

From Updates to Engagement

Donor Communication That Drives Retention





Housekeeping

- ? **Questions** → Drop them in the **Q&A box** at any time.
- 💬 **Chat** → Watch for **helpful links, quick polls** and **casual conversation**.
- 🎉 **Reactions** → Show us how you feel. We love seeing your engagement!
- 📊 **Polls** → We'll launch a few during the session — jump in when they appear.
- 🔄 **Replay** → You'll get the **recording** after the webinar.

FREE DOWNLOAD

What NOT to do at your next event

A practical look at common pitfalls across event design, marketing, accessibility, donor experience, follow-up and more.

Avoid critical mistakes at your next event by:

- Anticipating failure points before they happen
- Streamlining tech and onsite operations
- Ensuring your event is genuinely welcoming
- Committing to finalized deadlines



Presenters



HOST

Amy Truong

Lead, Member Growth
she/her

Give Lively



SPEAKER

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SVP of Customer Experience
she/they

Give Lively



GUEST SPEAKER

Elizabeth Hansen

Managing Director
she/her

Texas Archive of the Moving Image

Nonprofits over-invest in acquisition and under-invest in the donor experience.

**Great donor service is a retention
and revenue strategy.**

About Kelsey



SVP, Customer Experience – Give Lively (since 2019)

10+ years in customer service – **team-building** and agent training

Previously at Casper and KindBody – **built training programs**, trained 50+ agents and store staff, onboarded teams onto customer service software like **Intercom**, **Salesforce** and **Kustomer**

Worked with hundreds of **nonprofits** on product navigation and donor service

Why donor communication is a value driver

Most donors leave because the relationship failed – not the mission.

Retention lives in what happens between asks.

5–10×

more expensive to acquire than retain donors

40–45%

average donor retention rate

Most donors don't return after the first gift.

A story from my nonprofit experience

Letting the experience slip through the cracks

“I don't know — I'm just a volunteer.”

She wasn't wrong. She just wasn't prepared.

Your worst experience

Recall a recent poor experience — in person or online

Did it change your opinion of the brand?

Did you go back?

We remember bad more vividly than good — negativity bias.



What world-class brands actually do

Apple and Google don't just create good experiences.

They obsessively eliminate bad ones.



Apple's APPLE framework

- A** — Approach with a warm, personalized welcome.
- P** — Probe to understand what they truly need.
- P** — Present a solution that fits their needs.
- L** — Listen and resolve; check for satisfaction.
- E** — End with a fond farewell and an invitation to return.



Google's guiding principle

“Focus on the user, and all else will follow.”

Swap “user” for “donor.”

Three principles for the donor journey

1

Design every stage for how the donor feels — not how the organization operates.

2

Remove friction that makes donors quietly disengage.

3

Create moments worth remembering — not just transactions worth completing.

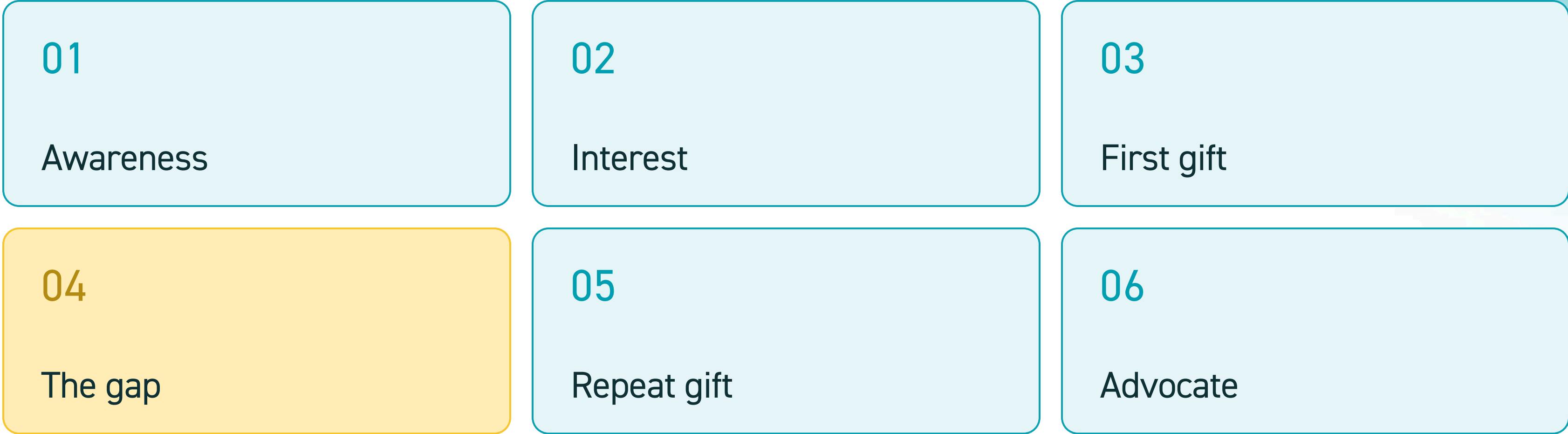
The journey never really ends.
Every interaction builds or spends
relational capital.

The donor's cumulative experience is your brand.

Member Spotlight

Live Q&A with Elizabeth Hansen

Mapping the donor journey



Three questions to ask yourself

Awareness

Does your first impression invite curiosity – or confusion?

Interest

Can someone learn more without having to give first?

First gift

Do they feel seen – or processed?



The gap — where most journeys break

Acknowledgment

Timing and tone

Non-ask communication

Impact updates, check-ins, mission moments

The three Cs

Consistent · Clear · Credible



Where journeys break down

The moment after
the first gift
Silence

The week after an
event
Nothing

The months
between
campaigns
Absence

When a donor
reaches out
"I don't know."



Loyalty & advocacy

Repeat gift

Did you show what the last gift did — before asking again?

Advocate

Have you given the language and the opportunity to bring others in?

Setting the service standard

Define it in one sentence.

Train to it.

Signal it to donors.

SLAs and CSAT

48 hours

Thank-you

24 hours

Inquiry response

CSAT. Are donors actually feeling what you intend?

Service → engagement

Communication as a service channel

- Build anticipation, not just awareness
- Social media as a relationship tool – not a broadcast channel
- Find the frequency line: enough vs. too much

Reinforce the standard through updates Prevent the “just a volunteer” moment

- Pre-event briefing: mission in one sentence, talking points, escalation protocol
- Give volunteers two approved phrases: warm greeting + graceful handoff
- Role-play scenarios before doors open

Every update is a service moment

Routine or not — every update is a chance to deepen commitment.

Walk it yourself: subscribe, donate, register, read every touchpoint.

Move from “reporting to donors” to “**inviting donors into the story.**”



When things don't go as planned

Hard moments are opportunities.

Honest communication during difficulty strengthens relationships more than smooth ones.

Donors expect imperfection. They don't expect transparency. Surprise them.

The honesty–confidence balance

What to do

- Acknowledge.
- Explain what you know.
- Share what you're doing.
- Give a timeline.

What not to do

- Go silent.
- Over-explain.
- Over-promise.

Scenarios & responses

Technical difficulties

→ Acknowledge, offer a workaround, follow up

Cancellation / venue change

→ Lead with empathy, give clear next steps

Fundraising shortfall

→ Be honest about the gap; make a specific ask

Donor complaint in person

→ Listen fully, don't defend, thank, escalate

Staff scripts for hard questions

Q. What happened to the funds from last year?

Q. I heard your organization is struggling financially.

Q. Why isn't the event happening as planned?

Takeaways

Retention is a relationship problem, not a mission problem.

Donor experience deserves the same rigor as world-class customer experience.

Hard moments are trust-building moments — if you show up honestly.



Live Q&A

Panel Discussion

In closing

Thank you for joining us! 🌟

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Join Give Lively Grow

Receive one-on-one strategy sessions, practical tools and guidance to level up your fundraising and meet your goals.

Sign up for our Breakthrough newsletter

Receive timely advice, actionable resources, nonprofit wisdom and fundraising product updates.

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Thank you!