

On Boarding Ideas for New Monthly Givers

When someone signs up as a monthly giver, it can be tempting to assume that since they are giving automatically, you can “set them and forget them.” But nothing could be further from the truth, and more damaging to a potential long-term transformational relationship. It is important to remember that monthly giving is as much, if not more, about what you want FOR your champions than what you gain financially from them.

When someone raises their hand and says, “I’m in!” you need to have a plan in place to welcome them through a series of communications that help integrate them into your community. Your plan will envelope new monthly givers into a group of existing monthly givers, encouraging one another that there are more like-minded and like-hearted people just like them.

INSTRUCTIONS: The list below is scheduled over four parts. Each part includes ideas to consider. Circle the ideas you could implement right away or write down a different idea on the blank line. Put a star next to the ideas that you might not be able to do right away but want to reconsider as your monthly giving strategy grows.

Once you’ve formalized your plan, write it up in its own document that can be shared with your team and referred back to regularly as you implement and execute your plan for onboarding new monthly givers.

First 72 Hours | A High Touch Thank You

Communicate appreciation quickly and intentionally. Consider:

- Send a handwritten note on a monthly giving program branded card.
- Make a personal phone call welcoming this new giver to your monthly giving program.
- Asking an existing member of your monthly giving program to call and welcome this new giver to the community.
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Within 10 Days | Send a Welcome Packet

Send a welcome packet, preferably in the mail. This packet could include:

- Information on the organization, (mission, vision, values, and particulars pertaining to the program that the monthly giving funds support) providing a learning P-E-O step.
- Information about the crucial need for this work to continue and why their involvement and gifts are so valuable.
- Stories of impact that this monthly giving program is helping to create.
- Expectations they can have from the monthly giving program (agreement and program benefits). Consider sharing the unique ways you’ll interact with these givers, such as:
 - Particular ways you’ll communicate, such as:
 - Closed Facebook groups
 - Insider access on the website
 - Special events
 - Regular communication from your CEO
 - Opportunities they’ll receive, such as:
 - Gift from the community you support
 - A book
 - Swag items specifically branded to your program
- Contact information for who to call if they have questions about their gift or the program.
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Within 30 Days | Get-To-Know-You Communication

Create a get-to-know-you communication piece. This could be done over the phone or through pre-addressed and stamped mail, email or texting.

All of this information should be then stored in your CRM for future reference.

What kinds of things would you want to know about your new monthly givers? Consider:

- Their story of connection. Learn what motivated them to join your monthly giving program.
- What are they wanting out of this relationship. Are they hoping to grow in their faith? Are they wanting to create impact in a cause that is important to them? Are they wanting to teach their children how to be empathetic and engaged change-makers?
- How they want to be communicated with. Some champions prefer mail, or phone, or text. Once you know their preferred method, you'll be more likely to connect with them and help them stay engaged.
- Company they work for. Many companies will match employee giving, if you find that theirs does, this could be a way to invite them into deeper engagement by applying to have their monthly giving matched.
- Additional personal information, such as birthdays, anniversaries or something specific to your cause (i.e.: if you're a children's music therapy organization you might want to ask for names and birthdays of champion's children to send them a birthday gift). You can use this information to personally celebrate your monthly giving champions in a way that shows you know them.

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Within 60 Days | Monthly Giving Check-In

Designate a time to check in with your monthly givers and hear how this experience is going for them.

Refer back to the stored information in your CRM from your previous get-to-know-you communication and follow up on any open items. Remember to store information you gain from this point of connection in your CRM for future reference. Consider asking questions like:

- How are you enjoying this experience?
- What is God teaching you through your giving?
- How can we improve communication with you?
- What other things are you interested in learning more about?
- How are they doing, and how can you pray for them?
- Invite them to take the next P-E-O step in the area of serving, sharing, praying, or learning.

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