

TIP SHEET

3 Ways Our Hospital Foundation Uses Workflow Designer to Increase Donor Retention

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Using Workflow Designer in Blackbaud Raiser's Edge NXT®, we have boosted donor engagement and deepened relationships with donors. The three workflows we describe below have resulted in a 55% email open rate, 5% clickthrough rate, and an incredible increase in donor engagement through unprompted emails and phone calls. The key to using Workflow Designer is to use good quality data, made possible by establishing a clear gift processing structure to ensure consistency in gift entry.

1

Reduce time between gift and acknowledgement.

This workflow is the first step to retaining a new donor. By automating the process, we are able to thank donors much more quickly and remind donors why they gave.

Our first-time donor workflow is manually activated by a staff member once a week after all gifts have been processed. It uses gift date (to automatically include all gifts since the last run), contact information (email address and phone number), and salutation. The first step is an initial thank you email with a snapshot of our organization's impact that has been made possible through donor generosity. The second part of the workflow automatically creates an action for the annual giving officer to make a follow-up phone call.

2

Personalize communications.

Using highly personalized communication, we can create a deeper connection with our donors.

This workflow is automated, meaning every 24 hours the system polls for donors that have made a gift that meets the criteria we have set. In this instance, the two main criterium we specify for activation is the gift type (one-time gift) and the fund supported. The first step is an email personalized for the recipient based on the fund to which they donated.

Each fund is tied to a service line or project and we have pre-created customized emails that include a patient story from the service area. The second step in the workflow is a phone call from the development team.

3

Reconnect with past donors.

The giving anniversary workflow serves two goals: to offer another touch point with current donors and to reconnect with donors from the past as a reactivation strategy. This workflow is automated based on a donor list. For this workflow, we wanted to exclude all memorial donations, so we created an easy-to-use form linked to a static query in Blackbaud Raiser's Edge NXT which integrates into Workflow Designer.

The first step in the workflow is an email celebrating the donor's milestone anniversary. When that email is sent, an action is created for a follow-up. A gift officer is tasked with calling first year anniversaries. A development leader calls donors to acknowledge 5th anniversaries, a vice president calls to acknowledge 10th anniversaries, and the hospital CEO calls to acknowledge 20th anniversaries.

Find out how your organization can take advantage of Workflow Designer in Blackbaud Raiser's Edge NXT.

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