

# Your Monthly Donor Road-Map

Starting a monthly donor program does not have to be scary. It is not complicated. If you take this Monthly Donor Road Map and follow the Step-by-Step directions, you'll be at your destination in no time! The key is, you have to get in the car and start driving!

## STEP 1: →

### ASSIGN THE "DRIVER"

There can only be one driver in the car. You can delegate part of the trip preparation. You can even have someone with you helping navigate when in the car, but you have to be responsible to get the monthly donor car moving and on track so you can actually get to the destination, ensuring everything goes smooth along the way.

## STEP 2: START YOUR ENGINES

Put the key in the ignition and start. This is really crucial. Many people will delay the start for whatever reason, but it's only hurting your sustainable revenue. If you don't start, the trip will always take longer and you may never get there. Trust me, you'll be happy you got on the road.

## STEP 3: CREATE A NAME FOR YOUR PROGRAM

Take an hour. Pull in a few people you trust, who know the organization and the work you do. Brainstorm about a few options for a monthly donor program that you know you can live with for a very long time. Come up with a few names, then choose and move on. This should not be a very long process.

## STEP 5: THINK OF AMOUNTS YOU'D LIKE TO ASK FOR

Specific ask amounts help the monthly donor envision what you can do with their gift. Look at what you're using for your other fundraising. What does it cost a day, per child, per animal. How can you cut your needs into small morsels. Start with \$5 or \$10 a month and go up from there. Here is an example to get started: One \$10 dollars a month (or as little as \$0.33 cents a day) to help XYZ foundation end child hunger in Los Angeles.

## STEP 4: ADD MONTHLY GIVING TO YOUR ONLINE DONATION PAGE

The key with monthly giving is that it should be easy for the donor to find. So add the recurring or monthly giving option to your single gift donation page. If the donor gets there, driven by your activities, he or she will be able to consider giving monthly right then and there. Virtually every system has this option now built in, you just have to 'activate' it and make sure it's showing up on your page. Remember, test it before you go live!

## STEP 6: CREATE A MONTHLY DONATION PAGE

To promote your monthly donor program, it's essential to have a special monthly donation page in place. Again every donor base system or online payment processor now has the recurring giving option built in, so create a special page and customize it with your look and feel. Incorporate the name you chose in Step 3. Note: This particular page ONLY offers the monthly giving option, no single gift option. Remember, always test it before you go live!

## STEP 7: CREATE AUTO-RESPONDER

Most systems require you to create an auto-responder that pops up as soon as the donor submits the monthly gift online. Build in your logo, your monthly donor program name and your contact information and test it before you go live with the program. Make sure it looks exactly the way you'd like your donor to see it.

## STEP 9: CREATE A THANK YOU LETTER

No matter how monthly donors came on board (online, mail, phone, event) always send a hard copy letter in the mail. The donor will hold on to this. Again, make it as warm and fuzzy and appreciate as you can make it, and make sure it goes out within the first week of them joining. This will basically include the same information as in the thank you email message and don't forget the contact information - that is key!

## STEP 8: CREATE EMAIL THANK YOU MESSAGE

In addition to the auto-responder, most systems generate an email message that's sent right after the submission. Make this as warm and fuzzy as you can make it. Include a story to make the new monthly donor feel really good about joining this program. Ensure that the monthly gift amount, start date and contact information is included. Just in case they have any questions or would like to make changes. Make sure it's signed and make it as close as possible as if you sat down and wrote the donor a personal message from your own email account. Remember, test it before you go live with the program.

## STEP 10: LINK FROM HOME PAGE TO MONTHLY DONATION PAGE

You've created the online pages, now link to it from your home page. Typically this is as simple as adding it to your pull down menu of ways to give. You can create a button "Donate Now and Give Monthly" if you'd like to make it stand out even more. Now, you are ready to go live! If you're really daring, consider taking over the home page with a direct link to the monthly donor page.

## COFFEE

NOW IS A GOOD TIME TO STOP & GET A CUP OF COFFEE. YOU'VE EARNED IT! YOU ARE READY TO GO LIVE!

## STEP 11: CREATE FIRST EMAIL MESSAGE WITH STORY & ASK FOR MONTHLY DONATION

You will only start generating monthly donors if you ask. So it's crucial to start asking. Typically because of the resources involved and the number of email addresses organizations have, starting to ask online is the easiest. You can directly link to the monthly donor page you created earlier. So, find a story of a person, client, child, animal that the donor can help and create an email appeal with at least three links to your monthly donor page. Don't get distracted by thinking you have to ask for single donations. The strongest email will have just that ONE ask, give monthly. You can always ask for single donations again the next time. If you like to make your life easy, make sure to include your in-house audiences your board, staff and volunteers. That way everybody will know about the program too.

## STEP 12: CREATE REMINDER EMAIL TO FOLLOW UP

A tactic that works very well these days is to send out the same message to the non-opens from the first time. Just add a short message on top of it, something like "I hope you had a chance to read the story about (XYZ Program). In case you haven't had a chance yet, here it is again. Thank you for your support!" And then don't forget to sign it. Reminders work. And of course, once you realize what the first email generated, you can add multiple emails to the series. More asks generate more monthly donors.

## STEP 13: CHARGE MONTHLY GIFT

Once you generate some monthly donors, make sure that the payments get charged. Some systems require you to do something so make sure that you know if that's the case or if it's done 'automatically'. It's crucial that the monthly gift gets charged right away.

## STEP 14: CREATE FLAGS SO YOU CAN EASILY TRACK YOUR MONTHLY DONORS

Having a flag in your donor base and a monthly donor segment in your email program will help you with future campaigns and ongoing cultivation and upgrades.

## STEP 15: ADD MONTHLY DONOR TO YOUR DONOR BASE

Some systems will 'automatically' add the monthly donor to your donor base. I recommend always doing a visual check to ensure the system is not generating a duplicate record and to ensure it's setting up a start date and flags the record. If it's done automatically, you can typically get an email sent to you by the system to let you know someone made a recurring gift. I recommend then checking the record and making sure it's all correct. If you do this now, you don't have to worry later.

## STEP 16: ADD PAYMENT TO DONOR BASE

The same applies for automatic monthly payments going in. Sometimes you have to 'commit the batch' or verify the payments before they get processed, so check your system and make sure these payments are actually processed and going on the record. I also recommend setting up coding for monthly payments so you can immediately see if a payment is missed. At a minimum make sure you have your payments tracked by one code for the fiscal year so it's easier for reporting later.

## STEP 17: GENERATE REPORT & SHARE RESULTS

Once you start generating monthly donors, make sure you tell others about it. Give regular updates. And whenever you share results, annualize them. In other words 10 new monthly donors at \$24 a month are generating \$2880 a year! You'll be amazed at how impressed others will be. And don't forget to ask others to share the word about monthly giving so it spreads!

## STEP 18: YOU'VE REACHED YOUR DESTINATION

## BAKERY

NOW CELEBRATE BY REWARDING YOURSELF WITH SOME SWEETS. GRAB SOME CAKE, A COOKIE, WHATEVER YOUR HEART DESIRES. YOU'VE EARNED IT!

## Meet the Author



Erica Waasdorp, President of A Direct Solution, lives and breathes direct response and fundraising and can be considered a Philanthrophyolic. Building partnerships and trying to find the best solution for members and donors and thus clients' needs are what Erica does best. Her multi-lingual skills and multi-cultural experience are of added value to those clients interested in raising money internationally and her experience in monthly giving has given her an edge for those clients who are ready to embark on this way of giving.

Erica Waasdorp started A Direct Solution in December of 2003 with more than twenty years of experience in direct marketing, from both sides of the desk, on the client side and the agency side. She has since worked with numerous non-profit clients on and off-Cape as well as internationally.

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