

Followup Communication Funnel Plan

The DonorWerx Framework emphasizes following up with congregants at every step of the donor journey. It's important to recognize, however, that this isn't a plan in and of itself. You must lay out specific steps of what will occur after at various moments throughout the journey of giving.

In the subsequent pages, you will find an example followup funnel overview along with various ideas of how these could materialize at your ministry. Use these examples as a jumping-off point for creating your own followup communication funnel plan.

When making your own plan, always remember that kindness is key. Even if someone doesn't sign up for digital giving or automatic gifts, show them appreciation. You never know what they may do in the future.

Followup Funnel Overview

Action/Occurrence	Followup
Parishioner fills out card in church.	Send an email thanking them for their interest and provide a step-by-step guide on how to sign up.
Parishioner makes first online donation.	Confirmation "Thank You" page shows up while thank-you email is simultaneously sent out. Send physical thank-you note.
One week after first donation.	Second thank-you email is sent explaining how contributions are helping and asking donor to sign up for automatic digital giving.
Parishioner signs up for automatic giving.	Confirmation "Thank You" page shows up while thank-you email is simultaneously sent out.
Every few weeks after automated sign-up.	Send updates on how contributions are helping in real-world situations.
Following announcement of campaign.	Send updates on how contributions are helping in real-world situations.
Following legacy gifts.	Call congregant to personally thank them. Send a token gift and ask to feature their testimonial in an upcoming video.

Followup Funnel Ideas

Campaign to Raise Money for Homeless Ministry

- ✓ Include videos on the first-time donor thank-you page that show congregants distributing care packages at the local homeless shelter.
- ✓ Email confirmation of first gift should include information on upcoming volunteer opportunities helping the local homeless community.
- ✓ Email sent one week after donation should explain how many meals can be bought with donations of \$20, \$50, \$100, etc.
- ✓ Post blog sharing the testimonial of a congregant who was able to get on their feet

Campaign to Raise Money for Church Repairs

- ✓ Cards and envelopes that ask congregants to sign up for more information on digital giving and explains how it helps the church are placed under pews each Sunday.
- ✓ Send followup emails on Monday to everyone who fills out a card. Provide step-by-step instructions on how they can give digitally and explain how this saves the church time and money which is better spent on repairs.
- ✓ After first digital donation, send an email that lists some of the ministry's best accomplishments. Reiterate that similar priorities can only be a focus after the roof is repaired.
- ✓ Once repairs are finished, send out a project completion video (e.g. email, social media) showing before and after photos.

Campaign to Switch to Digital Giving

- ✓ Send emails to all congregants announcing an upcoming campaign to convert to digital giving. List the benefits for both the church and parishioners.
- ✓ Send physical thank-you cards to everyone who signs up for digital giving.
- ✓ One week after the first gift, send an email that links digital giving to real-world changes and ask parishioners to sign up for automatic giving.
- ✓ Once the campaign ends, send followup emails and social media posts thanking everyone who gave - even if they didn't switch to digital giving. Celebrate success by quantifying the results of the campaign.