



# How to Optimize the Peer-to-Peer Fundraising Lifecycle

Presented by: Mark Becker

Wednesday, March 20 | 12:00-1:00 p.m. ET



Donation Forms | Event Registration  
Text Fundraising | Peer-to-Peer | Auctions



# A little housekeeping...

*We're recording this webinar!*



All registrants will receive an email containing a link to the recorded webinar AND a ton of other resources!

*Feel free to ask questions!*



Use the Questions chat box to ask your questions. We will have a Q&A session at the end of the presentation.



## Put relationships at the heart of your fundraising.

Bring together the best of fundraising, volunteer, and donor relationship management with a unified giving platform! Connect with your donor community to raise more donations and build support for your world-changing work.

- + Attract new donors to support your cause and leave lasting impressions throughout their giving experience.
- + Level up your fundraising results and unlock future giving potential by unifying your donor data and tools.
- + Build meaningful relationships with deeper donor insights and time saving tools.





# Powerful Fundraising Technology + Nonprofit Service Provider

We know the value of relationships and are proud to connect you with Cathexis Partners, a member of our partner network.



We help nonprofits use technology  
to raise funds and engage  
supporters effectively and affordably.



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# Today's Speakers



**Mark Becker**  
**Founder, Cathexis Partners**

Mark founded Cathexis Partners in 2008, providing technical and consultative services to nonprofits of all sizes and all verticals. He previously served as director of IT consulting at a fundraising event production company focused on nonprofits. For more than 17 years, Mark has supported hundreds of nonprofit online fundraising efforts.



# What is the Peer-to-Peer Fundraising Lifecycle?



# The Peer-to-Peer Fundraising Lifecycle

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# 7 Tips For Recruiting More Participants

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# 1. Create powerful messages.

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What makes our organization unique?



What impact are we having on our mission?



What photos or images best reflect our impact on our mission?



How is our peer-to-peer campaign solving a problem?



How do we want people to feel about our mission and our campaign?



What will the funds raised help our organization accomplish?



How can participants help us reach our fundraising goals?



What compelling statistics can we include?

## 2. Make your story easy.

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**Easy to understand** — Your messaging should make it obvious why your organization has launched the p2p fundraising campaign.



**Easy to convey** — You may be solving a complicated problem, but your message should be simple enough for participants to explain to others.



**Easy to share** — Sharing is the root of p2p fundraising, which means your p2p tools should make it easy for participants to share your message.

# 3. Analyze your data.

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**Review funds raised** based on top fundraisers' connections to your organization.



Use data from previous campaigns or events to **add personalized notes** to your recruiting emails and tap into the loyalty of past participants.

For example, add a personal note to recruiting emails, such as: "Thank you for raising \$X last year." or "Thank you for being one of our top 50 fundraisers last year."

## 4. Build targeted recruitment emails.

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- + Segment your audiences and tailor messages to them.
- + Examples:
  - **Create email audiences** based on past participation and team membership.
  - **Send targeted messages**, such as an early announcement email and follow-up messages encouraging past participants to sign up.
  - **Ask your most active fundraisers** to ask their friends to sign up.
  - Next, **send to your entire audience**.  
(Mention in a newsletter or maybe send a unique recruitment message.)
  - Be sure to **exclude those registered** from recruitment emails, OR send them a personalized message with a registration discount code (for event sign-ups) that they can share with their contacts.



## 5. Do a “soft” launch.



Ask staff, board members, and your most involved constituents to register to begin fundraising ahead of the official launch.

**The result:** When others come across your campaign, they’ll see that it already has interest.

### **BONUS:**

A soft launch can also help you identify any bugs or confusion with registration or donation processes before your campaign really kicks off.

# 6. Reach beyond your email list.

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## Think about other communications channels:

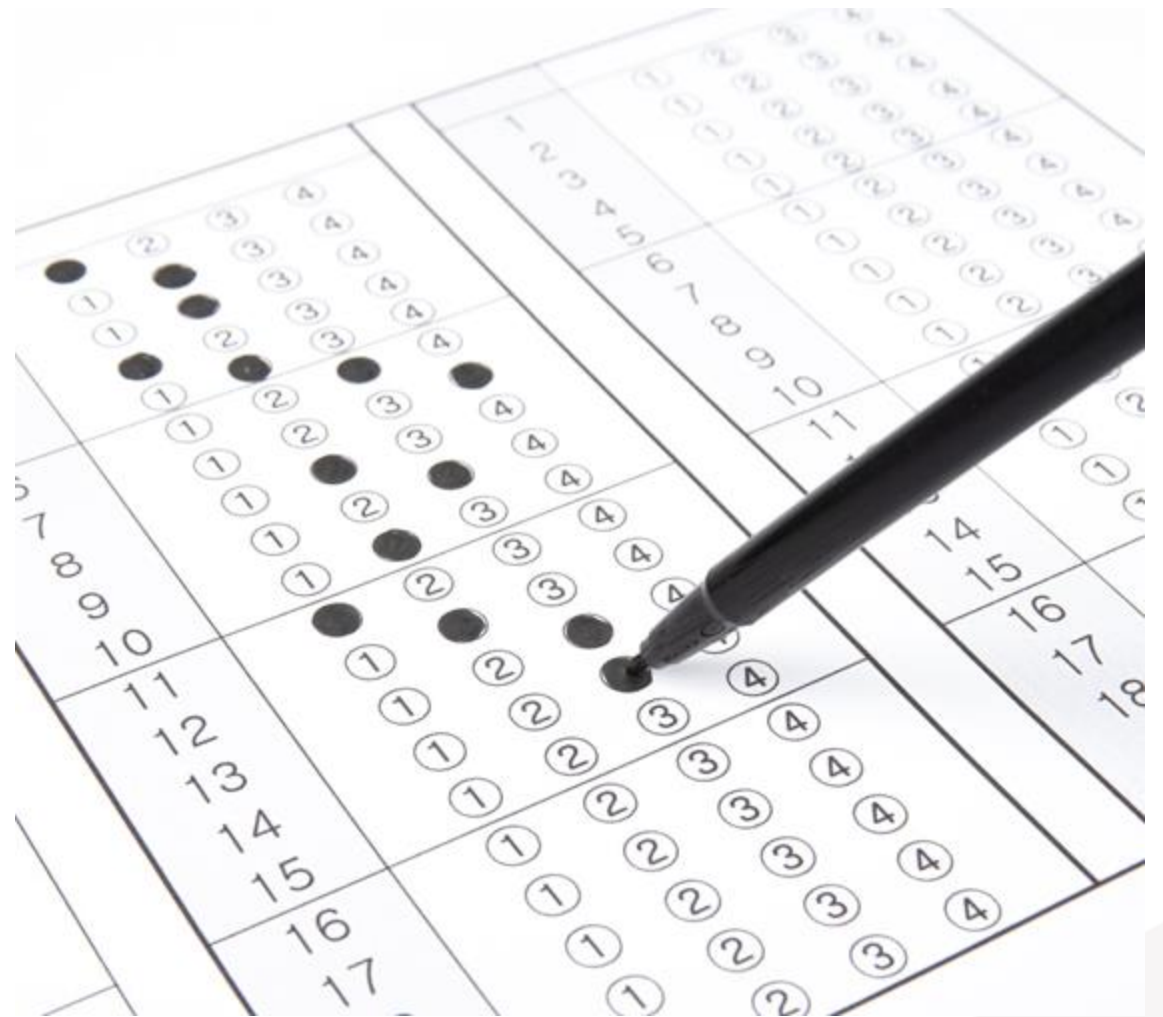
- + social media
- + your website
- + signs at your organization's events
- + public service announcements
- + local morning TV news shows

## Look at other groups who might be interested in supporting your campaign:

- + **Your campaign sponsors.** See if you can visit the company to let their employees know about your campaign.
- + **Visit or call shops near your event location.** Ask if they'd like to start a team and if you can leave campaign info for their employees or customers.
- + **Rinse and repeat** with schools, churches, synagogues, mosques, civic groups, scout troops, sororities, fraternities, etc.

## 7. Make registration easy.

- + Keep the number of online form fields to a minimum.
- + Explain how you'll use their information.
- + Add some celebratory language.



# 4 Ways to Inspire and Enable Your Participants to Raise Funds

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# 1. Ease them from registrants to fundraisers.

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- + Include prompts on your registration confirmation page and email.
  - Thank participants and ask them to invite friends and family to donate.
  - Link to a video or tip sheet with basic steps to start fundraising.
  - Highlight a button they can click to set up their fundraising dashboard/page.
- + Start a new registrant email welcome series.
  - One email might encourage registrants to set up their fundraising page.
  - The next might include steps and templates to help them start fundraising.
  - The next might include a video from a top fundraiser offering tips on how to fundraise.

## 2. Give them powerful, easy-to-use tools.

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- + Easy event/campaign registration
- + Simple, yet effective email tools
- + Gamification
- + Progress meters

## 3. Offer outstanding coaching and support.

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- + **Email templates** they can use to solicit donations from friends and family.
- + **Tips and examples** for fundraising success
  - Include a video from one of your top fundraisers offering their tips.
  - Add an inspirational story about someone who benefitted from your mission.
- + **Call** to ask how things are going and to thank them for their work.

## 4. Provide incentives.

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An **extra nudge** to keep up the fundraising momentum for participants who reach specific fundraising milestones:

- + Online gift card
- + T-shirt
- + Day of event premium
- + Other gift



# 4 Ways to Improve Participant Retention



# 1. Provide a streamlined process.

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Event management technology can help you:

- + Seamlessly **register and check in** participants
- + **Accept donations** on event day
- + Provide that data to you in real-time so you can **create a better event-day experience** for your participants AND your staff

## 2. Say thank you – more than once.

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- + Thank them **throughout the campaign or event.**
- + Send a **wrap-up email** (and call your top fundraisers) and share:
  - How much was raised due to their support
  - What your organization will be able to do with the funds raised
- + Host a **wrap-up event** (virtual or in-person) to recognize their work.
- + **Recognize them** in your email newsletter and at events.

## 3. Communicate participant's impact.

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- + Take every opportunity (from the moment they register) to thank participants and **remind them of their impact** on your organization's mission.
- + This approach will help to **keep them motivated** to:
  - Continue fundraising
  - Return as participants for your next peer-to-peer events and campaigns.

## 4. Listen.

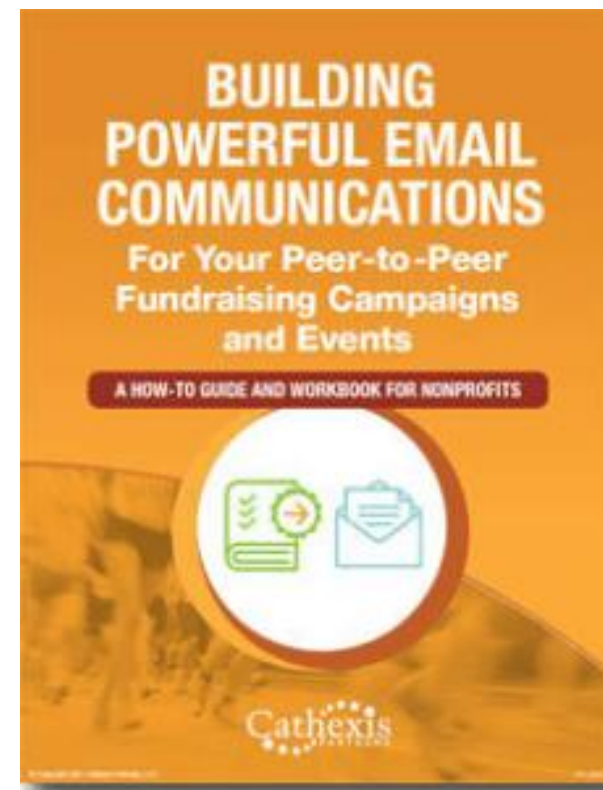
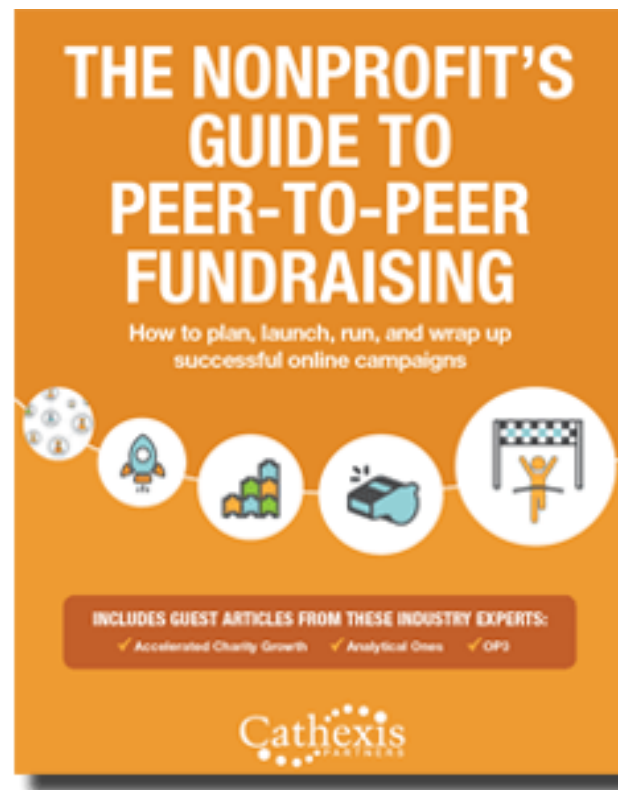
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- + Use **short online surveys** to ask for feedback during and after the campaign.
- + Host regular **get-togethers** (in-person or virtual) to solicit feedback and let them share lessons learned.
- + Make your **contact information** easy to find on your website and communications.
- + Offer an **incentive** to people who complete a survey or provide feedback in other ways to encourage more responses.



# Resources

[cathexispartners.com/resources](https://cathexispartners.com/resources)





# Thank you for joining!

For more information on Qgiv's fundraising platform, contact:

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