



Apteco

Unlock the full value of your supporter journeys

Best-practice advice on how to use your supporter and donor data to optimise the all-important supporter experience.

What are supporter journeys?

Whether your customers are supporters, donors or volunteers, the experience they have when interacting with your organisation is crucially important. **Supporter Experience** is the term used to describe the way your supporters feel when they interact with your organisation and the **Supporter Journey** is the sum of these experiences, whether direct or indirect, online or offline. This includes everything from the moment of discovery, through to research and consideration, the first gift and finally to cultivating a lasting relationship based on trust, loyalty and advocacy.

What's important to recognise is that every supporter journey is different. It's constantly evolving too – every new interaction has the potential to re-shape the journey, and a negative experience could stop it in its tracks completely.



How do we define the supporter journey lifecycle?



Why is understanding my supporter journeys so important?

In a digital world, consumers are becoming more demanding about the interactions they have with companies and leading companies realise that delivering a more personalised service is an effective tactic for generating consumer loyalty. Donors have come to expect the same levels of service when it comes to their experiences with the charities they support. They want personalised, relevant interactions and are at risk of lapsing should you fail to deliver.

[Donor retention for first-time donors is typically only 25%.](#) But if a donor can be retained the chance of them continuing to donate rises to 63%. [The Fundraising Effectiveness Project](#) found the recapture rate for lapsed donors is as little as 4%, which means if donors stop giving, there is an exceedingly small chance they will give to the non-profit again.

Every communication with a donor should leave them feeling better after the communication than before it.

Giles Pegram CBE

Get it right, and the rewards are huge.

35%

[WWF](#) reported a 35% increase in the number of renewal requests processed, with a concurrent increase in their renewal rate from 3% to 10%



72%

[Alzheimer's Society](#) optimised donor journey led to a 72% increase in donations, with the conversion rate rising from 22% to 65%

Put your supporters at the heart of your fundraising activities and use your data to optimise your supporter journeys and strengthen the effectiveness of your fundraising.



You can't improve what you can't measure

To optimise your supporter experience, start by breaking down the supporter journey into integral elements in order to understand their behaviour. For example, what has brought them to your website or social media page? What are they hoping to achieve? What are their hurdles to donating? What action has the hurdle led to? This is where supporter journey analytics comes in.

It provides an understanding of the supporter experience at each touch point in their journey — so that you can make changes to pain points, replicate the high points, and identify where in the journey people are dropping off and lapsing.

“Analysing the evolution of giving behaviour is vital. In order to make our donations count, we need to understand how and when people give.”

Neil Heslop, Chief Executive, Charities Aid Foundation

According to [Forbes](#). When you personalise your supporter experience, it can have a huge impact on your reach and donation amounts, and to maximise your major donor fundraising efforts, it is crucial to know which of your donors are most valuable.

Donors are
400%
more likely to give again
if thanked within [48 hours](#)
of giving



88%
of all non-profit funds
come from just [12%](#)
[of donors](#) – major
donors

Qualitative or quantitative analytics?

Qualitative and quantitative approaches both offer value – so a combination of the two is most effective to maximise the value.

Quantitative analytics are objective, impartial statistics that can be presented in numbers. They capture what your supporters are doing, uncover broad patterns in donor behaviour and then display those facts as numerical data. For example:



Through which channels are most supporters acquired?



Where are most supporters abandoning their donor journey?



Which appeals are most popular?



What does your donor do throughout their day that might affect when they donate to your charity?



Customer feedback on their user experience



Monitoring social accounts or focus groups for anecdotal stories

Why traditional approaches are falling short

It's worth noting that supporter journey analytics is different to supporter journey mapping. Supporter journey mapping is actually a subset of supporter journey analytics. Journey mapping is used to map out how donors move through their journeys and is a valuable tool to create a better giving experience, and drive generosity – beyond the first gift.

Some organisations, however, will create an ideal or perceived journey, rather than using data to understand how donors are behaving in real life.



Analytics encompasses mapping, as well as additional patterns and metrics. It offers far more insight and presents a much more realistic picture of the supporter journey. Supporter journey analytics success often revolves around an organisation's ability to overcome one rather particular challenge: data silos.

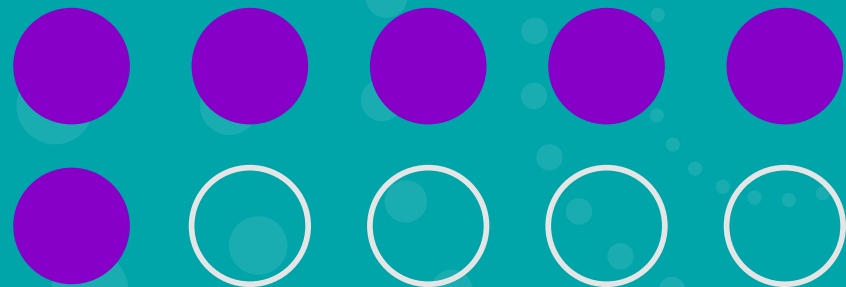
[According to Harvard Business Review](#), almost 60% of organisations say that they've

experienced an increase in retention rates and loyalty after investing in analytics.

However, [Adobe reports](#) that data silos were listed by 37% of businesses as the biggest barrier to creating a comprehensive view of their customers.

It's easy to see why this is the case. When teams within any business or charity act independently, they focus only on their own

objectives. Marketing wants to increase awareness and improve engagement, customer services want to reduce call handling times, fundraising wants to increase donations etc. With each team potentially using its own tools to measure engagement, data is collected in silos. 'Vanity metrics' are confused with journey optimisation – for example, greater social engagement may only be worthwhile if it results in increased traffic or donations.



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[Harvard Business Review](#)



Data silos also translate to poor collaboration and communication, as important information is not shared across the business. A common example could be complaints on social channels not being passed to customer service. Both instances highlight that team objectives must be aligned behind core business objectives, otherwise the supporter experience is not improved.

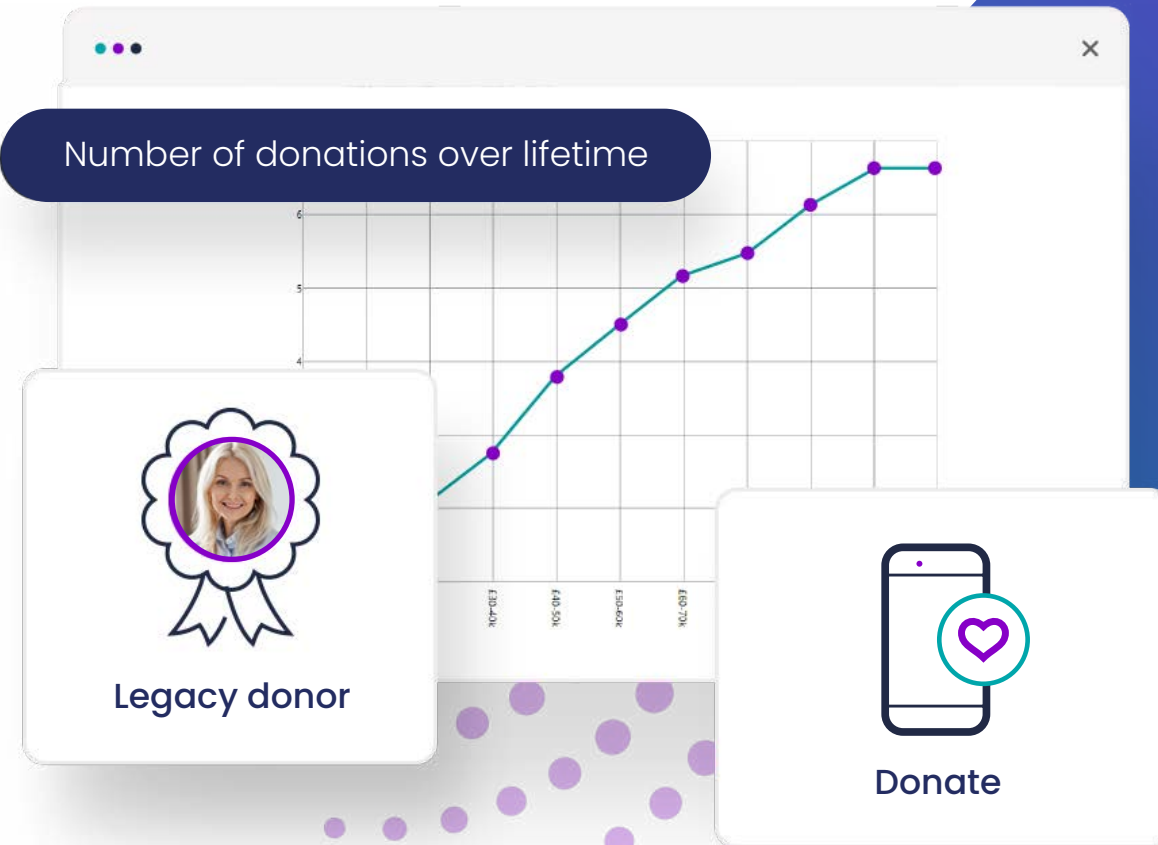
Resources are wasted on efforts that are relatively insignificant, even if they do work. This is clearly highlighted through Gartner's research, showing that although [82% of organisations have created a customer journey map](#), only 47% are using them effectively and seeing any real value.

How do you effectively analyse a supporter journey?

While an alarming number of marketers and fundraisers attempt to manually track and analyse the supporter journey, this approach often relies on assumptions and a large amount of guesswork. As [Bruce Temkin, managing partner at Temkin Group](#), explains:

“Sometimes we fall into the trap of believing we know more about our customers than we actually do and we don’t do enough external research.”

When manually analysing the supporter journey it’s also easy to focus on a small number of events rather than look at every single touchpoint. This is a common mistake. [Forbes](#) points out that some actions are easier to spot than others, which can lead to incorrectly assuming that they are more important.



For most organisations it's simply impossible to analyse every stage of every supporter journey manually. It's not a scalable exercise, and it would take so long that any insights would immediately become outdated and useless.

Supporter journey analytics tools can process huge volumes of data. This data could include everything from email open rates and donor feedback, through to frequency of website visits, average value of donation – even social media behaviour.

This data can be analysed at the click of a button, resulting in meaningful insights that help to build a truly comprehensive picture of the supporter journey.

Get the most from supporter journey analytics

By investing in an effective supporter journey analytics platform that brings together all key data into a single location, charities can deliver the exceptional experience that today's donors demand — and reap considerable rewards as a result.

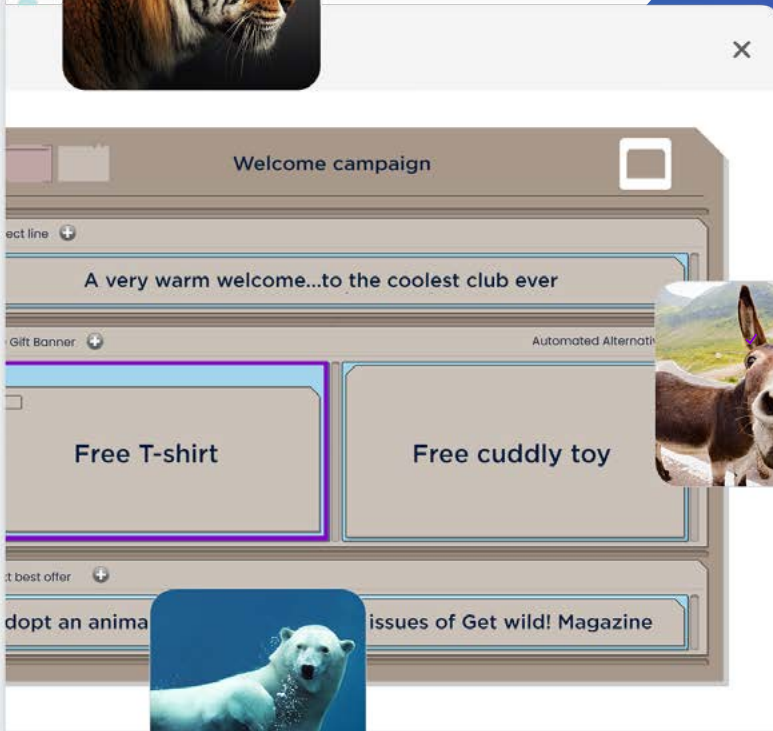
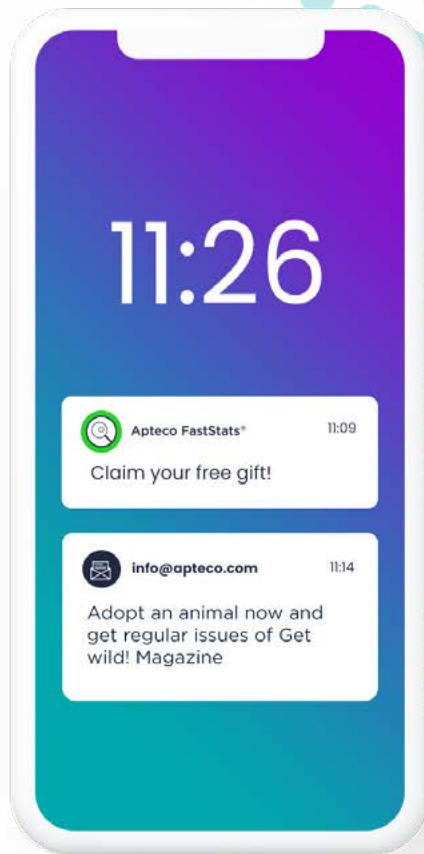


With a far deeper understanding of supporter behaviour, you can actively optimise every journey, and prioritise the key elements that matter most.

You can deliver a consistent experience across all channels, with a new level of personalisation that makes donors feel recognised, appreciated, and understood. You can also optimise service by uncovering key areas of friction and either eliminating them or adding in real-time help so that donors are supported when they face challenges.

All of this has a huge impact on the success of your organisation. By using one data set that serves all, you can ensure that each member of your team is aligned behind your agreed goals. This results in better collaboration, and a coordinated approach that delivers better results.

What's more, with a wealth of journey data at your fingertips, you can demonstrate ROI from analytics, and therefore link journeys and optimisation to better business outcomes.



You can also test and learn at speed – experimenting with different strategies and evaluating which works best in an informed way. Try trigger alerts for specific events, for example, so that supporters get an automated timely message when a threshold is met or when certain behaviours are detected.

Ultimately, you'll achieve the Holy Grail of charity organisations: happier supporters who are more engaged, make repeat donations, volunteer their time, and tell their friends and family about how great you are. This powers your growth and success.

Five aspects of successful supporter journey analytics



Five aspects of successful supporter journey analytics





1. Data fusion

Start your journey with a clear view of your data in order to get a clear 360° picture of each of your supporters. Consolidate data from all your different tools and sources to ensure your insights are complete and accurate. With only some of the data available, it is not possible to see a donor's lifetime value or all the interactions with your charity. Focus on the technical aspects of data integration as well as privacy from a GDPR perspective.

Tip: Start by connecting data from a few key sources such as your CRM, donations platform and email data to help you understand how engagement with marketing communications impacts donations and conversions. Crucially, all the data is in one place so there's no need to jump between different platforms and datasets.



2. Journey discovery

Once you have completed the data fusion stage and have all your data collated into a single customer view, you need to start to identify and understand the patterns of supporter behaviour. Pinpoint important events out of thousands of actions and create automated triggers to alert areas of friction or key events like major donations or bequests. See how different segments respond to campaigns and how your donors move between segments. Understand the importance of individual journeys, and recognise which journeys are most valuable.

Tip: Draw a line from an engagement with a social ad to a subsequent website visit and then to a first donation. Begin to understand journey patterns from your data.



3. Journey insights

Journey insights is about understanding the facts, but it is also about finding answers to your questions and making assumptions and hypotheses to test and learn. Supporter journey analytics will give you the answers to your most important questions. Why did we see a rise in donations for a particular appeal? What are the reasons behind changes in engagement and activity? How do certain actions or behaviours impact future outcomes?

Tip: A good place to start is response analysis and examining data such as conversion rates, open rates, click volumes and A/B testing. When you're ready to take your analytics to the next level you can start to apply predictive analytics methods that will help identify a donor's lifetime value, churn over a timeframe, key differences between different supporter segments, and lookalikes.



4. Journey automation

Put your insights into action. Decide which areas are ready for automation. Automating is about allowing technology to support your creativity and communication to give you the breathing space to work out what to do next. Test to see what delivers the best results and try to replicate that across more supporter journeys. Design and execute your journeys to meet your goals and keep an overview of multiple journeys and touchpoints.

Tip: Move on from simple event triggers such as birthdays or donor abandonment to multi-stage multi-channel campaigns that support your donor's journey and are customised to the stage of the journey they are at. By automating their messaging, marketers can remove the need for manual actions and improve speed and engagement.



5. Journey optimisation

Continuously improve and refine the supporter journey by constantly identifying and removing hurdles. Learn where and why abandonment is taking place so that more donors complete seamless journey steps and have better journey experiences as a result. Around 6 out of 10 potential donors that visit a non-profit's donation page, leave before completing the transaction.

Tip: Begin by alternating channels or offering more channels for non-responders within your automated campaigns to improve engagement and performance. Use this as a building block to implement more advanced techniques such as campaign prioritisation and optimisation.




Companies that lead
in CX outperform
laggards by nearly

80%

Put your supporters at the heart of your fundraising activities

It's no longer enough to rely solely on the loyalty of your current supporters in this crowded and well-informed marketplace. Charities need to be able to tell people where their donation is being spent and what impact it has made accurately and transparently.

[Forrester research has found that companies that lead in CX outperform laggards by nearly 80%,](#) meaning that charities who fail to recognise the importance of CX will certainly get left behind.



This can only be achieved with the knowledge that comes from effective supporter journey analytics. Choose the right platform, and you will take the guesswork out of the process. You'll understand the biggest causes of friction and position your organisation to tackle it head on. What's more, you'll be able to pinpoint the events that deliver the best results and use them as a blueprint for your future actions.

With the inside track on what's most important to your supporters, you will be able to not only meet but exceed their expectations. This will drive loyalty — and ultimately the final goal of recruiting new donors isn't the gift itself — it's the long-lasting relationship which is the foundation for life-long support.

Learn more about Apteco



Apteco for non-profits

Visit our website to read more about how Apteco can help you to use your supporter and donor data to strengthen the effectiveness of your fundraising

[Learn more →](#)



WWF UK case study

Find out how the team at WWF UK were able to maximise membership and renewal revenues, improve engagement and create highly personalised supporter-centric campaigns

[Read now →](#)



Apteco

Creating and building industry-leading software to convert
customer data into actionable insights.

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