



THE 7-WEEK HOUSECLEANING CHALLENGE

Improve your digital fundraising efforts by starting with the basics. Audit your practices with the Housecleaning Challenge to help acquire and retain your donors. Details at charityjen.com/housecleaning.

Congratulations! You have accepted the seven-week digital fundraising challenge. This investment of time shows your commitment to ensuring a meaningful online giving experience for your donors.

To Start: Book one hour on your calendar each week for seven weeks. Most of your time will be spent auditing and taking inventory rather than fixing. If you can update along the way, great! But be realistic as you move through each weeks' assignments. This exercise is meant to provide a roadmap for you and your team, not more stress.

WEEK 1: DATA CLEANUP INVENTORY

In your database, run queries for duplicate addresses, empty name fields, or other incorrect or missing codes. Inventory and prioritize. Create a schedule of small chunks of time to make corrections or map a long-term incremental plan. If possible, seek additional help from your development team.

WEEK 2: DONATION FORM TESTING

Test the flow of your donation form. Use both a desktop or laptop, a mobile device, and an iPad. Check for these common errors, prioritize the list, and map a timeline for improvements:

- Can you see the full form on all screens?
- Are your dropdowns and buttons working properly on these screens?
- Can you easily enter information in all of the fields without error?
- Make a purposeful mistake in each field. What happens? Do the error messages make sense?

WEEK 3: AUDIT THE AUTORESPONDERS

Check your post-donation landing page messages and email confirmations, aka autoresponders, for these common issues:

- Do they convey gratitude and reinforce the impact of the gift?
- Are they personalized? (I.e., donor name or campaign name)
- Are they signed with a name/signature from leadership? (I.e., CEO, Chair, Director)
- Do they include organization or campaign branding? (I.e., logos or images)
- Do they include a “next step” for the donor? (I.e., attend events, volunteer, newsletter signup, membership benefits, or a CEO thank you video?)



CharityJen helps nonprofits achieve maximum success with digital fundraising, integrated campaigns, and online engagement.

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WEEK 4: INCORPORATE YOUR MISSION

Review your website, donation forms, landing pages, donation confirmations, emails, and social media profiles to ensure your mission statement and value proposition are front and center. Make a list of improvements for your roadmap.

WEEK 5: PONDER PERSONALIZATION

Review communications where personalized components could be incorporated such as:

- A personalized salutation on a post-donation landing page and email. (I.e., "Dear Jane...")
- A geographic location in a weekly email. (I.e., "Neighbors just like you in Cala County...")
- A last gift amount or date. (I.e., "Thank you for your \$50 gift on December 15, 2021. Can we count on your support again this year?")
- Specific interests in newsletter based on the last email click-through. (I.e. "If you're interested in pandas, you might love this new story about our panda habitat.")

WEEK 6: BUILD ON SEGMENTATION

In addition to the communication channels you examined last week, think of ways to segment for even further targeting, including digital ads (paid search, display, or social) and conditional content in emails. Consider these groups and what these messages and ads might say:

- Prospects or donors: lapsed, additional gift or upgrade
- Participation: volunteers, event attendees, communication preferences
- Demographics: geographic or interests

WEEK 7: LIST THE LISTS

Evaluate your ideas and notes from the prior six weeks rate them in two ways: high or low impact vs high or low effort. Plot them on an "action priority matrix" or sort them on a spreadsheet. Prioritize the high impact – low effort items first and create your roadmap.

Finally, book a bi-monthly meeting with yourself to check in on your list of lists. Review, re-evaluate, re-prioritize, and create your plan for the next seven weeks. Rinse and repeat until all items are complete.

Share your experience!

How did it start? How's it going?

I'll share your feedback in future posts and on my website.

Email Jen Newmeyer at charityjen.com



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