Using AI to Create Personalized, Automated Donor Journeys

DoingGoodAgency.com

Introduction

Why Donor Journeys Are the Secret to Stronger Fundraising

In today's digital landscape, nonprofits are working harder than ever to keep up with the growing expectations of their supporters. Fundraising isn't just about one-time asks and year-end appeals anymore—it's about building a donor experience that feels thoughtful, personalized, and rewarding. That's where donor journey mapping comes in.

At Doing Good Digital (DGD), we specialize in creating transformative digital fundraising strategies powered by automation, personalization, and data. We believe that mapping and automating donor journeys is not just a best practice—it's essential for sustained revenue growth, donor retention, and overall program efficiency. Whether you're trying to reduce donor churn, increase monthly gifts, or improve donor lifetime value, effective journey mapping can be a game-changer.
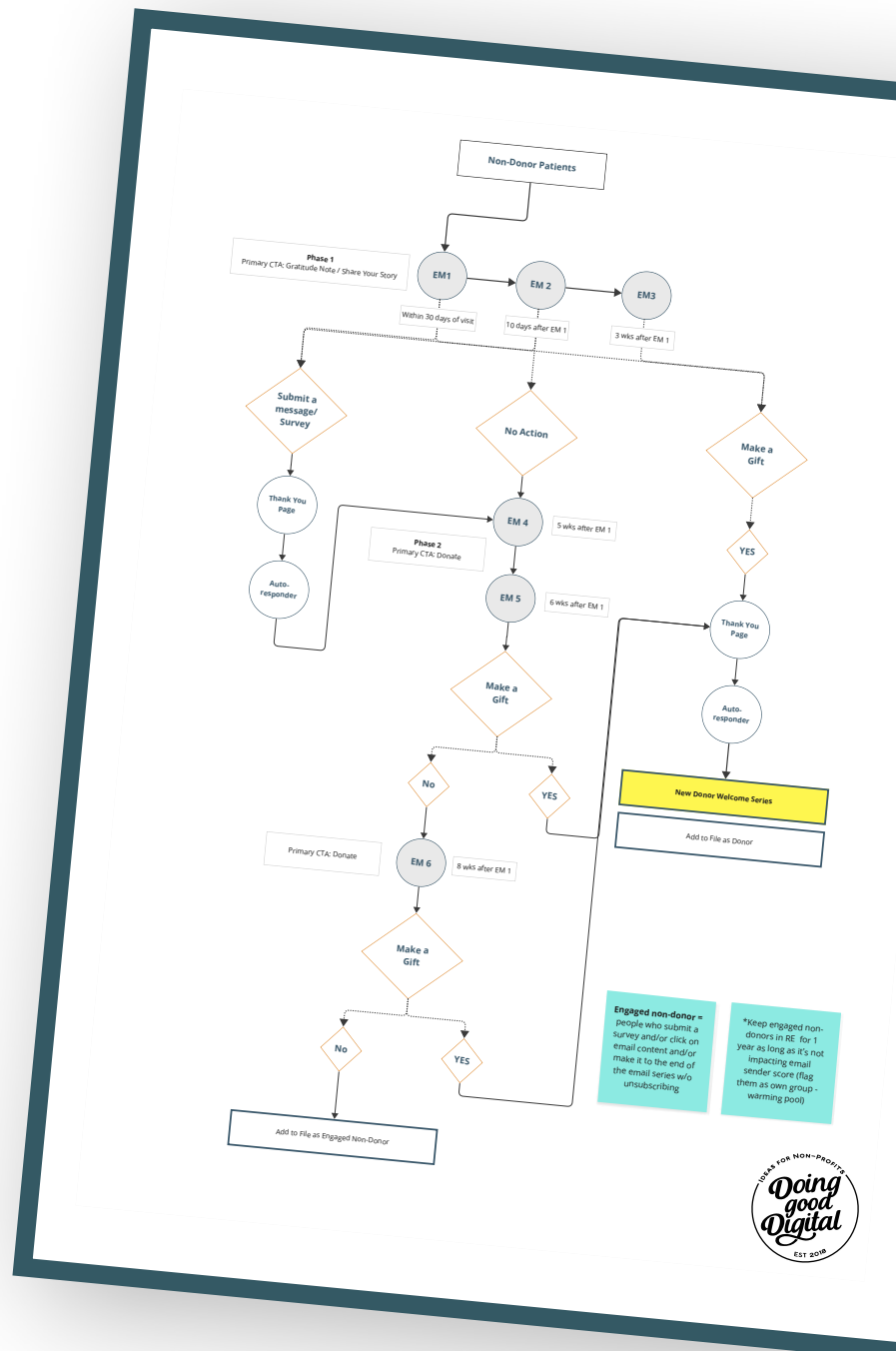
Personalization + Automation

Personalized communication is no longer a nice-to-have—it's expected. A donor who receives content tailored to their giving history, interests, and engagement level is far more likely to continue giving and deepen their support over time. That's where automation becomes critical.

Automation allows nonprofits to:

- ⊘ **Ensure consistency in messaging**

- ⊘ **Scale meaningful donor engagement**

- ⊘ **Alleviate the burden on small teams**

- ⊘ **Deliver timely, relevant outreach even during high-volume seasons**

Research shows that segmented and personalized email campaigns can generate up to 760% more revenue than one-size-fits-all blasts. By combining personalization and automation, you create scalable, data-driven experiences that feel one-to-one.

Introducing A New Concept:

Leveraging AI for audience building
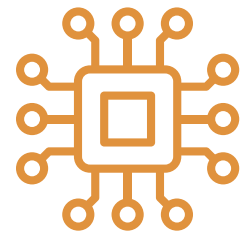
Building personalized, automated journeys can be a daunting and complicated task. It's overwhelming to think through all the possible branches that a donor may take in their personalized journey. Therefore most organizations never get around to building them. For example once you send someone through a monthly upgrade series, and they don't respond, where do you send them next? What if they do respond?

Enter AI. With Dataro, we pioneered a methodology that leverages AI to build audiences for journeys on a daily basis. We let AI do its thing to identify which individual constituents are ripe for a personalized journey, while ensuring the right suppressions are in place. The result is a fully personalized experience based on giving history or content they are interested in.

Follow along in our five-step process to see how you can leverage AI to build audiences daily. →
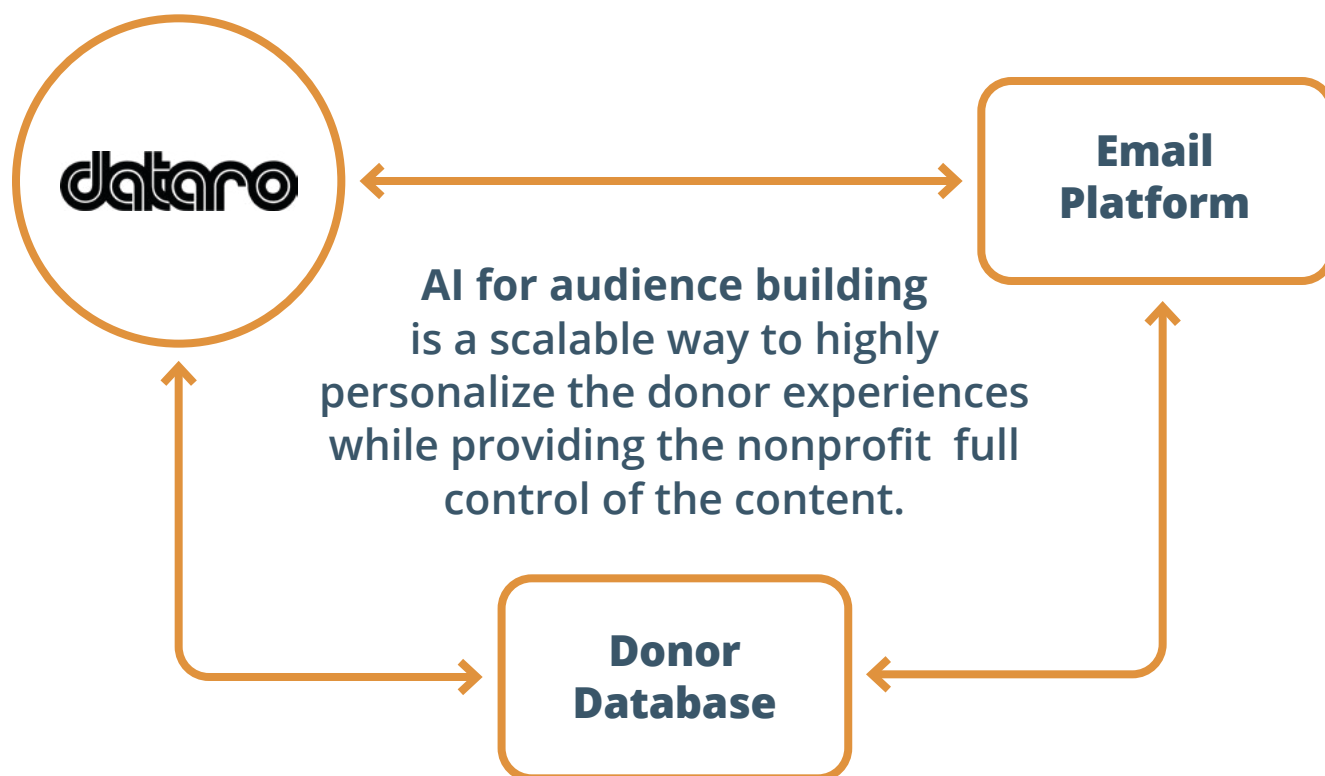
Step 1

1 — **2** — **3** — **4** — **5**

Identify AI Platform
We recommend Dataro. Dataro connects directly to your CRM like Raiser's Edge, Salesforce, Virtuous or Hubspot.

dataro → **Email Platform**

AI for audience building
is a scalable way to highly personalize the donor experiences while providing the nonprofit full control of the content.

Donor Database

Step 2

1 — **2** — 3 — 4 — 5

Identify Donor Journeys
Identify your ideal journeys and/or
Dataro can identify journeys that
are right for your audience:

• **Recurring churn risk**
• **Recurring upgrade**
• **Recurring upgrade**
• **Reactivation potential**
• **Mid level upgrade**
• **Planned giving upgrade**
• **Unengagement risk**
• **Lapse risk**

Step 3

1 — **2** — **3** — 4 — 5

Create Email Content
Create content and pre-build a 2-6
email automated series in your email
platform for each journey

Step 4

1 — **2** — **3** — **4** — 5

Define Suppressions for Each Journey

• **Donor less than $500**
• **No upgrade journey in last 3 months**
• **Do not run June, Oct, Nov, Dec**
• **No fundraising campaign in last 2 weeks**
• **Suppress volunteers**

Step 5

① —— ② —— ③ —— ④ —— ⑤

Connect your systems so that when an audience is identified by Dataro, it will automatically trigger a journey in your email platform. We prefer Dataro because it integrates with major CRMs and you could achieve an automated journey process if you are on the right systems. At Doing Good Digital, we specialize in the content and configuration of this process in the following platforms:

Dataro, Raiser's Edge and Luminate Online

Dataro, Raiser's Edge and Engaging Networks

Dataro, Raiser's Edge and any of the native integrations that exist with Dataro, listed here.

Your constituents are interacting with you you a daily basis and providing you with clues to their motivations. In sending the right targeted message, your organization can create more meaningful experiences for donors to move them through your ideal donor journey.
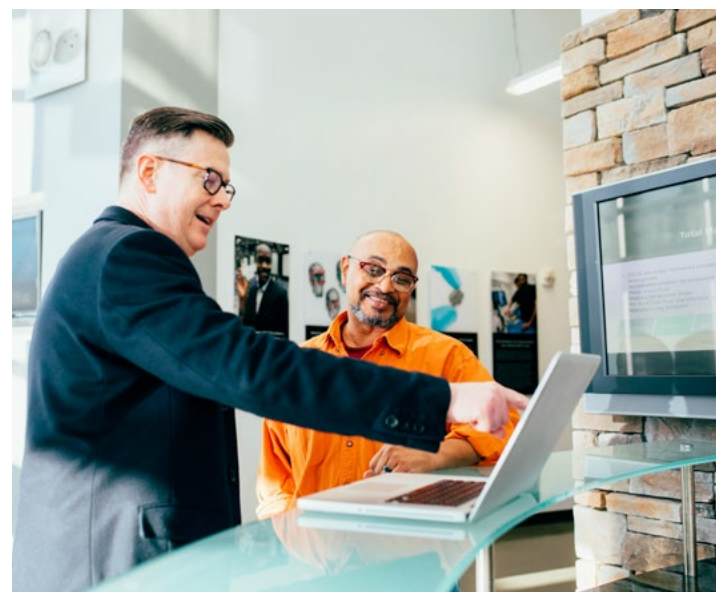
AI for Content?
Maybe Not Yet.

We are big believers in AI for audience building and crunching massive amounts of data. However the jury is still out on how effective and reliable AI can be for content creation. Therefore we believe that pre-building content and journeys in your email, website and/or advertising platform(s) allows for more guard rails and control.

We like leveraging AI to help with some of your journey content (ex. copy and design), but the final versions of each automated journey can be all edited and approved by someone at your organization.

We also recommend creating guard rails for your audiences by using suppressions. Suppressions both in Dataro or your email platform will ensure that you are not over-communicating with constituents who show up in multiple audiences, or communicating at all with other constituents (ex. major donors).

AI for Testing
and Optimization

Once your automation and personalization strategy is in place, we can leverage AI for optimization. For larger organizations we recommend testing different content and strategies for each journey so that you can optimize over time. The results will be analyzed and incorporated into future audience building and potential content recommendations from Dataro.
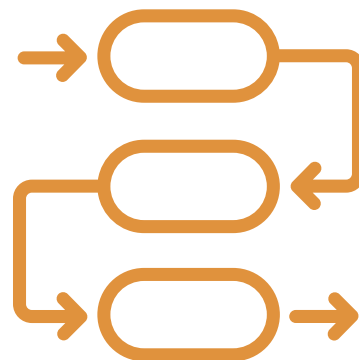
High-Impact Donor Journeys That Drive Results

Some journeys are consistently effective when built and deployed well. Here are a few we recommend:

1: Single Gift to Recurring Donor Upgrade

Sample Inclusion/Exclusion:
Non P2P donor, non major gift prospect, no automated journey last 90 days

Sample Content:
Focus on impact and ease of monthly giving

Recommend 3-5 touchpoints with social proof and urgency

Share stories of current monthly donors and what their support makes possible

2: Prospect to First-Time Donor Conversion

Sample Inclusion/Exclusion:
Not new to file in last 90 days, non P2P donor, non major gift prospect, no automated journey last 90 days

Sample Content:
Educate, inspire, and reduce barriers to entry

Use storytelling and mission-driven CTAs over 4-6 emails

Include testimonials or short videos to build emotional connection

High-Impact Donor Journeys That Drive Results

3: Lapse Prevention Journey

Sample Inclusion/Exclusion:
No gift in last 14 months, non-major donor

Sample Content:
Personal, heartfelt content aimed at re-connection

Include stewardship-style messaging and impact recaps

Highlight what the donor made possible in the past and what they can continue to support

4: Mid-Level Donor Upgrade Journey

Sample Inclusion/Exclusion:
No gift last 14 days, do direct mail last 30 days, non major gift prospect

Sample Content:
Highlight the tangible impact of increased gifts

Pair with high-touch tactics like personal emails or phone calls

Invite to exclusive events, insider updates, or offer naming opportunities

Additional segmentation could be considered such as interest categories or giving history.

Donors are most receptive when communications feel **timely, relevant, and aligned with their interests**—these journeys help make that happen.

Journey Recommendations

At Doing Good Digital, we recommend the following considerations for a successful journey:

Length: 3-7 emails per journey depending on the goal

Cadence: Weekly or bi-weekly intervals

Segmentation: Consider additional segmentation for interests or previous giving history or behavior

Customization: Use donor name, past giving, and interests to guide content

Key Messages: Impact storytelling, gratitude, exclusivity, and future vision

Content: Videos, high impact imagery, GIFs

CTAs: "Upgrade My Gift", "Join Monthly Giving", "Make an Impact Today", "Stay Connected"

Testing: Monitor performance regularly and optimize based on open rates, CTRs, and conversion data
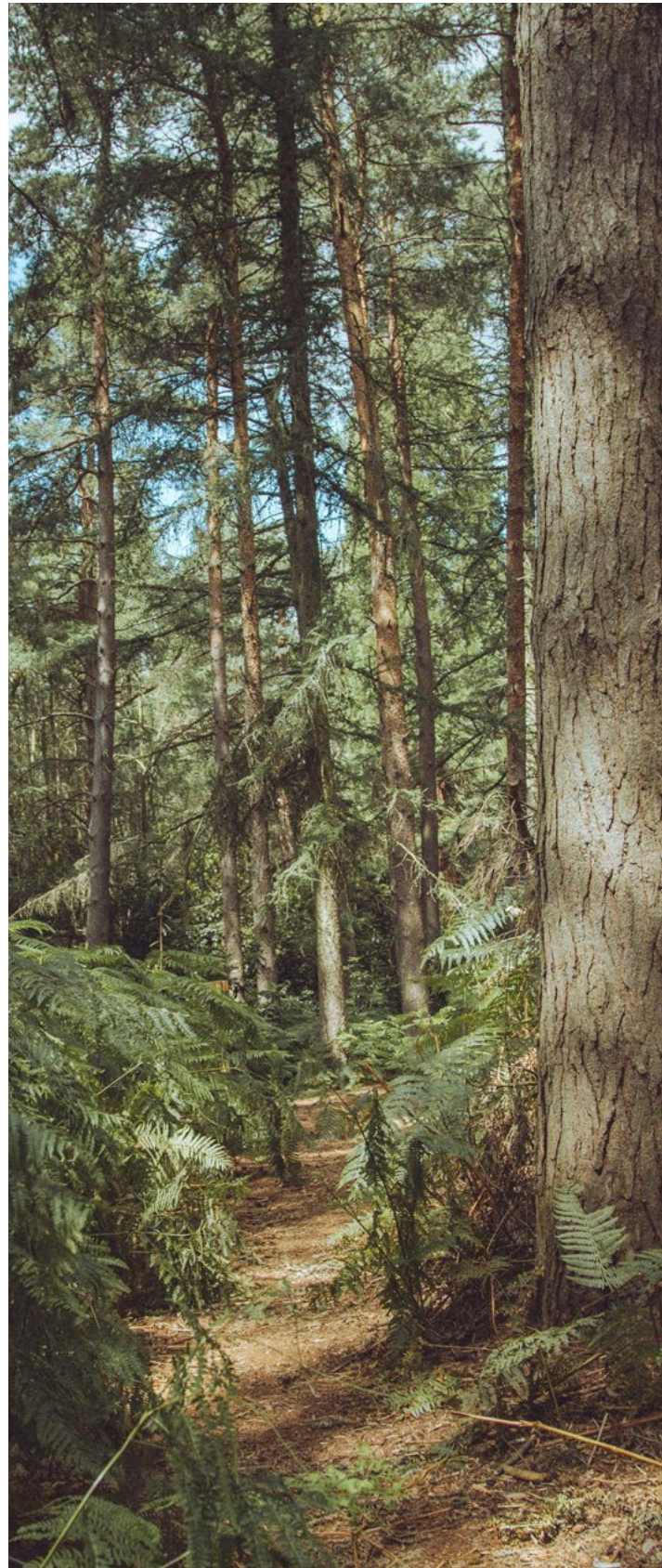
Why Mapping Matters

For an effective strategy we recommend brainstorming all possible journeys - you might come up with 40-50 different journeys for your organization. Don't forget to consider P2P, volunteers, employees and other audiences aside from regular annual fund donors.
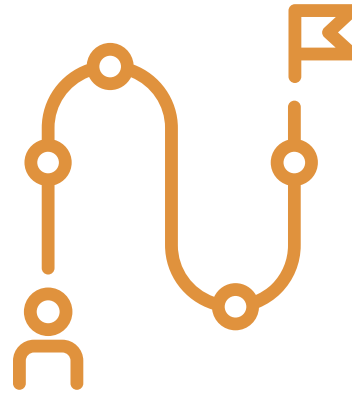
Donor journey mapping should be treated as an annual strategy. It gives your fundraising team a bird's eye view of what content is needed, where donors are falling off, and how teams can work together more cohesively.

Journey mapping:

Reveals communication gaps and opportunities

Unites fundraising, stewardship, marketing, and major gifts teams

Highlights missing content and overlooked audiences

Reduces unnecessary suppressions

Creates a cohesive experience from first gift to major giving

Provides a strategic baseline for adapting to real-time needs

As donor expectations evolve, journey mapping keeps your organization responsive, aligned, and strategic. It ensures no donor is forgotten, and no opportunity is missed.

Let's Build Something That Works All Year

Doing Good Digital has helped hundreds of organizations turn passive communications into powerful donor journeys that move the needle. Whether you're just starting out or ready to refine your program with AI-powered segmentation and customized content, our team is here to help you:

Journey mapping:

Drive better donor retention

Unlock more recurring revenue

Increase donor lifetime value

Expand your acquisition reach with smarter strategy

Case in Point: After implementing a donor journey strategy for one mid-sized nonprofit client, DGD helped increase monthly donor retention by 24% and re-engaged over 3,000 lapsed donors within six months.

Let's map your next journey—and **make every step count.**

Contact Us Today:
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