



Build your expertise through **Virtually GLOBAL's™ Shared Brain™** tip sheets. Learn how to **build your monthly donor file** as a very cost-effective way of raising sustaining funds, improving retention, generating planned giving prospects and building a community of engaged followers.

4 Steps to Building a Large Monthly Donor File

If your monthly donor file does not yet represent 10% to 15% or more of your active (0 to 12 months) donor file, consider accelerating its growth now. How? Start with a success-driven strong foundation, add a smart strategic plan, creatively guide the acquisition campaign and continually monitor and respond to program performance.

Step 1: Conduct a donor and prospect data audit and monthly program readiness assessment.

- Analyze your house file for giving patterns. Identify primary and secondary prospects for monthly conversion.
- Identify other potential accessible audiences for monthly conversion.
- Assess current or potential monthly donor program case for support, program attributes, performance attributes.
- Assess CRM and internal processes for optimal monthly donor program management.

Step 2: Develop a customized multi-year strategic plan.

- Create a monthly donor program with strong case for support, theme, benefits, other critical success components.
- Identify most effective marketing channels by audience, including phone, email, SMS, social media, face-to-face, events, mail.
- Design a systematic, detailed plan, including strategies for:
 - calendar of conversion campaigns by channel;
 - channel integration;
 - target audience segmentation;

- testing;
- CRM reporting templates for essential analytics; and
- projections and budget.

Step 3: Creatively & expertly guide implementation.

- Develop campaign, audience and channel-specific tactics, messaging and creative.
- Conduct weekly campaign results analysis discussions. Refine the campaign strategy and overall plan troubleshooting when needed.
- Conduct quarterly overall program analysis against budget. Respond to gaps with revised strategies.

Step 4: Maintain your monthly donor file.

- Develop and implement a new monthly donor welcome strategy.
- Review and respond to a regular monthly report that lists donation transactions rejected by the payment processor or cancelled by the donor.
- Contact your monthly donors by phone at least once a year to thank them and upgrade their gift amount.

These internal resources are essential for success:

- A skilled program manager to oversee week-to-week implementation of multiple fundraising campaigns.
- Reliable and accurate reporting and analysis.
- A coordinator to own the monthly donor file maintenance to minimize attrition.
- A regular supply of tangible mission impact stories.

Well managed, your growth program ROI should be 100% within one year, if not sooner.

Learn more about how to develop your monthly donor file from the highly experienced Global Philanthropic Senior Consultants on **Virtually GLOBAL™**.

Our team averages 25 years of fundraising experience, including **Vice President Steve Hubley**, who has focused his career on maximizing monthly and annual giving.

Get fingertip and budget-friendly virtual access to expert, personalized fundraising counsel from across Canada.

Let's get started today!

globalphilanthropic.ca/virtually-global