

Retention & Compounding Value Playbook

Seven steps from Thank You to Higher Lifetime Value — turning one gift into a lasting relationship.

07

Thank You

08

Impact

09

Monthly Giving

10

Repeat Giving

11

Fundraising

12-13

Advocacy + LTV

Thank You

Fast, personal, and proof the gift landed with someone real.

WHAT THIS STEP MEANS

The thank-you is the first moment a donor learns whether they gave to a real relationship or a transaction. Fast and personal builds trust that carries into every later stage; slow and generic quietly ends the relationship before it starts.

EXAMPLE — AUTOMATED + PERSONAL

An automated thank-you lands within 5 minutes naming the exact offer funded, followed by a personal note from a team member within 48 hours for gifts over \$250.

CHECKLIST

- ✓ Thank-you sent automatically within minutes of the gift
- ✓ Message references the specific offer or campaign funded
- ✓ Personal follow-up triggered for major or first-time gifts
- ✓ Thank-you channel matches how the gift was given
- ✓ Tone is warm and human, not transactional

Thank You

Do's, don'ts, the KPIs to track, and what to do when this step isn't working.

DO

- ✓ Personalise with name and gift amount
- ✓ Reference the specific campaign or impact
- ✓ Send via the same channel they gave through

DON'T

- ✗ Send a generic “thank you for your support”
- ✗ Delay confirmation beyond the same day
- ✗ Bury the thanks inside a receipt-only email

KPIS TO TRACK

Metric	What it tells you
Time to thank-you	How immediate the donor’s confirmation experience is
% receiving personalised thanks	Whether major/first-time gifts get human attention
Thank-you email open rate	Whether the message itself feels worth opening

TROUBLESHOOTING

Symptom	Likely Fix
Donors say they never got confirmation	Automation broken or spam-filtered — test end-to-end
Thank-you feels generic, low engagement	No personalisation or impact tie-in — add merge fields

Impact

Showing what the gift actually did — the reason to give again.

WHAT THIS STEP MEANS

A thank-you confirms the gift landed. An impact update proves it mattered. This is the difference between “we received your donation” and “here’s what your donation just did” — the second is what earns a second gift.

EXAMPLE — SPECIFIC AND VISUAL

3–7 days after the gift: “The \$45 you gave provided 10 food packs delivered to flood-affected families this week” — with a photo from the ground.

CHECKLIST

- ✓ Impact update scheduled 3–7 days after the gift
- ✓ Update ties back to the donor’s specific gift or campaign
- ✓ Includes visual proof — a real photo or short video
- ✓ Kept short and skimmable, not a long report
- ✓ Includes a soft next-step, not a hard ask

Impact

Do's, don'ts, the KPIs to track, and what to do when this step isn't working.

DO

- ✓ Show real photos, not stock imagery
- ✓ Tie impact to the donor's own gift where possible
- ✓ Keep it short and visual

DON'T

- ✗ Rely only on an annual impact report
- ✗ Wait months to show what happened
- ✗ Overload with stats instead of story

KPIs TO TRACK

Metric	What it tells you
Impact email open/click rate	Whether the update itself earns attention
Time from gift to impact update	How quickly proof follows the promise
% of donors reached within 30 days	Whether impact updates are systematic

TROUBLESHOOTING

Symptom	Likely Fix
Low open rate on impact emails	Generic subject or sent too late — personalise and tighten timing
Donors don't feel connected	Too abstract, no visual proof — add photo/video, specific numbers

Monthly Giving

Converting a single gift into a standing commitment.

WHAT THIS STEP MEANS

This is the single highest-leverage move in retention. A monthly donor is worth many times a one-time donor over their lifetime, and the ask has to be built into the journey deliberately — it rarely happens on its own.

EXAMPLE — FRAMED AS ONGOING IMPACT

After a donor's second gift: "Turn your support into lasting impact — become a \$15/month Sadaqah Jariyah partner and keep giving, effortlessly."

CHECKLIST

- ✓ Monthly ask embedded in the post-gift journey, not just on-demand
- ✓ Recurring option shown as a real, visible choice at checkout
- ✓ Monthly-specific messaging distinct from one-time appeals
- ✓ Self-serve manage/cancel option is easy to find
- ✓ Monthly donors tracked as their own CRM segment

Monthly Giving

Do's, don'ts, the KPIs to track, and what to do when this step isn't working.

DO

- ✓ Make monthly the visible default option
- ✓ Frame it around ongoing impact, not obligation
- ✓ Make managing or cancelling easy and transparent

DON'T

- ✗ Bury monthly as a tiny afterthought checkbox
- ✗ Use guilt-based framing to push the ask
- ✗ Make cancellation difficult — it erodes trust

KPIs TO TRACK

Metric	What it tells you
One-time to monthly upgrade rate	Whether the ask is working at all
Monthly donor count	The size of your recurring revenue base
Monthly churn rate	Whether recurring donors are retained after they join

TROUBLESHOOTING

Symptom	Likely Fix
Very few donors opt into monthly	Ask isn't prominent or timed well — test as default, re-ask after update
High monthly cancellation rate	No perceived ongoing value — build a monthly-specific engagement stream

Repeat Giving

A donor who returns without needing to be re-acquired.

WHAT THIS STEP MEANS

A donor giving a second, third, or fourth time — outside a formal monthly plan — is the clearest sign your retention system is working, not just your acquisition. It means they came back because of the relationship, not a new ad.

EXAMPLE — REFERENCE THEIR HISTORY

A one-time Ramadan donor is re-engaged for Qurbani: “Last Ramadan you helped 10 families eat well — here’s your next opportunity to do it again.”

CHECKLIST

- ✓ Lapsed and one-time donor segments identified and tracked
- ✓ Re-engagement campaign calendar planned in advance
- ✓ New appeals reference the donor’s past gift or campaign
- ✓ A dedicated win-back sequence exists for 6–12 month lapsed donors
- ✓ Repeat donors receive some form of recognition

Repeat Giving

Do's, don'ts, the KPIs to track, and what to do when this step isn't working.

DO

- ✓ Reference giving history in new appeals
- ✓ Space re-asks appropriately, not too often or too rare
- ✓ Build a specific win-back sequence for lapsed donors

DON'T

- ✗ Treat repeat donors identically to brand-new prospects
- ✗ Over-ask immediately after a gift
- ✗ Let lapsed donors go silent with no win-back attempt

KPIs TO TRACK

Metric	What it tells you
Repeat donor rate	The share of donors who give more than once
Average time between gifts	Whether re-engagement timing is working
Lapsed donor reactivation rate	Whether the win-back sequence actually recovers donors

TROUBLESHOOTING

Symptom	Likely Fix
Donors give once and never return	No re-engagement sequence exists — build an automated nurture calendar
Repeat-ask emails underperform	Too generic — personalise with their past-gift reference

Fundraising

The donor starts raising on the organisation's behalf.

WHAT THIS STEP MEANS

This is where a donor stops being just a source of funds and becomes a distribution channel — recruiting their own network to give. It multiplies reach at close to zero acquisition cost, but only if you make it easy to say yes to.

EXAMPLE — PRE-LOADED AND EASY

A repeat donor is invited to launch their own peer-to-peer page for the next Qurbani campaign — pre-loaded with content, images, and a starter goal.

CHECKLIST

- ✓ Clear invitation pathway from repeat donor to fundraiser
- ✓ Ready-made toolkit exists — content, images, message templates
- ✓ Recognition or leaderboard in place for top fundraisers
- ✓ Technical setup to launch a page is genuinely simple
- ✓ Momentum nudges sent during their fundraising window

Fundraising

Do's, don'ts, the KPIs to track, and what to do when this step isn't working.

DO

- ✓ Make the ask specific and easy to say yes to
- ✓ Provide a done-for-you content kit
- ✓ Recognise top fundraisers publicly

DON'T

- ✗ Assume donors will self-organise without a toolkit
- ✗ Leave fundraisers unsupported once they've signed up
- ✗ Make page setup technically difficult

KPIs TO TRACK

Metric	What it tells you
Number of donor-fundraisers recruited	How well the invitation pathway is converting
Average amount raised per fundraiser	The real value of this channel
Fundraiser activation rate	Signed up vs. actually posted or shared

TROUBLESHOOTING

Symptom	Likely Fix
Donors agree but never actually post	No toolkit or unclear next step — send ready-made content day one
Few donors say yes to the ask	Feels like a big commitment — lower the bar first

Advocacy

Referrals and reputation — growth that costs nothing to acquire.

WHAT THIS STEP MEANS

Advocacy is word-of-mouth made deliberate. A donor who trusts you enough to vouch for you publicly is more persuasive than any ad — but that referral rarely happens unless you actually ask for it.

EXAMPLE — DIRECT AND FRICTIONLESS

A satisfied monthly donor is asked directly: “Do you know two people who’d want to join you in this?” — with a one-tap share link attached.

CHECKLIST

- ✓ Explicit referral ask built into the donor journey
- ✓ Easy shareable assets provided — link, image, message
- ✓ Testimonials actively collected from happy donors
- ✓ Advocacy tracked separately from direct giving in the CRM

Advocacy

Do's, don'ts, KPIs and troubleshooting — plus the compounding outcome of it all.

DO

- ✓ Ask directly for referrals — don't wait
- ✓ Make sharing frictionless, one tap

DON'T

- ✗ Assume happy donors will refer unprompted
- ✗ Ignore testimonials once you've collected them

Metric	What it tells you
Referral-sourced donor count	How much growth advocacy is actually driving
Advocate-to-donor ratio	What share of your base is actively promoting you

Symptom	Likely Fix
Happy donors rarely refer	No explicit ask exists — build a direct referral ask
Referred donors convert poorly	Generic landing experience — acknowledge the referrer

Higher Lifetime Value

THE COMPOUNDING RESULT

Donor LTV $\approx$ (Average Gift $\times$ Giving Frequency $\times$ Donor Lifespan) + Fundraising & Advocacy Value