

FUNDRAISING FRAMEWORK

Donor Journey Mapping Template

A Comprehensive Framework for Mapping, Optimising, and Automating the
Supporter Experience in Not-for-Profit Organisations

VERSION

1.0

YEAR

2025

PUBLISHER

AmplifyData.org.nz

Awareness

Acquisition

Engagement

Retention

Advocacy

Automation

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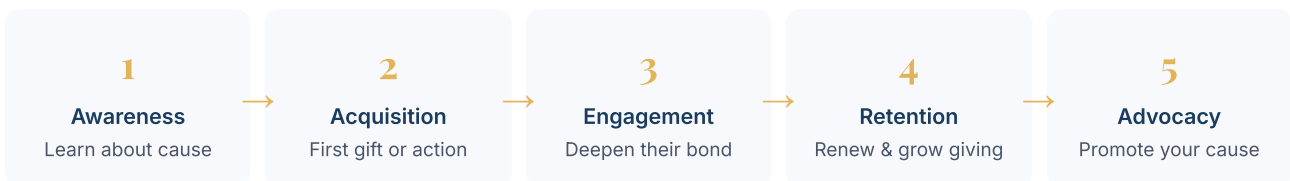
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Introduction

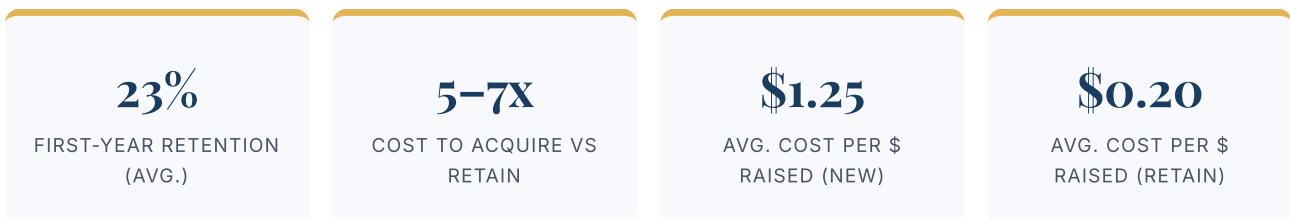
What is donor journey mapping and why it matters

Donor journey mapping is a strategic approach to visualising and optimising every interaction a supporter has with your organisation — from their first awareness of your cause through to becoming a lifelong advocate and major donor.

The Donor Journey at a Glance



Why Journey Mapping Matters



WHAT MAKES A MEANINGFUL TOUCHPOINT?

Meaningful: Personalised thank you call, handwritten note, impact report tied to their gift, invitation to exclusive event, personal update from CEO, birthday message.

Non-meaningful: Generic email blast, standard receipt, mass appeal letter, automated confirmation.

The Five Journey Stages

tailored framework for each stage of the donor experience

Stage 1: Awareness

Awareness

Build brand recognition and cause awareness

CHANNELS

- Website
- Social media
- Media coverage
- Events
- Word of mouth
- Partnerships

CONTENT

- Cause education
- Impact stories
- Organisation overview
- Credibility indicators
- Emotional connection

SUCCESS METRICS

- Website traffic
- Social followers
- Newsletter signups
- Event attendees
- Engagement rate

Conversion Goal: Newsletter subscriber or event attendee

Stage 2: Acquisition

Acquisition

Secure first gift or commitment

CHANNELS

- Direct mail
- Digital appeal
- Face-to-face
- Events
- Peer-to-peer
- Telemarketing

CONTENT

- Compelling ask
- Urgency/need
- Specific impact
- Easy giving options
- Social proof

SUCCESS METRICS

- Response rate
- Conversion rate
- Average first gift
- Cost per acquisition
- Channel ROI

Conversion Goal: First donation or monthly giving signup

Acquisition Benchmarks (NZ/AU)

CHANNEL	AVG. COST	AVG. FIRST GIFT	BEST FOR
Direct mail	\$25–45	\$40–60	Older demographics
Digital (email/social)	\$10–20	\$35–50	Younger donors
Face-to-face	\$80–150	\$25/mo regular	Regular giving
Events	\$50–100	\$100–200	Mid-level acquisition
Peer-to-peer	\$5–15	\$30–50	Younger/engaged

Stage 3: Engagement

Engagement

Build emotional connection and trust

TIMELINE

- 0–48 hrs: Thank you
- Week 1: Welcome email
- Month 1: Impact update
- Quarterly: Newsletter
- Annually: Annual report

CONTENT

- Impact stories
- Beneficiary voices
- Behind-the-scenes
- Progress updates
- Donor recognition

SUCCESS METRICS

- Email open rate
- Click rate
- Event attendance
- Volunteer signups
- Net Promoter Score

Conversion Goal: Second gift or deeper engagement action

Welcome Series Timeline

Day 0	Donation → Immediate receipt + personal thank you email from ED
Day 3	Welcome Email 1: "Thank you for joining our community" + mission overview
Day 7	Welcome Email 2: "Here's what we're working on" + beneficiary story
Day 14	Welcome Email 3: "Meet our team" + volunteer/event opportunity
Day 28	Welcome Email 4: "Your first month of impact" + thank you from beneficiary

Stage 4: Retention

Retention

Secure renewal and upgrade to higher giving

RENEWAL TIMELINE

- 3 months out: Stewardship
- 6 weeks out: Soft renewal
- 2 weeks out: Direct ask
- On anniversary: Appeal
- Post-lapse: Recovery

UPGRADE TRIGGERS

- Anniversary
- Major impact milestone
- High engagement score
- Capacity signals
- Matching gift opportunity

SUCCESS METRICS

- Retention rate
- Upgrade rate
- Average gift change
- Lifetime value
- Downgrade rate

Conversion Goal: Renewed gift at same or higher level

Retention Calendar (Annual Donor)

TIMING	TOUCHPOINT	CONTENT FOCUS
Month 1	Welcome series	Onboarding, impact preview
Month 3	Impact update	First outcomes from gift
Month 6	Mid-year appeal	Matching gift or campaign
Month 9	Pre-renewal stewardship	Year of impact summary
Month 10	Soft renewal reminder	Anniversary approaching
Month 11	Renewal appeal	Direct ask with upgrade option
Month 13+	Lapsed series	Win-back campaign

Stage 5: Advocacy

Advocacy

Develop donors as ambassadors and major supporters

ADVOCACY TYPES

- Word of mouth
- Social sharing
- Peer-to-peer fundraising
- Volunteering
- Board participation
- Major/planned giving

CULTIVATION

- Personal relationship
- Exclusive access
- Recognition opportunities
- Legacy giving conversations
- Major gift cultivation

SUCCESS METRICS

- Referrals generated
- Social shares
- P2P participation
- Major gift pipeline
- Bequest inquiries

Conversion Goal: Referrals, major gift, bequest intention

Touchpoint Planning Framework

Annual calendar, frequency guidelines, and content matrix



Touchpoint Frequency Matrix

SEGMENT	APPEALS	STEWARDSHIP	NEWSLETTER	PERSONAL CONTACT
Prospects	2/year	N/A	Monthly	Events only
First-time donors	3-4/year	4/year	Monthly	Welcome call
Repeat donors	4-5/year	4/year	Monthly	Anniversary
Regular givers	2/year	6/year	Monthly	Quarterly
Mid-level (\$250+)	3-4/year	6/year	Monthly	Bi-annual
Major donors (\$1K+)	2-3/year	8-12/year	Monthly	Monthly
Lapsed (12-24mo)	4-6/year	2/year	Monthly	Survey/call

Touchpoint Content by Stage

Awareness

Educational: "5 things you didn't know about [issue]"

Emotional: Beneficiary story video

Credibility: Media coverage, awards

Acquisition

Problem/Solution: "Children in our community are going hungry"

Urgency: Matching gift deadline

Impact: "\$50 provides 20 meals"

Engagement

Impact Proof: "Your gift helped 150 families"

Behind-the-scenes: Staff stories, updates

Gratitude: Thank you from beneficiaries

Retention & Advocacy

Relationship: Anniversary acknowledgment

Exclusivity: Insider updates, early access

Recognition: Donor wall, annual report

Segment-Specific Journey Maps

Core journeys for first-time, regular, major, and legacy donors

02

First-Time Donor Journey

GOAL & TARGET

Goal: Convert first-time donor to repeat donor within 12 months

Target: 40%+ conversion rate (vs 23% sector average)

Touchpoint Schedule

Day 0	Receipt email (immediate) + personal thank you email from ED/Fundraiser
Day 3	"Welcome to our community" email + brief org overview
Day 7	"Here's what we're working on" + current project spotlight
Day 14	"Meet our team" + behind-the-scenes + volunteer/event opportunity
Day 21	Donor survey: "Tell us about yourself"
Day 28	"Your first month of impact" + specific outcome
Month 3	Mid-appeal or engagement ask (volunteer, event)
Month 6	Mid-year appeal
Month 10	Pre-renewal stewardship: "Year of impact" summary
Month 11	Renewal appeal: Direct ask
Month 12	Renewal follow-up: Urgency message

Regular Giver Journey

GOAL & TARGET

Goal: Retain regular givers for 5+ years, upgrade 10%+ annually

Target: 95%+ annual retention, \$15/month average upgrade

Onboarding (Months 1-2)

- Welcome call
- Welcome pack by mail
- RG-specific email series
- Thank you video or card
- First debit confirmation

Ongoing Stewardship

- Monthly newsletter (RG edition)
- Quarterly impact report
- Exclusive content
- Birthday/occasion messages
- Failed payment recovery

Upgrade Cultivation

- Anniversary thank you + upgrade ask
- Matching gift opportunities
- Major donor cultivation
- Bequest information

Major Donor Journey

GOAL: CULTIVATE, SOLICIT, AND STEWARD MAJOR DONORS (\$1,000+ ANNUALLY)

Target: 70%+ retention, 20%+ upgrade rate

Cultivation Cycle (12-18 Months)



Major Donor Touchpoint Calendar

MONTH	TOUCHPOINT	OWNER	PURPOSE
Jan	New Year call/email	ED	Relationship
Feb	Impact report	Fundraiser	Stewardship
Mar	Board member lunch	Board	Cultivation
May	Site visit invitation	ED	Cultivation
Jun	Annual report (early)	Fundraiser	Stewardship
Aug	Exclusive event	ED/Board	Cultivation
Sep	Project proposal	Fundraiser	Solicitation
Oct	Follow-up meeting	ED	Solicitation
Dec	Holiday greeting	ED/Chair	Relationship

Retention & Upgrade Pathways

Framework for keeping donors and growing their giving



Retention Benchmarks

METRIC	SECTOR AVERAGE	GOOD	EXCELLENT
First-year retention	23%	35%	45%+
Multi-year retention	43%	55%	65%+
Regular giver retention	80%	90%	95%+
Major donor retention	60%	75%	85%+

THE RETENTION EQUATION

Retention = (Right Message) + (Right Time) + (Right Channel) × Emotional Connection

Why Donors Stop Giving

Organisation Factors (54%)

- No thank you or late thanks
- No communication about impact
- Too many or too few asks
- Felt unappreciated

Donor Factors (36%)

- Financial changes
- Competing priorities
- Life changes
- Forgot to renew

External Factors (10%)

- Moved away
- Found another cause
- Negative media
- Economic downturn

Upgrade Strategies

Specific Impact Upgrade

"Your \$50/month feeds 20 families. Could you consider \$75 to feed 30?" Show the direct impact of an increased gift.

Anniversary Upgrade

Celebrate their giving anniversary with a personal acknowledgment, then gently suggest an increase to mark the milestone.

Matching Gift

Partner with a major donor or corporate sponsor to match increased gifts: "Double your impact by increasing your monthly gift."

Channel Upgrade

Convert one-time givers to regular giving: "\$60 once = \$5/month but \$5/month = \$60/year — consistent, predictable impact."

Lapsed Donor Reactivation

Win-back campaigns and re-engagement strategies

Lapsed Donor Recovery Timeline

0–3 Months	Warm: High chance of recovery. Gentle check-in, impact update, soft renewal reminder.
3–6 Months	Cool: Moderate chance. Direct renewal appeal, "We miss you" messaging, survey to understand why.
6–12 Months	Cold: Lower chance. Emotional re-engagement, new programme highlight, final appeal with urgency.
12+ Months	Dormant: Low chance. Consider as re-acquisition. Annual re-engagement attempt or remove from active list.

Win-Back Email Series

Email 1	"We noticed you've been away" — Warm, personal message highlighting recent impact without asking for money
Email 2	"Here's what's changed" — New programmes, achievements, growth since their last gift
Email 3	"Your impact is missed" — Specific gap their giving addressed, emotional beneficiary story
Email 4	"Will you come back?" — Direct ask with compelling reason, easy re-engagement options

Automation & Technology

CRM tools, email automation, and tech stack for journey management



Essential Automations

01

Welcome Series

Trigger: First donation. Auto-send 4–5 emails over 28 days introducing org, impact, and community.

02

Thank You

Trigger: Any donation. Immediate receipt + personalised thank you within 24 hours. Phone call for \$100+.

03

Anniversary

Trigger: 12 months since first gift. Impact summary, celebration message, gentle upgrade ask.

04

Lapsed Recovery

Trigger: No gift for 12+ months. 4-email win-back series over 6 weeks.

05

Failed Payment

Trigger: Declined regular gift. Immediate notification, retry, update card request, personal follow-up.

06

Birthday/Special Date

Trigger: Stored date. Personal message, no ask, just relationship building.

Measurement & Optimisation

s, dashboards, and continuous improvement

Key Performance Indicators by Stage

STAGE	PRIMARY KPI	TARGET	SECONDARY KPIS
Awareness	Newsletter signups	+20%/year	Website traffic, social followers
Acquisition	Cost per acquisition	< \$30	Conversion rate, avg first gift
Engagement	Second gift rate	> 40%	Email opens, event attendance
Retention	Retention rate	> 55%	Upgrade rate, lifetime value
Advocacy	Referral rate	> 10%	P2P participation, NPS

Journey Health Dashboard

Donor LTV

TRACK LIFETIME VALUE
TRENDS

Churn Rate

MONITOR ATTRITION
MONTHLY

RFM Score

RECENCY, FREQUENCY,
MONETARY

NPS

NET PROMOTER SCORE
QUARTERLY

Implementation Workbook

Step-by-step rollout plan for your donor journey programme

90-Day Implementation Plan

Month 1: Foundation

- Audit current donor touchpoints
- Map existing journey (as-is)
- Segment your database
- Identify top 3 journey gaps
- Set up CRM/email automation

Month 2: Build

- Design ideal journey maps
- Create welcome email series
- Build thank you protocols
- Set up automation triggers
- Write lapsed donor series

Month 3: Launch

- Activate automations
- Train team on protocols
- Set up KPI dashboard
- Begin touchpoint calendar
- Schedule monthly reviews

Journey Mapping Workshop Checklist

Pre-Workshop

- Pull donor retention data by segment
- Map all current touchpoints
- Survey 10–20 donors about their experience
- Print blank journey map templates
- Invite cross-functional team members

During Workshop

- Map current state journey (as-is)
- Identify pain points and gaps
- Design ideal journey (to-be)
- Prioritise improvements
- Assign owners and deadlines

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