



# DONOR RETENTION PLAYBOOK

**How Top  
Nonprofits Use  
SMS to Convert  
One-Time Givers  
Into Lifetime  
Supporters**



The step-by-step playbook for nonprofit fundraisers who want to build lasting donor relationships and not just one-time transactions.

Trusted by  
**American Red Cross | UNICEF Mexico | 3,000+  
Organisations Worldwide**

## **360 SMS App**

Salesforce-Native Multi-Channel Communication for Nonprofits



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# Executive Summary

*"81% of first-time donors never give again. But nonprofits using SMS-driven engagement are changing that and building the sustainable donor bases their missions depend on."*

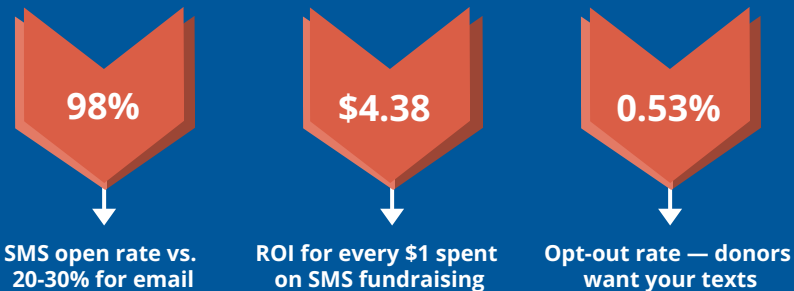
The nonprofit sector is facing a donor retention crisis. Despite record generosity in recent years, most organisations are losing the majority of their first-time donors before they ever give a second gift. The cost of this churn is enormous—not just in lost revenue, but in the wasted investment of acquiring donors who never come back.

The solution is not to work harder. It is to communicate smarter. This playbook shows exactly how forward-thinking nonprofits are using SMS—the highest-engagement channel available to fundraisers today—to build relationships that convert one-time givers into lifetime supporters.

## What You Will Learn

1. Why SMS outperforms email, direct mail, and phone for donor retention
2. How to map SMS touchpoints across the full donor journey
3. The proven 30-day first-time donor sequence that drives second gifts
4. How to reactivate lapsed donors with targeted messaging
5. Real results from American Red Cross and UNICEF Mexico
6. The metrics that matter and how to track them in Salesforce NPSP

## The Numbers That Make the Case



Sources: M+R Benchmarks 2025 | CTIA 2025 Wireless Industry Survey | Fundraising Effectiveness Project

Every strategy in this guide has been tested by real organisations using 360 SMS App, integrated directly with Salesforce NPSP. The playbook is practical, step-by-step, and built for development directors and fundraising teams who need results and not theory.

# Why SMS Is the Retention Channel

Email inboxes are saturated. Direct mail is slow and expensive. Phone calls go unanswered. Nonprofits need a channel that reaches donors where they actually are—and that means mobile. SMS has fundamentally different engagement dynamics than any other fundraising channel. It is not just faster. It is personal, conversational, and immediate in a way nothing else can match.

Metric	SMS	Email	Direct Mail	Phone
Open Rate	98%	20-30%	~5%	~10%
Read Within	<5 minutes	24-48 hrs	Days	Varies
Response Rate	45%	6%	5%	15%
Cost Per Touch	0.03-0.05	\$0.02-0.05	\$0.50-1.00	5-15
Personalisation	High	Medium	Low	High
Two-Way Convo	Yes	Limited	No	Yes
Opt-Out Rate	0.53%	0.5-1%	N/A	N/A

## Beyond SMS: 15+ Channels, One Platform



All 15+ channels are managed from one Salesforce-native dashboard. No integration headaches, no platform switching, no lost donor data.

# From First Gift to Lifetime Supporter

The real work of retention happens in the weeks and months after that first gift. SMS is the most powerful tool for this critical period.

## Stage 1



### First Contact & Discovery

The donor discovers your mission. SMS keyword-triggered responses, text-to-donate workflows, and automated lead qualification convert curiosity into commitment before a gift is even made.

## Stage 2



### First Gift

The moment of commitment. An immediate SMS thank-you within 60 minutes sets the tone for everything that follows. Most organisations send a receipt. Best send a story.

## Stage 3



### Gratitude & Impact (Days 1-30)

The critical retention window where 81% of donors fall through the cracks. SMS drip campaigns keep donors engaged with impact updates, multimedia storytelling, and personalised appreciation.

## Stage 4



### Ongoing Engagement

A 40/30/20/10 message mix works best: 40% impact stories, 30% volunteer and event invites, 20% fundraising asks, 10% cause-adjacent content. Donors who feel connected give more and more often.

## Stage 5



### Re-ask & Upgrade

360 SMS integrates with Salesforce NPSP to segment donors by giving capacity, cause preference, and engagement history. The right ask to the right donor at the right moment drives second gifts and upgrades.

## Stage 6



### Lifetime Advocacy

Retained donors recruit. Peer fundraising links, volunteer invitations, and social sharing CTAs delivered via SMS turn loyal donors into active champions for your mission.

# The 30-Day First-Time Donor Sequence

The first 30 days after a first gift determine whether a donor comes back. This sequence converts the critical window into a relationship-building engine automatically.

Day	Focus	Why it Works
0	The Immediate Thank-You	Speed signals value
1	The Personal Touch	Makes donors feel seen
3	Impact in Action (MMS)	53% higher conversion
7	The Feedback Request	Input builds partnership
14	Deeper Storytelling	Personalise by interest
21	Community Invitation	Bridge to support
30	The Soft Next Step	Natural second gift

*"Nonprofits that implement a structured 30-day onboarding sequence see 65-75% higher engagement rates and 12-18% conversion to a second gift within 90 days."*

— 360 SMS App client data, 2025 — based on analysis of 500+ nonprofit SMS campaigns



# Winning Back Lapsed Donors

**5-10x**

Cheaper to reactivate than acquire new donor

**40%+**

Higher lifetime value for reactivated donors

**8-12%**

Reactivation rate with SMS sequences

## The 5-Message Reactivation Sequence

### The Honest Re-engagement

"Hi [Name], we've missed you! A lot has happened at [Org] since your last gift in [date]. Here's what your support made possible: [impact stat + link]"

### The Soft Invite

"Interested in reconnecting? We're hosting [upcoming event/webinar]. No commitment. Just come see what's new. [RSVP link]"

### The Personal Callback

"Last time you gave, it was to support [cause]. Here's a quick update on exactly that work: [specific outcome story]"

### The Feedback Ask

"We'd love to know what would bring you back as a supporter. Reply YES and we'll send you a quick 2-question survey. Your answer shapes how we engage donors like you."

### The Gentle Re-ask

"If you're ready to get involved again, here's an easy way to start: [small gift link] or reply VOLUNTEER if that feels more natural right now."

# Segmentation: The Engine Behind Success



## 1 Giving Level

First-time, repeat, recurring, or major gift (\$5K+). Each segment gets a different cadence, ask size, and content type.



## 2 Cause Preference

Donors who gave to programme A get updates about programme A and not generic news that does not connect.



## 3 Engagement Style

High-engagement donors receive 3 messages per month. Low-preference donors receive 1. Respecting signals reduces opt-outs.



## 4 Lifecycle Stage

New (under 3 months), active (gave in last 12 months), or lapsed (over 12 months). Each stage has its own playbook.

## What Happens When You Over-Text

- Sending more than 4 messages per month to low-engagement donors
- Generic blasts with no personalisation or cause relevance
- A fundraising ask in every message including the thank-you

360 SMS tracks opt-out rates in real time inside Salesforce so you can course-correct before it becomes a pattern.

# Success Story

## American Red Cross

Scaling Crisis Communication to Millions With SMS Automation



American Red Cross

### The Challenge

The American Red Cross established in 1881 and responsible for approximately 40% of the nation's blood supply faced a fundamental communication problem during disaster response. Volunteers were using personal cell phones to contact disaster victims individually, creating an unscalable, unreliable system that broke down exactly when it was needed most.

- Manual calling stretched volunteer teams thin and created long response delays.
- No scalability: connecting with millions of disaster victims simultaneously was impossible.
- Onboarding bottleneck: setting up 10,000+ users and volunteers took weeks of manual work.

### The 360 SMS Solution

- **Broadcast at scale:** messages sent from Salesforce reports to millions simultaneously directing victims to help.
- **SMS Drip Campaigns:** automated follow-up sequences checked on relief-seekers without manual intervention.
- **Keyword triage:** SMS chatbots processed replies like 'HELP' to automatically prioritise the most critical cases.
- **DIY volunteer onboarding:** CSV upload reduced new volunteer setup from weeks to minutes - no developer required.
- **Delivery tracking:** real-time delivery reports kept outreach teams informed across all operations.

"360 SMS distilled weeks' worth of work into minutes and work that would have otherwise been spent onboarding volunteers or on calls with limited reach."

— American Red Cross Implementation Team

**Millions**

Simultaneous conversations managed

**Weeks to Minutes**

Volunteer onboarding time reduction

**100%**

User adoption increase

# Success Story

## UNICEF Mexico



Driving Donor Pledges and Fundraising Efficiency  
With Multi-Channel Engagement

### The Challenge

UNICEF Mexico's fundraising team needed to close more donor pledges faster, while reducing the administrative burden on frontline fundraising managers and volunteers. Manual call logging was consuming valuable team time, and donor interactions were not being captured consistently in Salesforce and creating blind spots in the donor relationship pipeline.

### The 360 SMS Solution

- **Multi-channel engagement:** 360's 11-channel platform enabled managers to connect with donors on SMS, WhatsApp, and phone — all from one Salesforce interface.
- **Automatic call logging:** donor interactions captured automatically, eliminating manual entry and ensuring a complete view of every relationship.
- **Smart call routing:** priority donors routed automatically to senior managers, reducing response time on high-value pledges.
- **Real-time analytics:** Salesforce dashboards gave management instant visibility into fundraiser performance and campaign effectiveness.

**4x**

More donor pledges  
closed per fundraiser

**37%**

Faster fundraising  
quota achievement

**81%**

reduction in manual  
call logging time

# Measuring What Matters

Metric	Target Benchmark	Red Flag Zone
Donor Retention Rate	69%+ of prior-year donors give again	Below 45% — urgent action needed
Second Gift Rate	40%+ of new donors within 12 months	Below 19% — sequence failing
SMS Open Rate	98% baseline across segments	Below 80% — relevance issue
Click-Through Rate	8-12% on campaign messages	Below 3% — content not resonating
Opt-Out Rate	Below 0.5% per campaign	Above 2% — frequency too high
Reactivation Rate	8-12% of lapsed donors return	Below 3% — copy needs rework
Cost Per Retained Donor	Track monthly vs. acquisition cost	Higher than acquisition cost

## Your Donors Are Worth Fighting For. Let's Get to Work.

### Book a Demo

See 360 SMS with your Salesforce data. 30 minutes.



### Start Free Trial

7 days free. No credit card. Full platform access.



### Get a Retention Audit

Free 30-min consultation. We'll map your donor journey and find the gaps.



Salesforce Summit Partner | 50,000+ Users | 3,000+ Clients | 14 Years



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