

Taking Control Of The Donor Experience: From Start to Finish

SPEAKER:



Lucas Froese
Senior Manager, Charity Engagement



Land Acknowledgement

Our team at CanadaHelps is grateful to have the opportunity to meet and work on many Indigenous homelands across this land we share, Canada.

As settlers on these lands, it is important to acknowledge that our Vancouver offices are located on the unceded territory of the Coast Salish People, the Montreal offices are located on Kanien'kehà:ka (Mohawk) territory, and the land on which we operate in Toronto is the traditional territory of the Wendat, the Anishinaabeg, Haudenosaunee, and the Mississaugas of the Credit First Nation.

We want to express our respect for the territories we reside in and honour the diverse Indigenous People who have lived and worked on this land historically and presently. We, the staff and leadership at CanadaHelps, are committed to being active participants in reconciliation. We are committed to continuing to amplify Indigenous voices, and learning how our work affects Indigenous People.



Source: #BeadYourProvince, Kooteen Creations

About CanadaHelps

- CanadaHelps is a charitable foundation increasing giving in Canada through technology.
- **For Canadians**, CanadaHelps.org, provides a trusted one-stop destination for making donations, fundraising, or learning about any charity in Canada.
- **For Canada's 86,000 charities**, we also develop affordable fundraising technology and provide free training and education for charities so that all charities have the capacity to increase their impact and succeed in the digital age.
- Since 2000, more than 3.5 million Canadians have donated over \$2.3 billion to charities using CanadaHelps.


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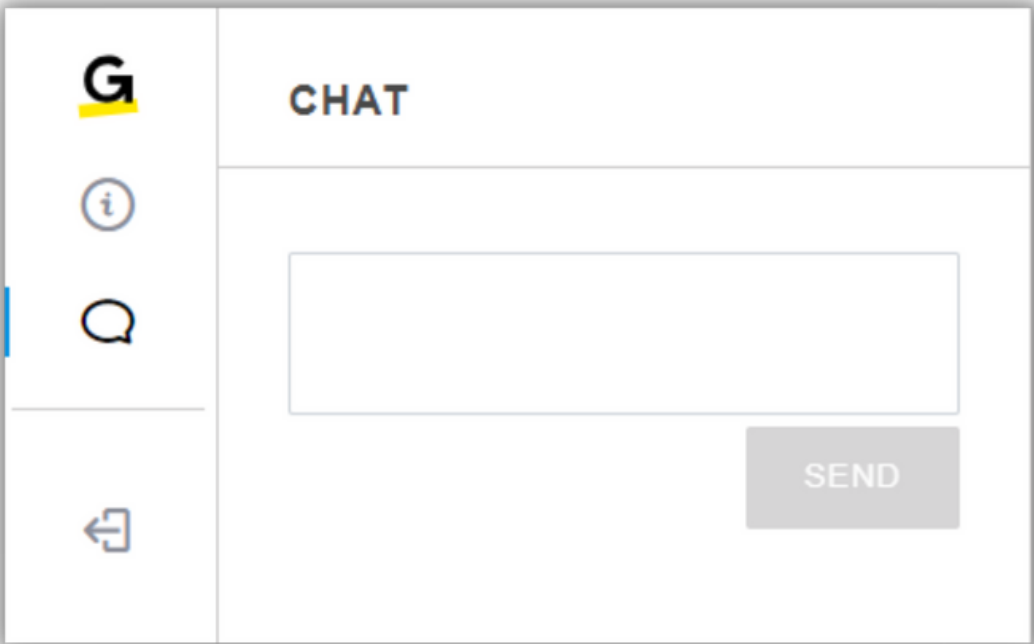


Have a Question?

Click the  icon in the menu.

Then, send us your question.

We'll reply back after the webinar!



We'll also **email you a recording** following the webinar to watch the presentation on demand.



About The Presenter



Lucas Froese

Senior Manager, Charity Engagement

lucasf@canadahelps.org

Since 2018, Lucas has been empowering charities and helping them to level up their fundraising. Lucas is at the forefront of new digital giving developments and has helped thousands of organizations build successful online giving programs.



Agenda

1. What is the Donor Experience?
2. Why is the Donor Experience Important?
3. Making the Donor Experience Better
4. The CanadaHelps Donation Forms
5. Q&A



PART 1

The Donor Experience



What is the Donor Experience?

The donor experience doesn't just start and end with a donation. It includes all the touchpoints along their journey.

1. A Potential Donor Finds Your Charity
2. Navigates to Ways to Give
3. Gives a Donation
4. Confirmation of gift
5. Thanked for gift
6. Tax Receipt provided
7. Further communication



Each of these touchpoints is a place to consider what they are looking for when interacting with your charity and how you can help them feel involved and understand their contribution.

Why is the Donor Experience important?



Build trust that they are donating in the right place and their donor information is secure.



Increase conversions by minimizing the friction and number of steps between the donor and processing the donation.

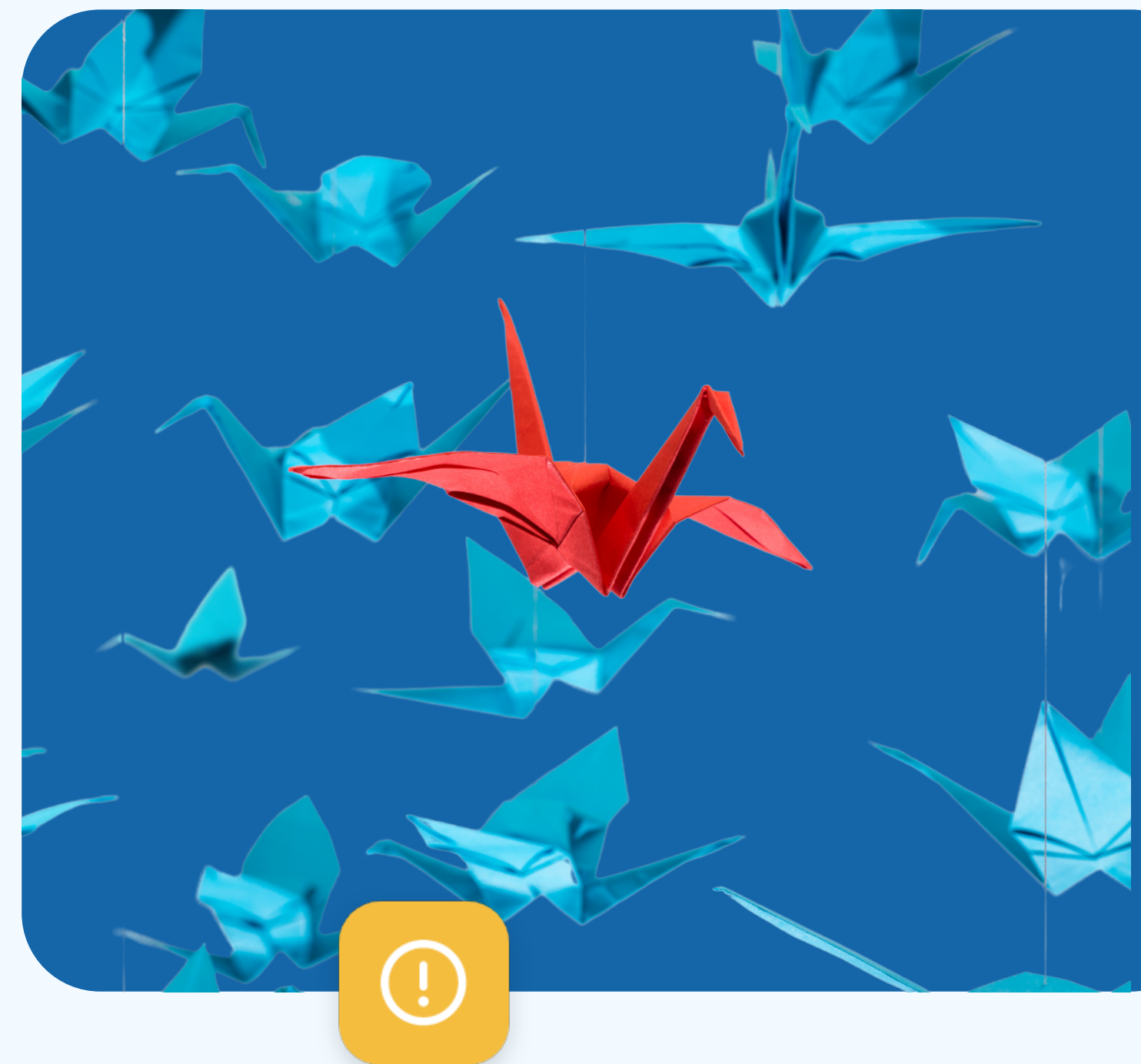


Create stronger relationships by communicating gratitude and impact with a customized thank you letter for each donor.

How to Make the Donor Experience Better?

Tip #1 - Make it easy for donors to donate

- Keep your donation button in **the top right** where donors expect to find the most important buttons
- Make your button **stand out** with an icon or colour
- Experiment with a "sticky" button
- Add additional links to donate when context is appropriate



How to Make the Donor Experience Better?

Tip #2 - Make a specific donation form for each "way to give" or campaign

The central grid displays six donation options, each with an icon, title, description, and a button:

- Make a One Time Gift**: Icon of a heart with a dollar sign. Description: "We rely on the generosity of supporters like you to continue to provide trusted, timely and much-needed information for the millions of Canadians who live with digestive conditions every day." Button: "Make a One-Time Donation".
- Become a Monthly Donor**: Icon of a gift box. Description: "Your monthly gift provides reliable funding so we can continue to do the work we do in education and awareness initiatives for those with digestive conditions." Button: "Give Monthly".
- Make a Gift in Memory of Someone**: Icon of a hand holding a heart. Description: "Donate in memory of someone special to you and let someone know about your gift to CDHF with a beautiful, personalized eCard." Button: "Make a Gift in Memory".
- Donate Securities**: Icon of a hand holding a dollar sign. Description: "Donate securities or mutual funds that have appreciated in value, rather than cash, and eliminate the capital gains tax. CDHF will receive a larger gift and you'll benefit from a larger tax credit." Button: "Donate Securities".
- Start your Own Fundraiser**: Icon of a group of people around a table. Description: "Want to raise funds on behalf of the Canadian Digestive Health Foundation in support of patient programs? Whether its a bake sale, your birthday, or a celebration, now you can!" Button: "Start a Fundraiser".
- Make a Gift in Honour of Someone**: Icon of a notepad. Description: "Donate in honour of someone special to you and let someone know about your gift to CDHF with a beautiful, personalized eCard." Button: "Make a Gift in Honour".

Arrows from the grid point to two specific form examples:

Form 1 (Left): A "DONATION DETAILS" form with tabs for "DONATE ONCE" and "DONATE MONTHLY". It includes a "DONATION AMOUNT" section with buttons for \$25, \$50, \$100, and \$500, and a "Custom amount" field. Below is a checkbox for "Make my gift go further. I'd like to cover the \$0 processing fee so 100% of my donation goes to this charity." and a "FUND" dropdown menu set to "CDHF's 30 Year Anniversary Campaign". There is also a field for "Write a private message to us (optional)".

Form 2 (Right): A "DEDICATION" form with tabs for "In Memory of", "In Honour Of", and "No dedication". It includes a field for "Enter name (In Memory of)*" and a "Send an eCard" button. Below is an "ECARD CATEGORY" dropdown set to "General/Blank". It features a grid of eCard thumbnails: "A Special Gift", "A Gift For You", "A Special Gift For You", "A Gift Just For You", and "A Gift For You".

Form 3 (Bottom Right): A "DONATION DETAILS" form with tabs for "SECURITIES" and "MUTUAL FUNDS". It includes a field for "Name/Description of Security*", a "Stock / Ticker Symbol" field, and an "INVESTMENT MANAGEMENT" dropdown set to "I use a self-directed online investment platform". There are also fields for "Investment Platform*" and "Account Number*".

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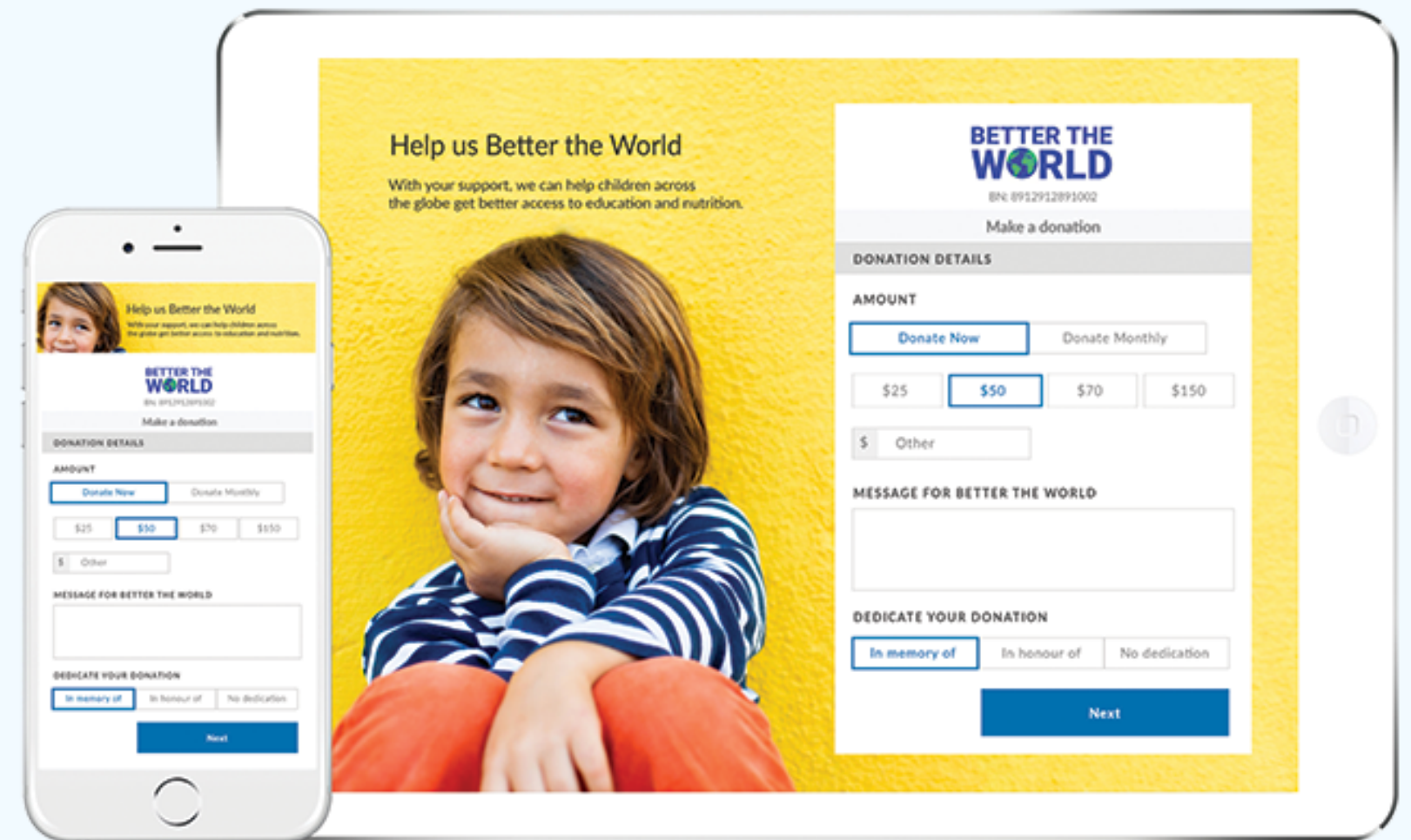
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Source: [Canadian Digestive Health Foundation](#)

How to Make the Donor Experience Better?

Tip #3 - Follow Donation Form best practices

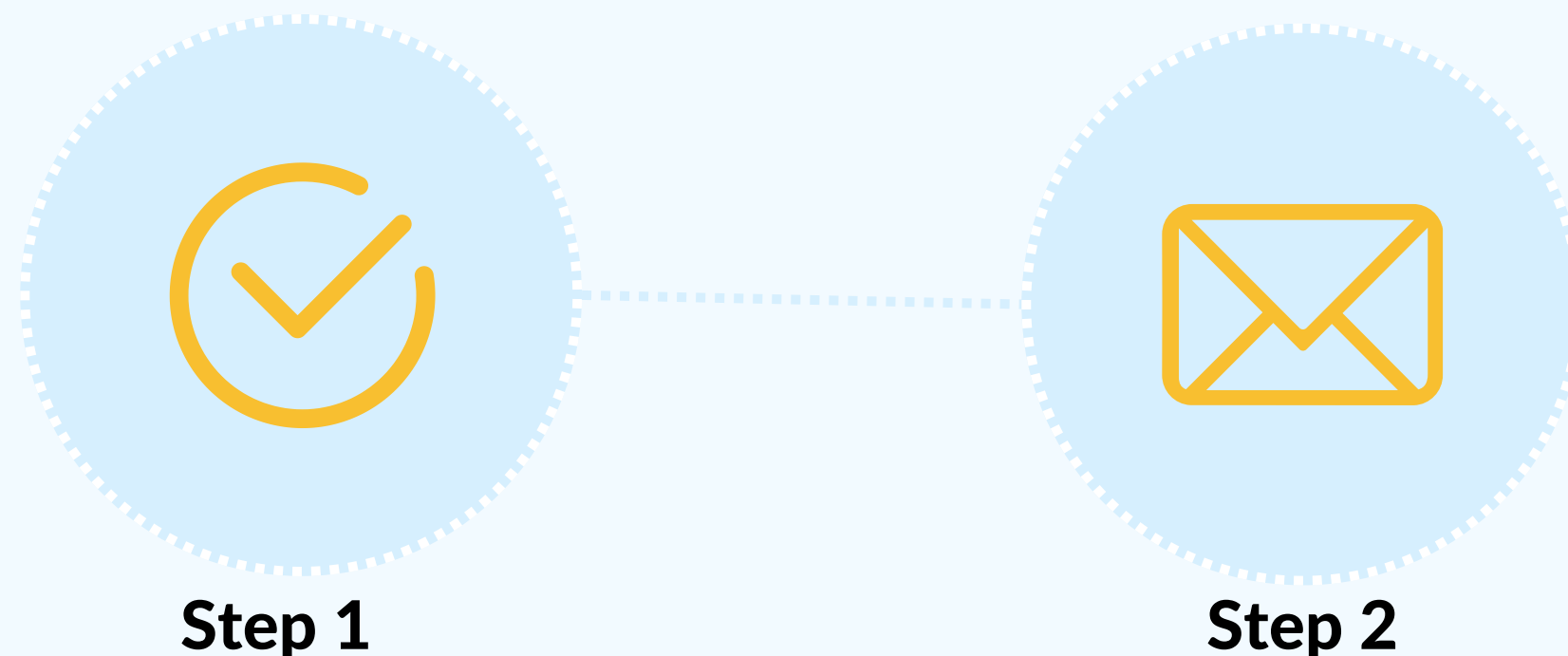
1. Keep the donor on your site
2. Customize your donation form to match your brand
3. Make it as simple as possible
 - Communicate your mission succinctly/use pictures
 - Ask only information you need/will act on
 - Aim for fewer clicks
 - Experiment with multi-step
4. Communicate impact of different amounts
5. Optimize for all devices
6. Test your assumptions



25% of donors complete their donations on mobile devices

How to Make the Donor Experience Better?

Tip #4 - Ensure your donors are acknowledged and thanked



Acknowledging that the donation was completed on the page

Sending a personalized thank you

One of the best ways to do this in a timely way is to automate your thank-you process

How to Make The Donor Experience Better?

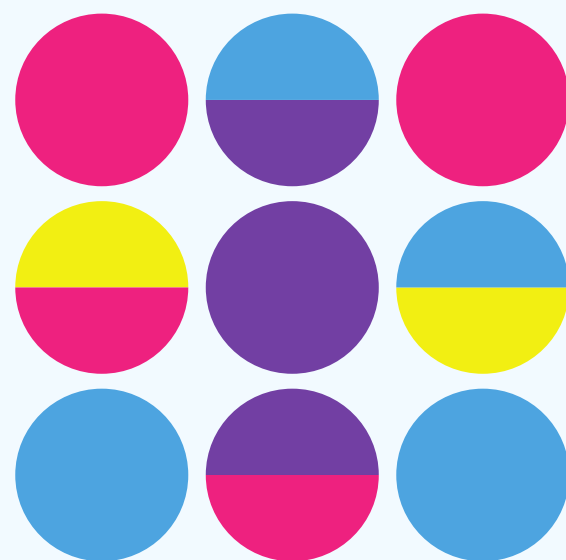
Tip #5 - Take control of your tax receipt with customized branding



This helps to reinforce trust that their donation has gone to the right place.
This is also a great place to thank them again and explain the impact of their gift.

How to Make The Donor Experience Better?

Tip #6 - Throughout the experience, make sure your touchpoints are branded, personalized and reach the donor at the right time



Branded using your logo, colours, messaging and voice



Personalized by using their name, specific donation details (e.g. type of donation, campaign), and acknowledging their preferences



Reach the donor **at the right time** by automating communications and following best practices

Donor Experience Question Checklist

- What is the donation experience like?
- How many steps are there to your charity's donor experience?
- Is the information on the donation form all necessary?
- What page are you brought to after completing your donation?
- Are donors thanked after their donation? If yes, when?
- When is the Tax Receipt sent?
- Are there further communications afterwards?
- Is there anything else to be done to improve the donor experience?



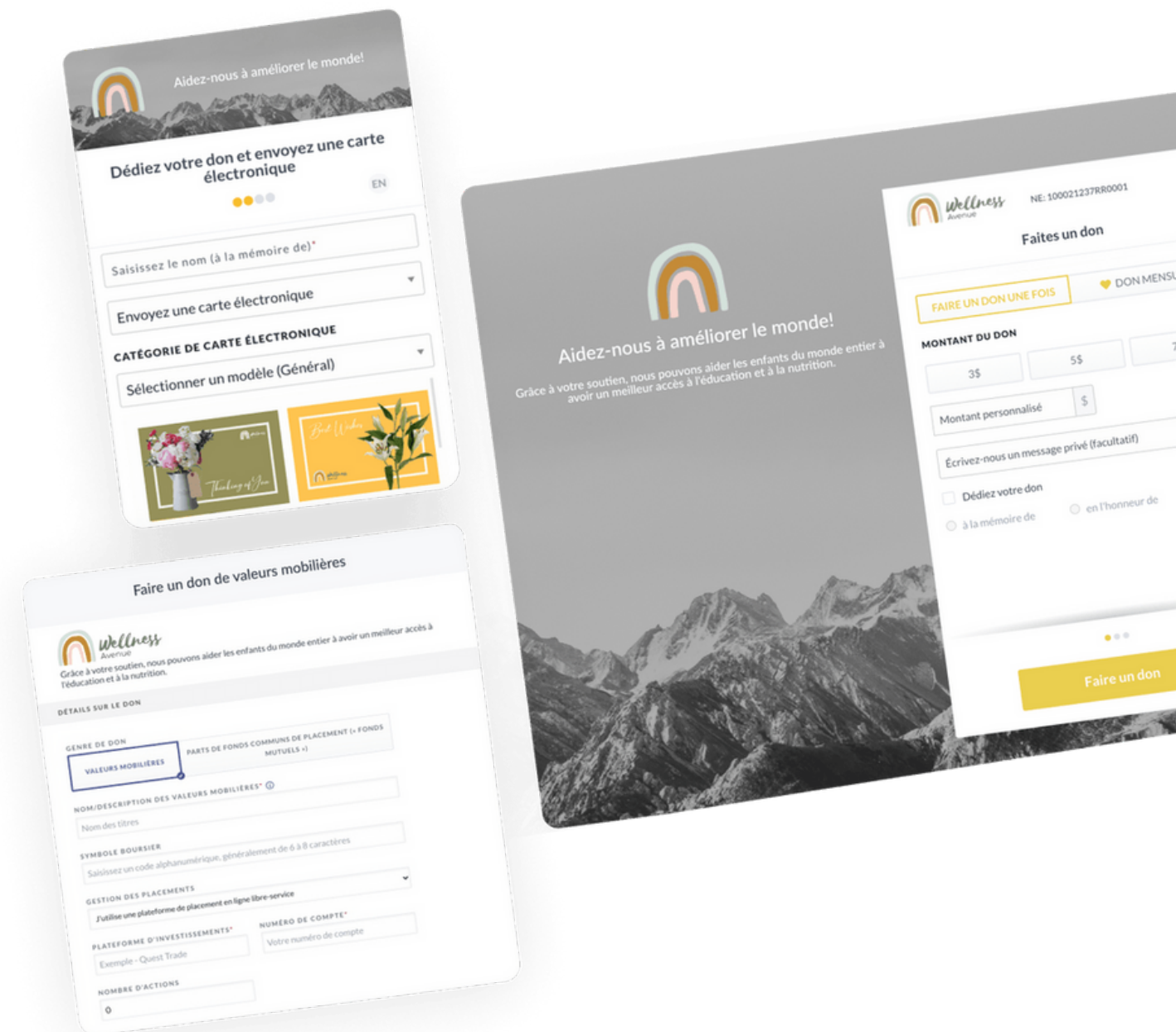


PART 2

CanadaHelps Donation Forms



How does CanadaHelps Donation Forms Help with the Donor Experience?



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Taking Control Of The Donor Experience: From Start to Finish

Designed For Every Step of the Donor Experience Journey

A Potential Donor Finds Your Charity

Navigates to Ways to Give

Gives a Donation

Confirmation of gift

Thanked for gift

Tax Receipt provided

Further communication



- ♡ Share in multiple ways
- ♡ Create unlimited forms
- ♡ Best practices built-in
- ♡ Choose from multi-step or one pager
- ♡ Control thank you messaging
- ♡ Branded tax receipt
- ♡ Donor information for further communication

Q&A



Contact Us

info@canadahelps.org

1-877-755-1595

www.CanadaHelps.org

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