your past donation to provide support to kids with serious illnesses.

# Year End Segmentation: Results

Measure	2021	2022
Mailed Appeals	250	263
Households Donating	33	38 (44)
Response Rate	13.2%	14.4% (16.7%)
Avg. Gift Size	\$392	\$419 (\$525)
Revenue Growth		23% (79%)

*Note: Numbers in parentheses represent totals if including a Board member gifts which were directed away from the year end appeal to support another campaign effort.*

# The Power of a Little Bear: Retention Strategy



SEND AN ASK KID A  
**BEARRY BIG HUG**  
FOR VALENTINE'S DAY

ASK kids just like Brynna, would love a new cuddly friend to hug, comfort them, play with them and maybe even help them be a little braver.

Here's what we need to send every ASK kid a Bearry Big Hug:



**\$25 donation**

That can provide the clinic with snacks for a day.



**Encouraging Note**

Uplifting words can be just as powerful!

Children with cancer face many life-changing moments, and not all of them need to be negative. Let's provide every child in active treatment like Brynna, a Bearry Big Hug.



**Brynna**

Acute Lymphoblastic Leukemia

[Send a Bear Hug](#)

# What storytelling, segmentation, and fundraising tips can we learn from 2020 and what to carry forward





# Success Factors

What we saw work in 2020-2021

Effective storytelling and segmentation played a big role in the organization's that saw success in 2020/2021



1. Don't stop fundraising
2. Segment your communications
3. Double down on stewardship
4. Employ the personal touch
5. You don't need events to tell stories

# Why Donors Stop Giving

2001 study by Adrian Sargeant

**5%** - Thought charity did not need them

**8%** - No info on how monies were used

**9%** - No memory of supporting

**13%** - Never got thanked for donating

**16%** - Death

**18%** - Poor service or communication

**36%** - Others more deserving

**54%** - Could no longer afford

**INSIGHT:** We can make a meaningful impact on the above reasons!



# Why Donors Keep Giving

2011 study by DonorVoice

1. Donor perceives organization to be effective
2. Donor knows what to expect with each interaction
3. Donor receives a timely thank you
4. Donor receives opportunities to make views known
5. Donor feels like they're part of an important cause
6. Donor feels his or her involvement is appreciated
7. Donor receives info showing who is being helped

**ACTION:** What is your thank you turnaround time?



# How to use empathy and emotions to connect to your audience and drive people to make their second gift



# 4 key ingredients to a compelling story

1. **Character:** Who is the story about?
2. **Conflict:** What is your character struggling with?
3. **Goal:** What are they working toward and why?
4. **Change Over Time:** What is the result?



# Segmentation doesn't mean impersonal

Authenticity and personalization are key!



**Our philosophy:** Segmenting shows that you care about the donor; you take the time to know them, to see their involvement, and to **communicate with them the way they want** vs a blanket-approach. Takes staff time but it's an investment with return!

# 4 tips for stewarding each donor segment



Develop  
message  
themes for  
each segment



Develop  
communication  
tracks



Mix  
things up



Get your  
board & CEO  
involved



# The personal touch works

Personal emails + video

## Did you know?

Bloomerang has native integrations with Gravid and Thankview to help nonprofits add a personal touch.



[GMAIL](#) [COPY LINK](#) [f](#) [in](#) [t](#)

Thank you Steven!





# Wrap Up

1. Ensure you have clean donor data
2. Segment your appeals
3. Use empathy and emotions in your storytelling
4. The personal touch works





Donor management software that nonprofits actually love to use.

The donor database that thousands of nonprofits trust



Learn More

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[https://bloomerang.co/learn/demo-live/?utm\\_source=webinar&utm\\_medium=slide&utm\\_campaign=nlc\\_webinar&utm\\_content=20231101](https://bloomerang.co/learn/demo-live/?utm_source=webinar&utm_medium=slide&utm_campaign=nlc_webinar&utm_content=20231101)

# Questions?

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