

Meet the Donors:

How to Send a Survey in 4 Easy Steps

Let's begin.

Understanding your donors matters. So much. And, sending a survey is great way to get to know them better. Surveying donors may feel like a massive undertaking (been there), but you can keep it simple too.

Plus, great things happen when you survey your donors. Things like:

- 1 Increasing your donor retention rate. (Woot!)
- 2 Making better fundraising decisions. (Yay, data!)
- 3 Deepening your donor relationships. (Gotta love it!)

Ready to give surveying a go? Here are the steps to make it happen.


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How to Send a Survey in 4 Easy Steps

- 1 Create your project timeline
- 2 Choose your survey software
- 3 Pick your questions*
*3A: Ready the survey using your choice of software of course! :)
- 4 Send/announce your survey and encourage participation

Step 1: Create your project timeline

An hour of planning can save you hours of doing. That's why it's always the first step. To start planning, grab a calendar, detail the project tasks, and assign the tasks a calendar date. It really is that easy. (And even easier if you use this example below. Wink, wink.)

Mon	Tue	Wed	Thu	Fri
1	2	3	4 Today!	5
8	9 Create your project timeline	10	11 Select your survey software	12
15	16 Pick your questions	17	18 Ready your survey	19
22	23 Send/announce your survey	24	25 Send/announce reminder (1 of 3)	26
29 Send/announce reminder (2 of 3)	30	31 Send/announce final reminder (3 of 3)	 Survey deadline: End of day, August 31	

Step 2: Choose your survey software

Analysis paralysis is totally a thing, and it often stops you in your tracks. Options are awesome but so is guidance. The following survey tools are some of the best on the scene. Knowing your needs, style, and budget can help you land on the right software faster.

Option #1



Survey Monkey

<https://www.surveymonkey.com/>

Option #2



Google Forms

<https://www.google.com/forms/about/>

Option #3

Typeform

Typeform

<https://www.typeform.com/>

Step 3: Pick your questions

Let the fun begin! What do you want to know? Why a donor made a gift or which program they want to hear about most? Maybe you want to know their favorite color. You can ask a donor almost anything! Be sure to ask a mix of open-ended questions along with close-ended, rating, or multiple choice questions too. Need a little help on the question front? Here's more than a few to boost your brainstorming.

- What motivated you to make your last donation? (Thank you again by the way!)
- Of our many programs, which one do you like to hear about and support most?
- Would having your donation matched dollar-for-dollar encourage you to give again?
- Does pineapple belong on pizza?
- Do you ever ask friends to donate to a personal fundraising page?
- What is the most important value you live by?
- When you finding yourself scrolling through social media, which app do you use most?
- How much do you agree with this statement: "I know how my donation is being spent."
- Do you remember reading/receiving our latest newsletter?
- Are you or your family interested in volunteering opportunities?
- How likely are you to tell a friend, family member, or colleague about our organization?
- What is your hope for the people we help?
- Is there something we can do to improve your giving experience with us?
- Have we told you lately how wonderfully amazing you are?
- What email address would you like us to use when sharing stories with you?
- What could we do better or differently to update you on the impact your gift has made?
- Is there anything you want more of or less of from our organization?
- What's the one way we could best show our appreciation for you?

Step 4: Send/announce survey and encourage participation

You're almost there. You built your survey. It's ready to go. Now, what? Send it out into your donor world. Use email and social media to spread the word. Don't sleep on reminders either. The more the merrier! Here's additional tips for getting your donors to complete your survey.

- Write intriguing email subject lines

Survey says... | We have big ears | She said what? | Think we can do it? | Quick favor, [Name]?

- Put those social media channels to work

Use your social media channels to share your survey links. Include a video of someone completing the survey? ("Look at how quick this is!") Don't be shy about using GIFs or memes!

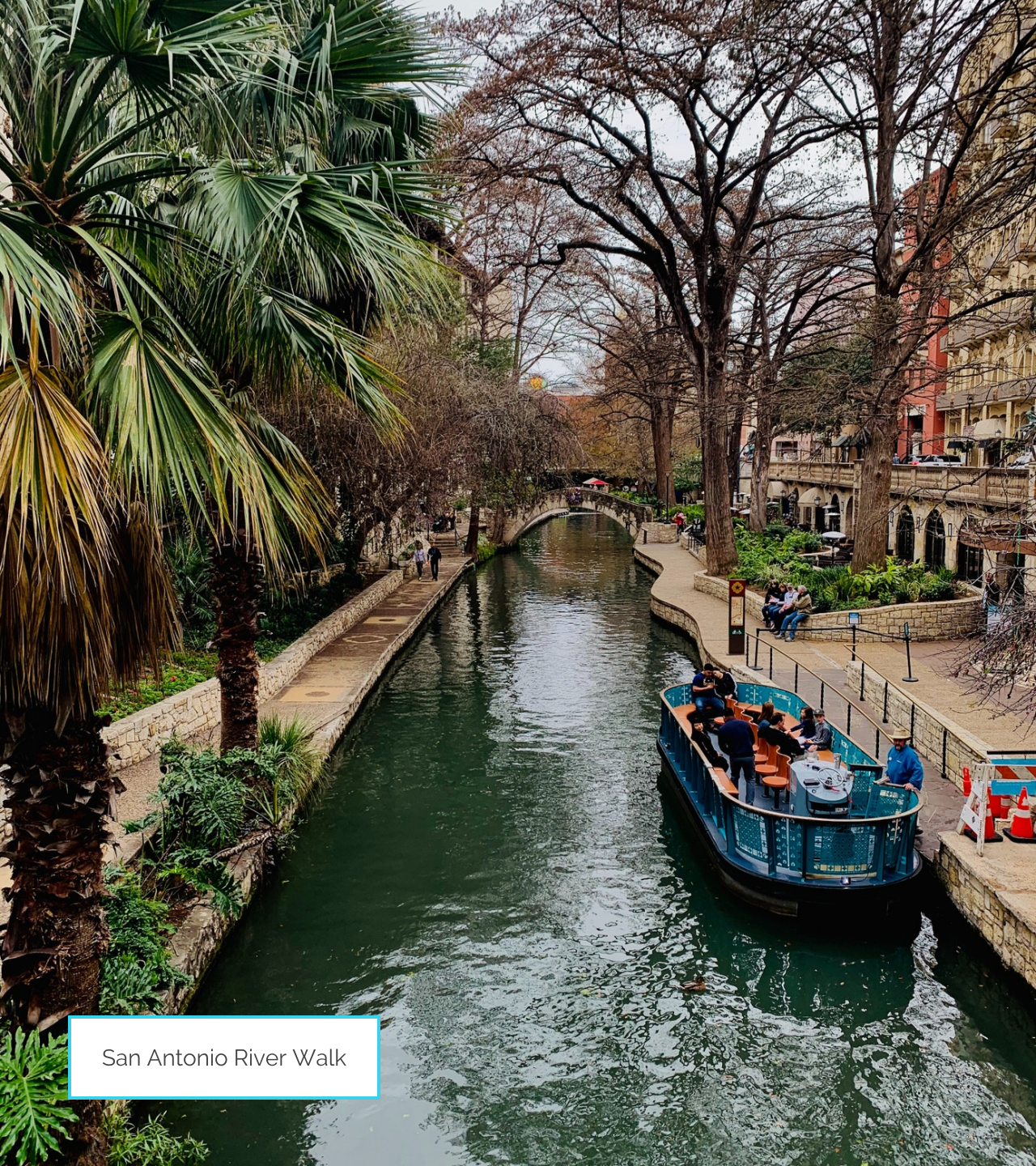
- Tease an incentive

Totally not required but an incentive does typically boost participation. Is there an in-kind gift you can use? A gift card to a local restaurant is always a winner. Or make it mission related. Perhaps a one-of-kind painting by furry paws?

- Share social proof

"Mary, a wonderful donor just like you, wrote '.....'."

"We love this response from Jim. Can you relate?"



San Antonio River Walk

Say hi. Send a pun. Make my inbox smile.

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It would make me so happy if you joined me at this year's
Nonprofit Storytelling Conference in San Antonio.

Learn more at nonprofitstorytelling.com.