

New Donor Retention Timeline

This timeline shows how and when to interact with first-time donors to ensure they stay engaged with your nonprofit.

Upon Receiving an Online Gift

- ☐ Share your appreciation by having first-time donors directed to a follow-up page as soon as the transaction is completed.

The Same Day

- ☐ Make sure all donor and gift data is in your donor management system including as much data points as possible.

Within One Day

- ☐ Thank your donor in a brief compelling email.
 - Mention the campaign or specific project your donor is supporting
 - Include a receipt
 - Send it from your executive director or star program staffer

Within One Week

- ☐ Reinforce your thanks with a warm follow-up email welcoming your new donor to the cause.
 - Share a specific impact story that their donation helped make possible to show the importance of their gift.
 - Tell the donor how and when you'll be following up and that you're looking forward to getting to know them better.
 - Invite the donor to get in touch with you or a colleague with questions or requests.
 - Send future messages from your executive director, development director or program director. Relationships are built from person to person; not from organization to person.

Within Two Weeks

- ☐ Share content with your donors suited to their interests.
- ☐ Surprise your top-prospect segment with a handwritten than you note, or phone call.
- ☐ For donors who gave offline: mail a second thank you/welcome note (hand-signed if possible) with a short newsletter or impact story.
- ☐ For donors who gave online: kick off your welcome email series, featuring a brief impact story in each email and regularly sharing other info about your organization's unique impact and approach. Include calls to actions such as sharing an event on social media or signing a petition.
- ☐ For new high-value donors, reinforce your relationship with a hand-signed, printed welcome note.

Within One Month

- ☐ Regularly assess your donor data to learn about new donors. We recommend checking every two weeks.
- ☐ Determine which target groups your new donors fit into.
- ☐ Determine how you can customize your messages to match the relevant segment while integrating your welcome and appreciation messages.
- ☐ Note any donors who are similar to one another but don't fit well into existing segments. Is a new segment needed?

Over the Next Three Months

- ☐ Stay in close touch with relevant content. As with any new relationship, the first few months are everything!

Strive to communicate with donors in their preferred format, at the time that they are most responsive and with content they care about.