Mapping the Donor Experience is a Fundraising Best Practice

What steps do you take when a new donor gives for the first time? What steps do you take when a donor fills out an online donation form? What steps do you take to move donors from one-time givers to long-term supporters of your organization’s mission? In order to answer these questions and to be consistent in your process, map the donor experience.

What is donor experience mapping?

Mapping the donor experience is the process of designing, outlining, and charting a donor’s engagements, interactions, and activities with your organization. A map outlines the steps your organization will follow to deepen your relationship with a donor.

A donor experience map can be as simple as the steps following a gift made online or as complex as a yearlong engagement plan for new donors to your organization.

A donor experience map is a tactical blueprint for engaging donors.

Why map the donor experience?

There are five reasons why mapping the donor experience is an important fundraising best practice.

1. Operational Control

Mapping the donor experience provides your fundraising department and your organization with step-by-step procedures for interacting with donors.

Using a map will maintain consistent processes and ensure that you follow up with a donor after every action.

A map creates an operational control and eliminates ambiguity in the fundraising process. With a map, everyone at your organization knows which steps are next and why those steps are important.

2. Manage Performance

A donor experience map is a procedural benchmark. Because each step in the donor experience is defined, your organization can make adjustments to the
benchmark by removing activities and strategies that don’t work and promoting activities and strategies that do work.

3. Donor Focused
Mapping the donor experience forces your organization to look at the donor experience through the eyes of the donor (i.e. donor focused). Since the donor experience map is visual and tangible, you can put yourself in the donor’s shoes.

4. Improve the Donor Experience
Improving the donor experience is about removing friction and roadblocks to giving while empowering the donor to engage with the organization. With the preferred donor experience mapped as a benchmark, you can systematically improve the donor experience.

5. Strategic and Intentional
Mapping the donor experience requires the formal process of drawing, outlining, or sketching the actual map. As a result, it should force your organization to think through and discuss the donor experience. By uncovering the true purpose of each activity in the map, you are designing donor experiences that are strategic and intentional.

How to map the donor experience
If you are setting up a donor experience map for the first time, then I recommend starting simple and starting basic. By starting simple and basic you can solidify a best practice donor experience for your organization.

Here are two different types of maps to consider.

Map Type 1: Simple List
A simple list is a step-by-step engagement plan based on a trigger action (i.e. step 1, step 2, ..., step 10).

For example, donors who give a gift online will trigger a series of events:

- They will receive confirmation of their gift.
- They will receive a handwritten thank you note.
- They will also be subscribed to your newsletter.

In addition, you might have another step-by-step process if the donor filling out the form is a new donor (i.e. a different trigger).

For example, new donors:
You can make these simple lists as long or short as you want. However, this type of donor experience map has a single dependency and the progression related to the map is linear.

The simple list method is straightforward and easy to implement.

**Map Type 2: Decision Tree and Network**

A decision tree is more complex than a simple list. A decision tree will have different pathways depending on the interaction with a donor and the triggers from those interactions. A decision tree is an “if, then” map.

For example, let’s say the online donor doesn’t want to subscribe to our newsletter. Since they don’t want to subscribe, we may have a “yes/no” decision branch that alters their path. We still want to engage the donor even if the newsletter isn’t the proper channel, so we add dependent actions to our map.

This mapping technique is more complex, but can more accurately align with the decisions made by real donors.

**Test, Test, and Retest**

The strategies that comprise each step of your donor experience map should be based on results. This means you need to test, test, and retest your maps to find the formulas that work best for your organization.

Keep in mind that you don’t have to be rigid with your donor experience map. While a common process will work for most donors, sometimes you may need to flex and move based on changing donor needs or requests.

A donor experience map is a tool that can help your organization improve consistency in its procedures and increase overall fundraising performance.

Have a question? Want to work with us?

Next steps start with a conversation.