

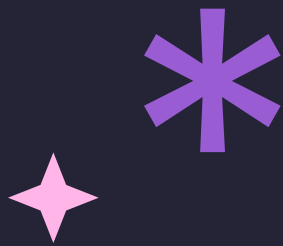
Team Playbook



Giving Day Follow-up



 **evertrue**



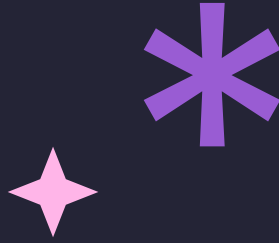
Contents

Welcome to your team’s comprehensive playbook for giving day follow-up.

Giving days are so important. But so are the days after. Don’t lose your momentum. We’ll show you how to structure follow-up; assess social media engagement, giving patterns, net worth, job changes, and interests; and get more major gift prospects into portfolios.

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Completed



DAY 1

Target: Giving day donors by designation

Action Item: Send a ThankView to all donors explaining the impact of giving day

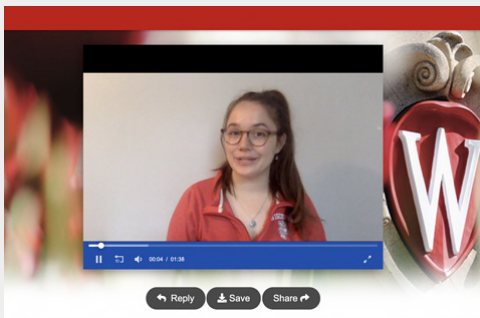
Suggested Teammate: Work-study students or student callers

Suggested Tech Tool: [ThankView by EverTrue: send personalized videos](#)

See it in action!

Step-by-step: [See how one organization sent 35k personalized ThankView videos from just 7 callers →](#)

Notes:

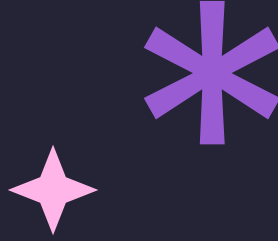


The University of Wisconsin Foundation and Alumni Association used personalized videos to thank every single donor.

[Read More →](#)



Completed



DAY 1

Target: Giving day donors in gift officer portfolios

Action Item: Send a ThankView to managed prospects from their assigned gift officer

Suggested Teammate: Major gift officers

Suggested Tech Tool: [ThankView by EverTrue: 1 to 1 videos to managed prospects](#)

See it in action!

EverTrue Tip: [Gift officers can easily record 1:1 personal videos to prospects and drop the video via hyperlink into an email.](#)

[Learn More](#)

Notes:



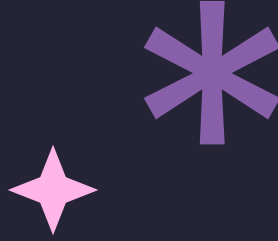
“The donor was so thrilled that he received a video message from a Senior Director. We ended up having a perfect visit. He will eventually become a major gift donor and an estate donor.”

Anne Murphy, Sr. Director of Development,
Oregon State University Foundation

[Read More →](#)



Completed



DAY 1

Target: All giving day donors

Action Item: Send a “What did you think?” ThankView

Suggested Teammate: Giving day program manager

Suggested Tech Tool: [ThankView by EverTrue: Video request link](#)

See it in action!

EverTrue Tip: [Humanize your Giving Day follow-up by putting a face to your “thank you” with a personalized video.](#)

[Hear how Florida State University did it.](#)

Notes:



“I sent a personalized ThankView to giving day donors saying, ‘Hi, I’m the program manager for FSU’s giving day - you know that thing you just gave to? Well, I organized it. Could you do me a big favor and let me know how you liked it or how you’d like to see it improve?’”

Nora Clark, Florida State University



Completed



DAY 10

Target: Giving day VIPs/matching challenge donors

Action Item: Send personalized, “hand”written notes from leadership to up-level your stewardship

Suggested Teammate: Vice President/Dean

Suggested Tech Tool: [Pledgemine by EverTrue](#)

[See it in action!](#)

EverTrue Tip: [Get your whole staff on board with giving day follow-up to make it feel extra-personal.](#)

[See how Williams College approaches this.](#)

Notes:



Psst!

“Hand”written notes have a response rate that is 21.3x higher than email.

[Learn More →](#)



Completed



DAY 10

Target: Digitally engaged, unassigned giving day donors

Action Item: Flag key giving day prospects (digitally engaged, unassigned, increased gifts) and keep in touch

Suggested Teammate: Giving day program manager

Suggested Tech Tool: [Flag key prospects in Signal](#)

See it in action!

EverTrue Tip: [Treat giving day as “day zero” – take these donors on a journey all year long.](#)

[Hear how the University of Miami does it.](#)

Notes:



Test out an outreach cadence on your key prospects by downloading our EverTrue DX Starter Kit.

[Download →](#)



Completed



DAY 10

Target: Giving day donors with wealth indicators (lives in wealthy neighborhood; net worth over \$1MM; C-suite job title)

Action Item: Review/revise ratings to uncover major gift prospects

Suggested Teammate: Prospect researcher

Suggested Tech Tool: [Windfall wealth insights in Signal](#)

[See it in action!](#)

EverTrue Tip: [Follow up 1:1 with giving day prospects that have additional wealth indicators – like those who made multiple gifts.](#)

[Hear how the University of Miami does this.](#)

Notes:



“Windfall takes a lot of the guesswork out of prospect research and has made finding new prospects really easy and accessible.”

Luciana Musto, Wilkes University

[Read More →](#)



Completed



DAY 30



Target: Digitally engaged, assigned giving day donors

Action Item: Celebrate double-show of affinity (giving + digital engagement)

Suggested Teammate: Major gift officer

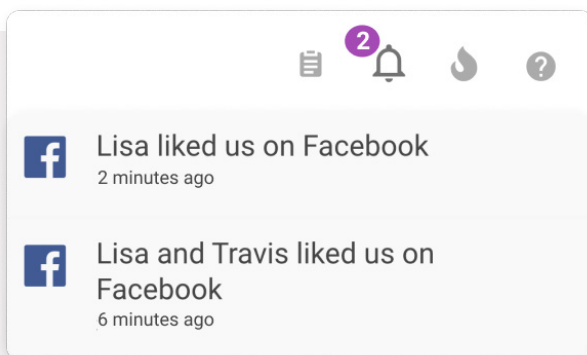
Suggested Tech Tool: [Track social media insights in Signal](#)

See it in action!

EverTrue Tip: [Look at who's engaging with your Facebook posts, continue engaging them with content, then refer those leads to gift officers.](#)

[See what this looks like in action.](#)

Notes:



Participation from alums who engage on Facebook is 3.4x higher than an average alum's participation.



Completed



DAY 30



Target: Digitally engaged non-donors

Action Item: Connect with folks who engaged with giving day content on Facebook but didn't give to create a sense of FOMO

Suggested Teammate: Alumni relations officer

Suggested Tech Tool: [Signal Facebook insights](#)

[See it in action!](#)

EverTrue Tip: [Pay attention to social media engagement! Segment your alumni by Facebook interests and activity to get personal \(and increase their giving\).](#)

[See the research we gathered from 20 million alumni.](#)

Notes: _____

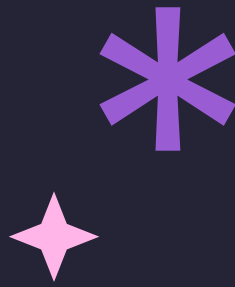


Learn how UMiami turned Facebook likes into gifts.

[Read More →](#)



Completed



DAY 60

Target: Rated, unassigned donors who engaged digitally since giving day

Action Item: Celebrate double-show of affinity (giving + digital engagement)

Suggested Teammate: Annual giving officer

Suggested Tech Tool: [Simple segmentation in Signal](#)

[See it in action!](#)

EverTrue Tip: [The end of giving day should be day 1 in a 90-day campaign to deepen donor relationships.](#)

[Here's how to make that happen](#)

Notes:



See how GWU searches for keywords within Facebook engagement data.

[Read More →](#)



Completed



DAY 90



Target: Donors who changed jobs since giving day

Action Item: Send “Congrats!” video to celebrate job changes

Suggested Teammate: Alumni relations officer

Suggested Tech Tool: [Career Moves by EverTrue](#)

[See it in action!](#)

EverTrue Tip: [Celebrate your alums’ job changes on a regular basis!](#)

[Take a look inside NC State’s quarterly Career Moves campaign.](#)

Notes:



“What graduates do outside of the institution after they graduate matters just as much as what they do on campus as a student. Anytime we can highlight or congratulate an alum, it says that we (the University) are paying attention and we celebrate with you.”

Reshunda Mahone,
Associate Vice Chancellor for Alumni Engagement and Annual Giving, NC State Alumni Association

[Read More →](#)



Completed



DAY 90



Target: Key giving day prospects

Action Item: Send check-in email to all flagged giving day prospects or managed prospects to build momentum

Suggested Teammate: Major gift officer/Giving day program manager

Suggested Tech Tool: [Search Facebook posts and contact reports for keywords like “Giving Tuesday”](#)

See it in action!

EverTrue Tip: [Searching past contact reports by keyword can help you close more gifts...](#)

[Check out how a gift officer did just that, and immediately closed two new 5-figure gifts!](#)

Notes:



Download our EverTrue DX Starter Kit to build a cadence plan to keep in touch with donors.

[Read More →](#)



Completed



DAY 90



Target: All giving day donors

Action Item: Send 3-month “look back” message to all giving day donors

Suggested Teammate: Giving day program manager

Suggested Tech Tool: [Simple segmentation in Signal](#)

See it in action!

EverTrue Tip: [It takes an average of 6.6 touchpoints to earn a meeting with a prospect.](#)

[Learn the ins-and-outs of polite persistence here.](#)

Notes:



Think of your next giving day as an opportunity for prospect discovery. Northern Illinois discovered 1900+ new prospects thanks to their giving day campaign.

[Read More →](#)

Giving Day Assessment Form

METRIC	TOTAL	COMMENTS
# of donors		
# of dollars raised		
# of Facebook engagers		How many people engaged on giving day-themed posts leading up to and during your giving day?
# of Facebook engagers who gave		keep nurturing people who engaged, but didn't give, with impact stories. Look at this list again in 3 months. Who has made a gift since giving day? How much additional revenue did you gain?
# of assigned prospects who gave		Ensure gift officers follow up and thank them quickly with a personalized ThankView or a Pledgemine mailer, to non-emailable folks.
# of unassigned, high net worth prospects who gave		What is the stewardship plan? Gift officers should reach out and book virtual qualification visits.
# of new assignments		Look at the above list in 3 months. Who is now assigned to a gift officer?
\$ of pipeline created		In 6 months and again in 12, look at how much major gift pipeline was the direct result of giving day (i.e. new assignments with open proposal or target ask amount)?