



THE FIRST 90 DAYS DONOR JOURNEY PLAYBOOK

A practical roadmap for turning a first gift into the beginning of a real relationship.

THANK → CONNECT → SHOW IMPACT → ENGAGE → DEEPEN

The first gift is not the finish line. It is the moment the relationship begins.

Grow Donors. Grow Giving. Grow Impact.

The first gift is a beginning, not a victory lap.

A donor just raised their hand and said, I believe enough in this mission to invest in it. What happens next determines whether that moment becomes a transaction - or the beginning of a relationship.

Too many organizations immediately move a new donor into the next campaign. The receipt goes out. Maybe a thank-you email follows. Then the donor disappears into the database until it is time to ask again.

Donor Success takes a different approach. The first 90 days should intentionally answer five questions for the donor:

1. Did you notice me?

A fast, personal thank-you shows the gift mattered.

2. Do I understand the mission?

Connection helps the donor see the people and purpose behind the organization.

3. Did my gift matter?

Impact closes the loop between generosity and outcome.

4. Is there a place for me here?

Engagement creates belonging beyond the transaction.

5. Do I want to go deeper?

A strong relationship naturally creates the next meaningful step.

Retention starts before the second gift. It starts with what you do after the first one.

The Donor Success First 90 Days Journey

WHEN	STAGE	OBJECTIVE
DAY 0-2	THANK	Acknowledge quickly and make the donor feel seen.
DAY 3-14	CONNECT	Introduce the mission, people, and story behind the work.
DAY 15-30	SHOW IMPACT	Demonstrate what generosity makes possible.
DAY 31-60	ENGAGE	Invite participation, conversation, and deeper connection.
DAY 61-90	DEEPEN	Learn more, personalize the relationship, and identify the next best step.

This is not a rigid automation sequence. It is a relationship framework. Adjust timing and channels based on the donor, gift, mission, and context.

THANK | Day 0-2

Make the donor feel seen immediately.

Speed matters, but sincerity matters more. Your first response should confirm the gift and communicate genuine gratitude - without turning the thank-you into another ask.

What to do

Immediately

Send gift confirmation and a warm thank-you message.

Within 24 hours

For priority donors or meaningful first gifts, add a personal email, text, or call.

Within 48 hours

Record the interaction, relationship owner, source, interests, and anything learned.

What to avoid

- Do not bury gratitude inside a tax receipt.
- Do not immediately ask for another gift.
- Do not make every donor receive the exact same experience.

The donor should leave this stage thinking: They noticed. My gift mattered.

CONNECT | Day 3-14

Help the donor understand who they just joined.

The donor gave because something resonated. Now help them connect that initial motivation to the broader mission, people, and community.

What to do

Tell one strong story

Share a human story that illustrates the mission without overwhelming them with information.

Introduce the organization

A short founder, CEO, program leader, or beneficiary message can create connection.

Learn where possible

Use replies, calls, forms, event context, or referral information to understand why they gave.

What to avoid

- Do not send a five-page organizational history.
- Do not make connection another campaign blast.
- Do not assume you know why they gave.

The donor should leave this stage thinking: I understand this mission, and I feel connected to it.

SHOW IMPACT | Day 15-30

Close the loop between the gift and the outcome.

Donors should not have to guess whether their generosity mattered. Show them. Specific, credible impact builds confidence and trust.

What to do

Show what changed

Use a story, metric, photo, short video, or program update.

Connect giving to outcomes

Explain how donor support enables the work without pretending one gift funded an entire outcome.

Say thank you again

Gratitude is not a one-time event.

What to avoid

- Do not wait until the annual report.
- Do not make impact only about organizational activity.
- Do not overwhelm donors with vanity metrics.

The donor should leave this stage thinking: I can see what my generosity helps make possible.

ENGAGE | Day 31-60

Create belonging beyond the donation.

The strongest donor relationships are not built only through giving. Invite donors to experience, learn, participate, and connect in ways that fit the mission.

What to do

Offer a next experience

Tour, volunteer opportunity, event, briefing, story, community gathering, or program update.

Invite conversation

Ask a thoughtful question instead of always sending information.

Segment the invitation

Match engagement to donor interest, location, capacity, giving source, or behavior.

What to avoid

- Do not make every engagement opportunity another fundraiser.
- Do not assume everyone wants to volunteer.
- Do not confuse more communication with better communication.

The donor should leave this stage thinking: There is a place for me in this mission.

DEEPEN | Day 61-90

Turn early engagement into an intentional relationship.

By this point, you should know more than the donor's name and gift amount. Use what you have learned to determine the next best action.

What to do

Review relationship health

Look at giving, engagement, responsiveness, interactions, and known interests.

Choose the next best action

Personal call, impact update, event invite, recurring gift conversation, leadership introduction, or simply more stewardship.

Assign ownership

Higher-potential relationships should have a clear human owner.

Document what you learned

Good cultivation gets smarter with every interaction.

What to avoid

- Do not force the second ask because Day 90 arrived.
- Do not treat every donor as a major gift prospect.
- Do not let a strong first 90 days end in silence.

The donor should leave this stage thinking: They know me - and I want to stay connected.

Not every donor needs the same journey.

Personalization does not mean every donor gets a handcrafted 90-day plan. It means the experience changes where the relationship warrants it.

HIGH-TOUCH Major gifts, high-capacity prospects, significant first gifts, strategic relationships. Add personal calls, leadership touches, tailored impact, and assigned ownership.	GUIDED Mid-level donors, recurring donors, event-connected donors, volunteers, referrals. Blend automation with personal touches triggered by behavior.
SCALED Broad-base and lower-dollar first-time donors. Use excellent automated stewardship, segmentation, relevant content, and behavioral triggers.	UPGRADE SIGNALS Watch for repeat engagement, event attendance, email response, volunteering, referrals, recurring-gift interest, increased giving, or strong relationship health.

Scale the delivery, not the feeling. Every donor should still feel thanked, informed, and connected.

90-Day Touchpoint Planner

Use this worksheet to translate the framework into your organization's actual donor experience.

WINDOW	OBJECTIVE	TOUCHPOINT	CHANNEL	OWNER
Day 0-2	Thank			
Day 3-14	Connect			
Day 15-30	Show Impact			
Day 31-60	Engage			
Day 61-90	Deepen			
Trigger	High engagement			
Trigger	Risk / no engagement			

WHAT TO TRACK

Measure the relationship, not just the revenue.

The first 90 days should produce signals that tell you whether the relationship is getting stronger.

Acknowledgment speed How quickly did the donor receive a meaningful thank-you?	Engagement rate Did they open, click, reply, attend, volunteer, visit, or otherwise engage?
Second-touch completion Did your organization intentionally reach the donor again after the receipt?	Relationship ownership Are priority donors assigned to a real person?
Second-gift rate What percentage of first-time donors make another gift?	Time to second gift How long does it take for the next gift to occur?
Recurring conversion How many first-time donors become recurring supporters?	Donor Success Score Is relationship health strengthening, flat, or declining?

The second gift is an outcome. The relationship signals that come before it tell you whether you're earning it.

Build Your First 90-Day Journey in 30 Days

WEEK 1	MAP	Document what currently happens after a first gift. Identify gaps, delays, duplicate communication, and places donors disappear.
WEEK 2	DESIGN	Define the five stages, messages, channels, owners, and segmentation rules for your organization.
WEEK 3	BUILD	Create emails, call scripts, impact content, tasks, automations, and staff workflows.
WEEK 4	LAUNCH + MEASURE	Turn the journey on, monitor completion and engagement, collect feedback, and improve the experience.

Do not wait until every automation is perfect. A sincere personal thank-you and a clear stewardship rhythm can start changing donor experience immediately.

PUT IT INTO ACTION

The first 90 days can change the lifetime of a donor relationship.

A donor's first gift gives your organization an opportunity. What you do next determines whether that opportunity grows.

Thank them. Connect them to the mission. Show them what their generosity makes possible. Give them a meaningful way to engage. Then use what you have learned to deepen the relationship.

Don't rush to the next ask. Earn the next conversation.

READY TO BUILD A DONOR JOURNEY THAT CULTIVATES RELATIONSHIPS AT SCALE?

Donor Success combines intelligent donor technology with practical advisory support to help nonprofits understand relationship health, recognize risk and opportunity, and know what to do next.

Visit donorsuccess.com to learn more or book a Donor Growth Assessment.

Grow Donors. Grow Giving. Grow Impact.