

How to Create Donor Profiles

A Step-by-Step Guide by UpRaise Consulting

Understanding your donors and what drives them to give is critical to crafting effective fundraising, communication and engagement strategies. An excellent way to learn about your organization's audience is to develop donor personas. Donor personas are hypothetical representations of your ideal donors. They are based on real data you collect about your current and potential donor base, including demographics, behavior patterns, interests, concerns and personal histories with your organization.

Simply put, donor personas help you understand your donors and fundraisers so you can engage them more effectively.

Step 1: Segment your existing database by two key characteristics, for example:

Donor type: One-time, recurring donor, large donor, volunteer or newsletter subscriber.

Key interest: Education, arts and entertainment or health and wellness.

Step 2: Start learning about differentiating characteristics of each segment by conducting 3-5 interviews with each supporter type. The interview questions should be aimed at collecting data such as demographics (age, gender, occupation, marital status, annual income, family size); psychographics (daily activities, types of events you attend, do you volunteer, where do you find your information, what social media platforms do you use, what is your preferred communication platform, etc.); giving history (fundraising experience, donation frequency, average gift size, giving preference online or offline, etc.)

Step 3: Analyze your data to identify patterns that will help you develop 4 to 7 personas. You want enough personas to reach across demographics and interest levels, but not so many that it's hard to manage the program. Each persona should represent a segment of donors, but still remain specific enough that you can create hyper relevant and meaningful messages.

Step 4: Format your donor personas into straightforward, easy-to-read templates and share them across your entire organization, so everyone can understand who they're speaking to and craft their messages accordingly.

Step 5: Start segmenting all your communications by profile, focusing on content specific to their interest, demonstrating impact and tying in a relevant call to action. Re-evaluate how supporters are tagged and what communication they are responding to, adjusting when needed.

Here is an example of what a donor persona could look like:

Donor Anne (Naming your persona helps staff easily identify and refer to it.)

Demographics

- Age: 40-50
- Gender: Female
- Occupation: Electrical Engineer
- Household income: \$150,000 - \$175,000
- Location: Austin, TX

Identifiers/Traits (These should help you relate to the three key areas of focus.)

- Works full-time
- Married with two kids
- College graduate
- Gets information from blogs and newsletters
- Learns about nonprofit organizations through family, friends and colleagues
- Cares deeply about early childhood development, the environment and eating organically
- Likes to volunteer with her kids' activities

Giving History

- Average donation size: \$200
- Donation frequency: 2x/year
- Donation type: Online

Challenges (Are there any challenges that hold this person back from donating?)

How Your Organization Can Help (What can your organization do to solve this person's concerns about the issues?)

Quotes

(Include one or two real quotes from phone interviews with this target group.)

Objections (Identify the most common objections so your team will be able to meet the donor where they are.)

Support Assets (What can your organization provide the donor with to help move them through the giving cycle?)

Need more customized solutions to creating your donor profiles or want to learn about how to make the most of fundraising platforms like [Classy](#)? Contact [Matt Scott](#) at [UpRaise Consulting](#). For information about how to optimize Salesforce to make the most out of engaging your supporters, reach out to our friends at [Idealist Consulting](#).