



Double *the* Donation

Improving the Donor Journey with Matching Gifts

A strategic guide for creating a positive experience for matching gift donors



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Introduction



Introduction

Employer matching gift programs present fundraisers with an exceptional opportunity to gain the value of two donations for the cost of securing just one. Across many different industries, nonprofits and educational institutions have the power to significantly boost funds and spark donor engagement through employer matching gifts - yet most fundraisers fall well-below the number of matches that they qualify for. How is it that corporations offer financial support to fundraisers, yet the majority of organizations are not accepting these funds?

Well, to start, donors face seemingly insurmountable barriers, which can substantially demotivate them. Commonly, donors encounter a general lack of knowledge. This often includes determining where they can find their employers' program parameters and understanding if they even qualify for an employer matching gift. These obstacles become considerably more challenging if your staff doesn't have the necessary matching gift knowledge to fill in the gaps for donors (or simply doesn't make a conscious effort in promoting the opportunity). Overall, the answer is simple: fundraising organizations often neglect to optimize the entire donor experience.

Often, nonprofits focus only on the processing side of the donor experience, not the donor journey itself. However, the journey plays a major role in whether or not you maximize generosity and secure a matching gift. When discussing the donor perspective, it's important to remember that donors may not be motivated to submit a matching gift request if they have to blindly navigate the match request process with minimal guidance.

In order to ignite motivation in match-eligible donors, you need to focus on the your donors' experience and perspective.

This begs the question: what does the donor journey look like as it relates to employer matching gifts? Do donors have everything they need to secure a doubled gift to your organization? Or is there supplemental material that would help ensure donors maximize support to your mission?

In this guide, we'll take a look at how exactly you can improve the donor journey with matching gifts. Prioritizing their experience is the only surefire way to secure the maximum amount of matches possible, after all. By making sure your donors feel valued, they'll be much more motivated to complete the match process. From the initial donation to follow-up, your team has the opportunity to streamline the donor journey with matching gifts. Doing so is crucial to fulfilling your matching gift potential. Together, we'll create a bulletproof plan for securing your portion of the billions of dollars in matching gift funds that go unclaimed each year.

Let's get started!

The Matching Gift Lifecycle



A donor makes a gift to an organization



The fundraising organization conducts outreach with matching gift solicitation



The donor submits their matching gift request to their employer



The employer verifies the gift, and the organization team follows up for engagement and relationship cultivation

Step 1: Donor Makes a Gift



Step 1: A Donor Makes a Gift.

The moment a prospect decides to make a philanthropic impact on your cause is the moment the donor journey begins. By incorporating matching gifts from the point of activation, you can create a high value, high impact experience through the rest of the process.

To learn how to effectively build up (and maintain) donors' momentum, let's dive into the immediate steps you should take to get started.

Consider the Online and Offline Donation Processes

Organizations of all sizes have multiple revenue streams. Each comes with a unique experience, but overall, each donation method can be divided into two main categories: online and offline.

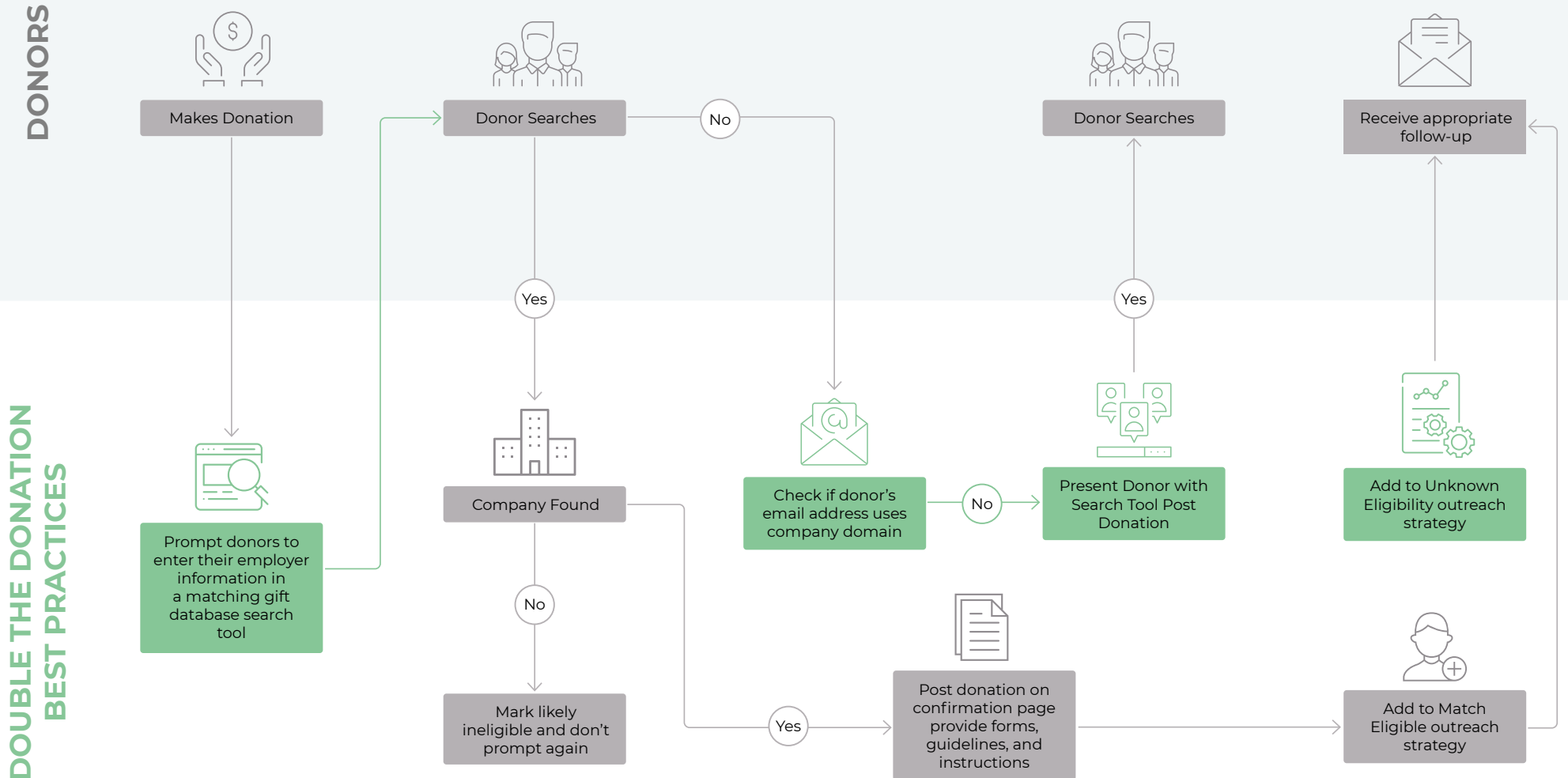
Both online and offline gifts can qualify for a match, but the way that your organization communicates to donors throughout the donation process may vary.

For each donation avenue, you'll need to consider how you can provide the correct matching gift next steps to the correct donors at the time this instruction is most relevant to them.

With Double the Donation's matching gift software, that's exactly what you can do. Let's take a look at the matching gift process flow for an online match-eligible donor compared to that of an offline match-eligible donor using matching gift automation. Seeing the Double the Donation process will provide you with industry best practices for improving the donor journey, and we'll provide some key takeaways below.

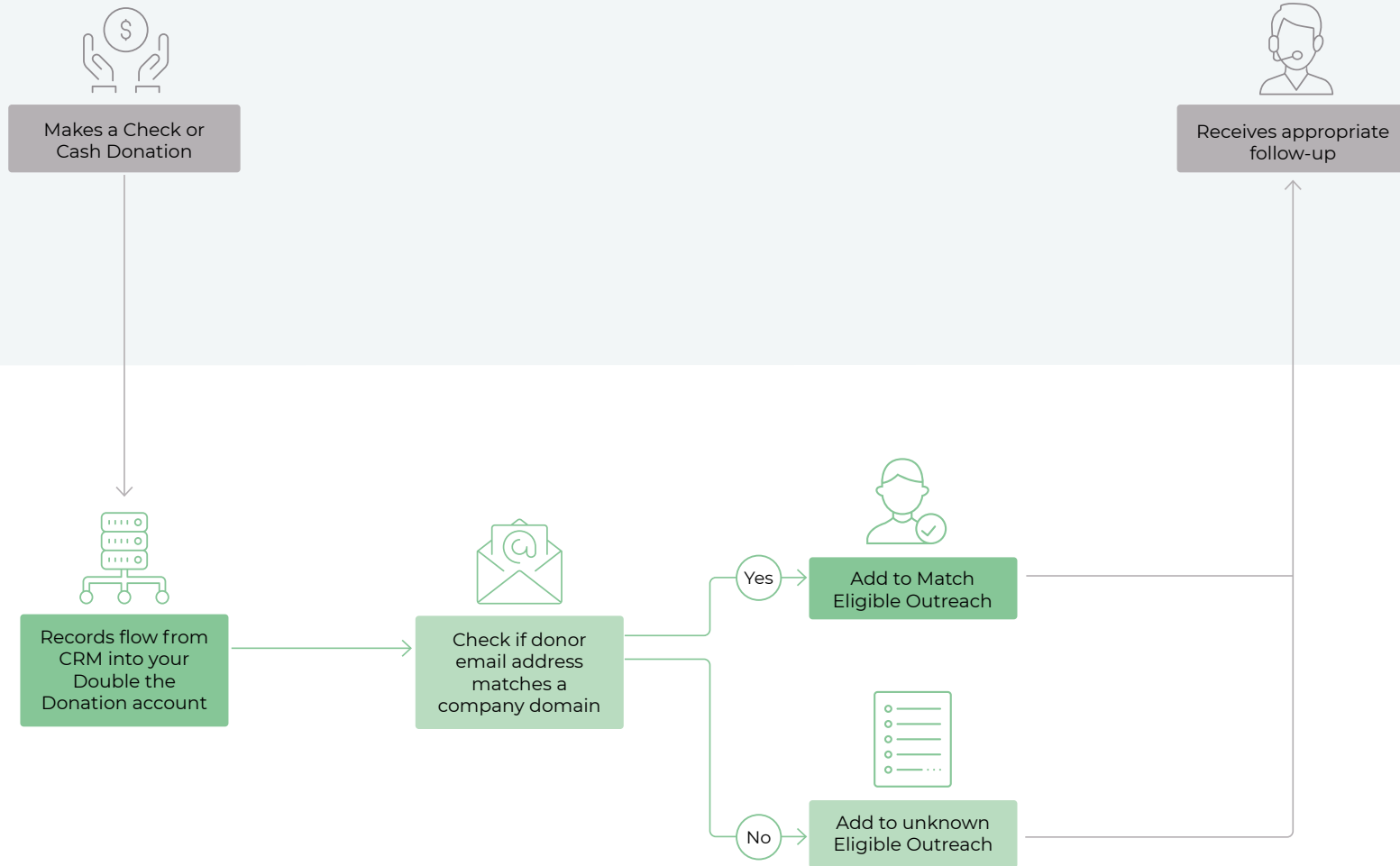
PROCESS FLOW: ONLINE DONOR EXPERIENCE

(Offline Experience is Similar)



PROCESS FLOW: OFFLINE DONOR EXPERIENCE

DONORS



DOUBLE THE DONATION
BEST PRACTICES

These processes are somewhat complex, so let's take a look at a few crucial takeaways:

- With Double the Donation's software, you can identify match-eligible donors during the donation process
- Offline donations can flow directly from your CRM to Double the Donation, which allows you to identify and pursue match opportunities even if gifts weren't made online.
- In both processes, Double the Donation's tools streamline the research process and provide you with unique outreach strategies.

While most online donations occur through your digital donation form, there are several avenues which offline donors use to contribute. Because of this, you should be prepared with an actionable plan for efficiently incorporating matching gifts in your existing offline processes. For instance, your team may want to:

- Create inserts for your direct mail campaigns.
- Highlight matching gifts in major and planned giving conversations

While the bulk of your donations may come from online avenues, offline support is just as crucial to your organization's success. By doing everything you can to increase awareness among all donors, you'll be much more likely to secure the support you need.

Determine Match Eligibility


Considering that **84% of donors** say they're more likely to donate if a match is offered, it's a good idea to ensure your donors know about matching gift programs before they submit their initial donation. If you've invested in a matching gift automation tool like Double the Donation, your donation process presents a great opportunity to utilize your employer search tool to determine eligibility at the point of

activation. After all, making a gift is when donor engagement is at its peak, so you'll want to do everything you can to proactively market matching gifts at this time.

As soon as your donor submits a donation, they should be greeted with more helpful resources to determine their eligibility. This could be anything from a helpful overview of matching gift programs to step-by-step instructions. Simply updating the confirmation screen to reference matching gifts can drive results for your team.

Take a look at this example from the Cat Rescue Club:

About 360MatchPro | Dedicated Matching Gift Page

 **CAT RESCUE CLUB**

DONATE TODAY

THANK YOU FOR DONATING!


(You may be able to make your donation go twice as far with matching gift)


Thank you for your donation

See if your employer will match your donation!

LET'S CHECK

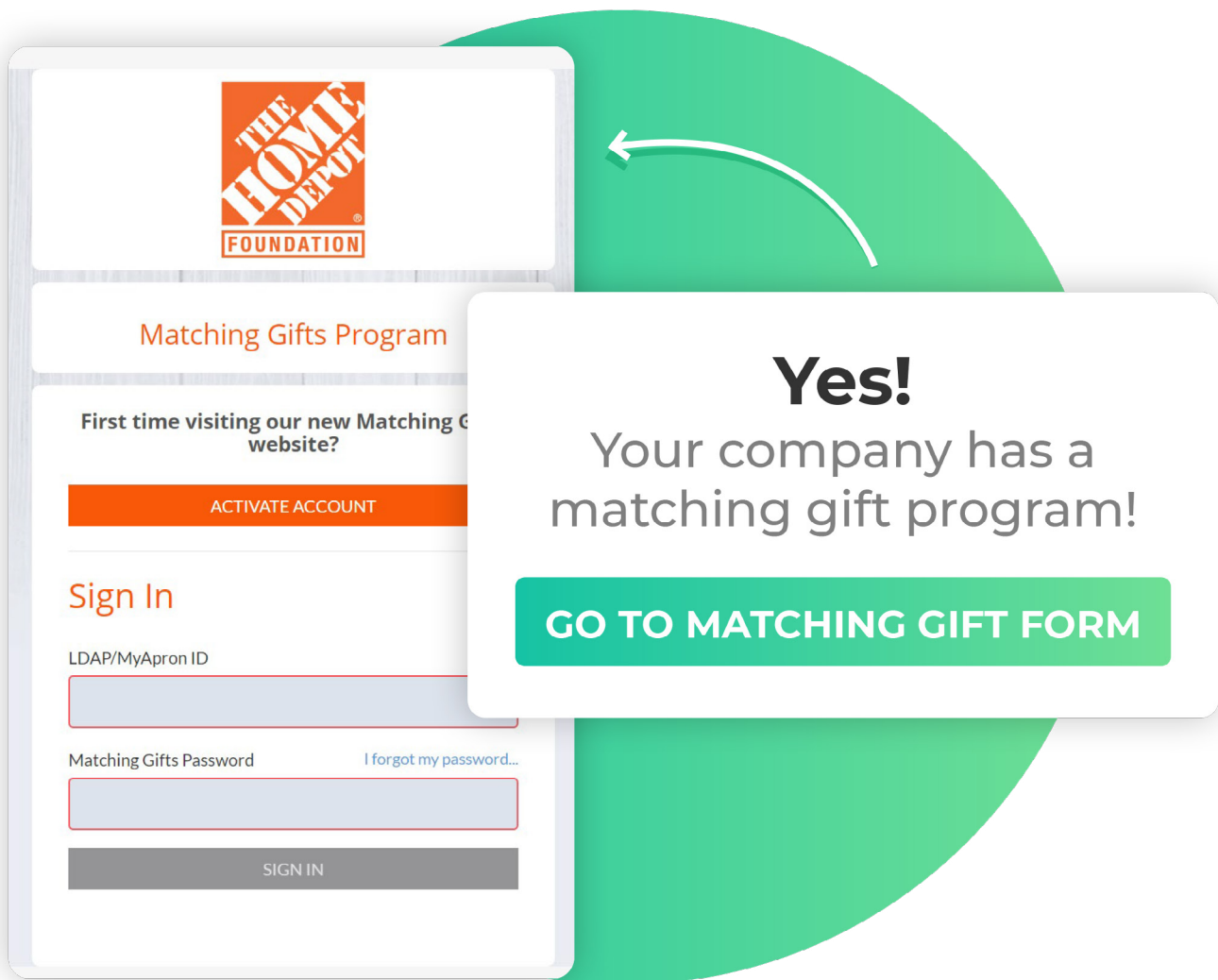
All information provided by

 **Double the Donation**
matching gifts made easy

 Payment Complete: Thank you for your donation.

Without a dedicated tool directly embedded into your donation form, donors will be forced to research their employers' match programs on their own. Ultimately, this will only send them away from your site which interrupts the donation process. This can be detrimental, because prospects are much more likely to get distracted and forget about completing their donation. Plus, locating guidelines can be a hassle for donors, leaving them frustrated if they're not given some sort of guidance.


To help, add a streamlined search tool on the donation form and then also present all the forms, guidelines, and instructions post-donation. By giving them exactly what they need to research their eligibility, they'll be much more likely to do so.



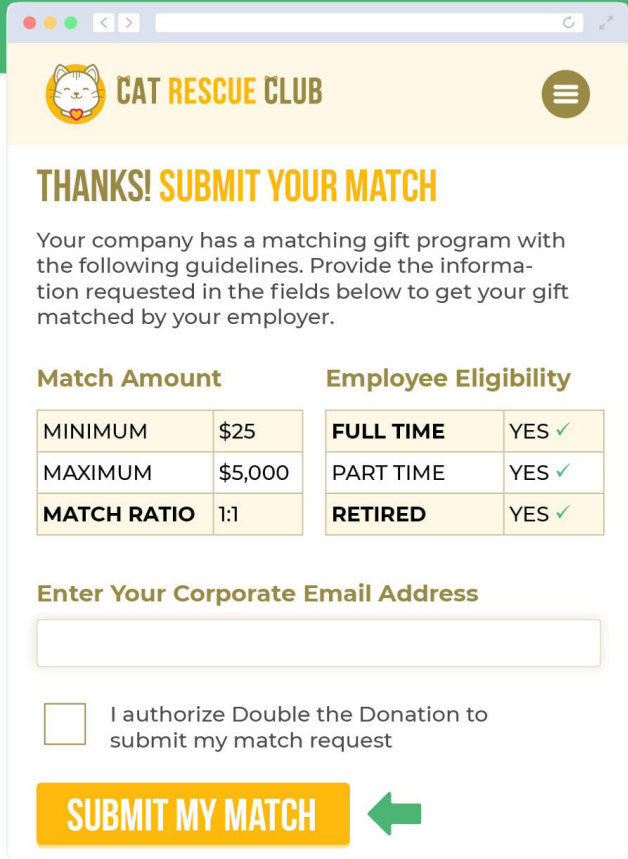
It's important to remember that every company offers different program requirements and submission processes - there's no one size fits all when it comes to matching gift programs. This is why it's so important to screen your donors' employer information; it can help you (or your matching gift automation tool) provide tailored next steps that help your donor base kick off the matching gift submission process with ease.

With Double the Donation's auto-submission feature, your donors may even be able to complete the entire matching gift process directly on the confirmation page. For select companies, donors can opt in for Double the Donation to actually submit matching gifts on their behalf. This means that your supporters can just check a box and double their gift - no redirects or complicated submission steps needed!

01 | A match-eligible donor makes a gift to a nonprofit directly through their website.



02 | The donor submits their gift and auto-submits their matching gift directly from the thank-you page!



With 360MatchPro's auto-submission feature, your donors will be able to double their donations with just a couple of clicks directly on your donation thank-you screen.

Double the Donation also provides fundraisers with the ability to screen email domains of your donors. For example, let's say you have a donor who works for The Home Depot, and they make a gift using their company email address domain. Double the Donation can then present their company-specific matching gift next steps on the donation confirmation page to help that individual start the matching process quickly and seamlessly.

Using this powerful technology, thousands of nonprofits and educational institutions have significantly grown their matching gift fundraising and donor engagement.

Step 2: Matching Gift Communication Kicks Off



Matching Gift Communication Kicks Off:

Matching gift emails play a pivotal role in enhancing the donor journey by providing vital information to donors:

1. Matching gift emails educate donors about the potential impact of their match program, highlighting the multiplier effect of their contributions.
2. These messages keep donors engaged and informed, fostering a sense of transparency and trust, and connection throughout the giving process.
3. Matching gift communication serves as gentle reminders, encouraging donors to complete the matching gift process and maximize their support, thus reinforcing their commitment to the cause and elevating their overall donor experience.

Follow-Up Emails

It is an industry best practice to ensure that every single one of your donors receive donation follow up emails encouraging them to research their eligibility. This is important because:

- Many donors qualify for matching gifts but don't know it.
- Some companies match the gifts of spouses, retirees, or part-time employees - so sometimes donors will incorrectly think they don't qualify for a match even if they do.
- Company programs and donor employment changes regularly. Sending matching gift emails to all donors makes it more likely you will uncover unknown matching opportunities.

Set up a consistent follow-up schedule to maximize your matching gift success. Double the Donation offers many different customizable email automation options

to ensure your donors understand their matching gift next steps. Let's take a look at Double the Donation's most popular automated follow-up emails:

- a. Donors whose eligibility cannot be determined are sent an email prompting them to search their employer using the Double the Donation database search tool. Double the Donation automated emails have a tracking code that captures the search results and updates your database. This helps you to uncover more matching gift opportunities and drive them to completion.
- b. Donors who are identified as match-eligible via the search tool or via email screening receive call to action emails. These messages provide the donor with a direct link to their employer matching gift request form. If these donors qualify for auto-submission, they'll see an option to opt in for Double the Donation to submit their request. Regardless, these messages provide tailored follow-ups to your match-eligible donors.

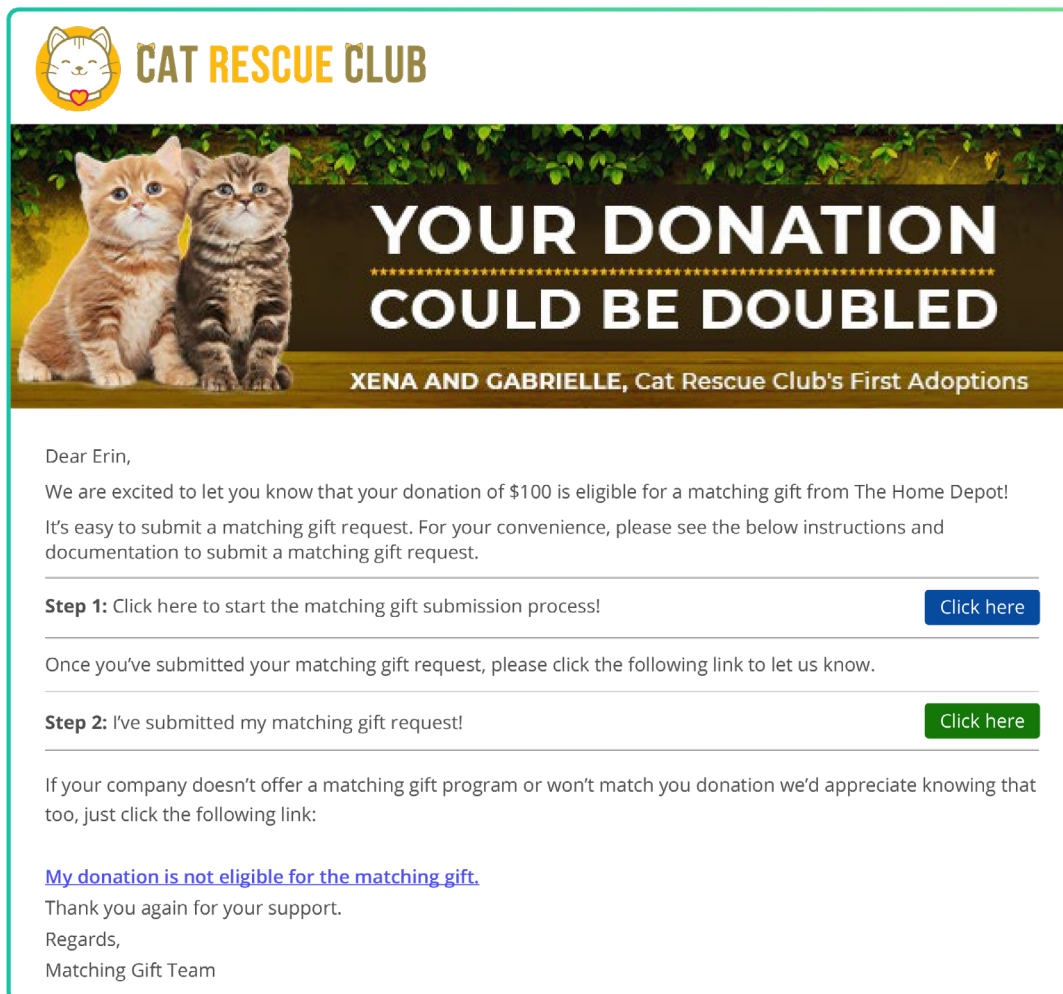


By implementing some sort of follow-up schedule like the one indicated above, your team will help to ensure no matching revenue falls through the cracks. While automation is the easiest way to configure these streams, you may not have access to matching gift software. If that's the case, determine which segment of your donor base would best benefit from follow-up messaging based on existing data and available team time.

When crafting your follow-up emails, we recommend clearly highlighting the impact of a donor's doubled gift.

Don't forget: donors are proven to respond well to matching gift messaging. Don't be afraid to send matching gift follow-up emails to continually encourage your donors to submit their matching gift request and grow support for your mission.

Check out an effective matching gift email from the Cat Rescue Club:



Phone Calls

Phone calls are another great way to remind your donors of their match-eligibility and encourage them to double their donation. With this type of outreach, you should be more selective. It takes only a few minutes to type up an email (and no time at all with an automated reminder system), but a phone call will take up several minutes of your team's time—several minutes that could be better spent cultivating relationships with high-value matching gift donors.

To narrow down your list, only call those who are strong prospects. Doing this enables your team to:

- Communicate on a deeper level and develop relationships with high-value donors.
- Provide assistance to those who may be confused about the matching gift process.
- Conduct quick follow-up with donors who are much more likely to submit matches.

As you get started, you may wonder how exactly to determine which donors your team should reach out to and which should only receive automated communications. To aid in the selection process, create criteria such as the following:

- **Minimum donation amount**

What do you consider to be the minimum valuable donation amount to follow up on? Many organizations set a minimum donation of \$50 before they reach out, but this varies widely from organization to organization. Either choose to set this minimum based on the donation amount or the match amount since different employers offer different match ratios.

- **Donor Eligibility**

Are you able to determine if their employer offers a matching gift program? Further, are they eligible for their employer's program? If not, it may not be worth your organization's time to chase the match.

- **Nonprofit Eligibility**

Is your nonprofit eligible for the employer's program? If not, take note for future reference and spend time cultivating other strong match-eligible prospects. This way, you don't waste time reaching out to donors whose employers won't match donations made to your organization.

So that you have an actionable example to follow, let's look into some sample data from the Leukemia & Lymphoma Society. They set specific requirements for reaching out via phone call, which included a minimum donation amount and the organization's eligibility for employers' matching gift programs. After applying a \$250 minimum threshold to all donations, their list of 2,300 donors was brought down to 240. After applying some additional criteria concerning their organization's eligibility, the number of potential match-eligible donations was brought down to 217. In other words, they reached out to a fraction of the original donors by locating their top available matches and ensuring they didn't spend time chasing nonexistent opportunities.

Once you've put criteria like that in place, your team will need to prepare for the outbound calls. A script is a fantastic way to accomplish this! If you're already doing follow-up outreach to select donors, it could be as easy as asking them if they have any questions about the matching gift process. A simple question may be all you need to initiate a conversation with some donors!

While all matching gift donors are important, it can be worthwhile going the extra mile to express appreciation and encourage matches to your major givers.

Step 3: The Match is Verified



Step 3: The Match is Verified.

While the most challenging part of securing matching gift funds is encouraging donors to complete the process, don't forget about your nonprofit's role. After a donor completes a matching gift request, a substantial portion of the responsibility is shifted over to your team.

It's up to you to drive the verification process to completion, so your donors' hard work to submit their matches doesn't go to waste.

This may seem like a simple step. After all, all your team needs to do is tell the company, "Yes, your employee did in fact make a donation to our organization, and we meet your company's eligibility requirements." However, sometimes the verification process has nuances that are important to keep in mind.

If you don't have set processes in place around matching gift verification, it might be time to consider creating some. Streamlining your verification process means you'll be able to verify gifts more quickly, which creates a better overall donor experience.

A great place to start is by familiarizing yourself with the corporate giving platforms you may encounter during verification. Many companies outsource their matching gift programs to these third-party software providers, and these companies will help your donors to facilitate their matches.

Since you'll be dealing directly with these vendors, it's important to understand the requirements for each. Let's take a closer look at 3 of the most widely-used platforms:

	Benevity	YourCause	CyberGrants
Verification Required?	Rarely	Typically	Typically
Verification Deadline	N/A	N/A	Typically 30-60 Days
Payment Options	ACH or Check	ACH or Check	ACH or Check
Volunteer Grants & Employee Giving	Centralized	Program-Specific	Program-Specific

While this part of the process depends substantially on your team, there is a way you can improve the donor's perspective. You should give them every piece of information and form they need, whether that's through helpful resources or through one-on-one conversations.

Make sure your team is up-to-speed on the guidelines for each major vendor. Your dedicated matching gift page can be as much of a resource for staff as it is for donors—especially if you have a search tool at your disposal. For one, this ensures you won't overlook a single matching gift dollar. It also enables you to quickly answer donors' questions about these systems as they arise. When your team can help them navigate any obstacles they've encountered, they won't feel as though they've been left to fend for themselves.

Whatever you do, do not forget to verify the gift. This is the final step before receiving a check, and the last thing you want to do is slip up and miss out on the match! Fortunately, more and more companies are moving to matching gift processes that don't require nonprofit verification!

Best Practice: Present matching gift information after a donation is made on the donation confirmation screen and via separate matching gift email.

Verification with Double the Donation's Auto-Submission

Don't forget: Double the Donation's matching gift tool, offers a unique auto-submission feature. This allows donors to immediately submit their matching gift request after the donation process has been completed.

With matching gift auto-submission, Double the Donation can provide donation verification details to select corporate vendor platforms directly - meaning, this feature not only streamlines the donor submission process, but also the nonprofit verification process.

If you're using Double the Donation, make sure that your organization enables the auto-submission feature to save time while increasing revenue.



Step 4: Define the Post Matching Gift Process



Step 4: Define the Post Matching Gift Process

There's nothing better than receiving a matched gift and knowing you earned twice the funding for the cost of securing one single gift - but it's important to note that the process doesn't end here. Part of the matching gift life cycle involves an ongoing communication process.

You've done all you can to streamline the process for matching gift donors, and they'll appreciate it. However, you need to stay front of mind if you plan on continuing to secure these funds in the future. Cultivation is the final piece to the puzzle, so don't leave it up to chance. Instead, define the post matching gift process for your organization.

While the key is revenue growth, defining your post matching gift process can take your strategies to the next level. It's important to note that this is entirely optional but can yield significant benefits over time.

Whether post-matching-gift outreach is done upon verification or after the check is received differs between organizations and depends on your unique needs. Define the optimal time for your organization, so you'll be consistent and not let anything fall through the cracks. Let's take a look at a few common elements of any effective post matching gift strategy.

Thank Your Donors.

This should go without saying, but it bears repeating: always thank your donors—especially your matching gift donors!

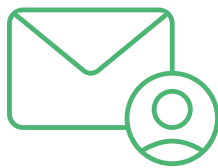
Today's technology enables automated communication, meaning your team doesn't have to do anything more than customize a template to express gratitude for a match. For your high-value matching gift donors, you'll want to manually reach out to say thank you though. After all, nothing replaces the authenticity of personalized outreach.

Every dollar counts, but manual outreach for all matching gift donors simply isn't feasible for most organizations. What constitutes a high-value matching gift donor varies from organization to organization, so you'll first need to determine the threshold for your nonprofit, whether it's \$50, \$500, or \$5,000. This will make it much easier to organize communications and determine which matching gift donors will receive manual outreach and which will receive automated emails.

Outreach for high-level donors could come from the Executive Director (ED), a Director of Development or relevant program the donor contributed to, a Board member, or other senior leadership staff. The acknowledgments they could use to effectively convey gratitude may include:



**Handwritten
Letters**



**Personalized
Emails**



Phone Calls



Postcards

Depending on your team's processes and availability, you could all go out or select a combination of a couple acknowledgement techniques.

In any case, remember that people want to be thanked in the way they gave. Whether it's through direct mail or online, make sure to proactively contact them the same way they donated. They'll recognize and appreciate the fact that you're taking their preferences into account.

Send Well-Timed Solicitation.

Sending ongoing matching gift solicitation during special dates often produces significant results.

Well-timed communication can serve as a simple yet powerful reminder for many donors to encourage engagement with your organization.

To help determine the best dates for your organization to send messaging, keep in mind that matching gift deadlines usually fall under one of two types:

1. Within a set number of months — A company may choose to stipulate how many months it will fulfill a match up to. For instance, this could be 3, 6, or even 12 months following the initial donation.
2. By the end of the calendar year — Many employees must submit their match request within the same calendar year that the donation is made. Some companies may offer an extended grace period of one or two months.

If you're hoping to catch additional donations and matching gift requests from your donors, it's a good idea to consider year-end solicitation. Not only will this capture your audience during the season of generosity, but it can also allow you to convey a sense of urgency, as you'll likely be able to mention the end-of-year matching deadlines to your donors.

This is an optimal time to connect with donors, and Double the Donation makes it easy to send simple (yet effective) reminders with the end-of-year email stream. When you enable the end-of-year email stream, you can configure messaging to recent donors to encourage them to continue matching gift generosity during the year end season. Even if you've received a match from these donors in the past, it's important to continue making it simple for them to kick off their matching gift process.

Best of all, this technology honors the email blacklist, sending limits, and company exclusions so you can configure messaging without worrying about sending unwanted messages.

All you need to do is enable it and select a date for the emails to be triggered. This eliminates the need for manual outreach and delivers value directly to match-eligible donors.

End-of-Year Email Template

BETA



Disabled

Send this email on December

1



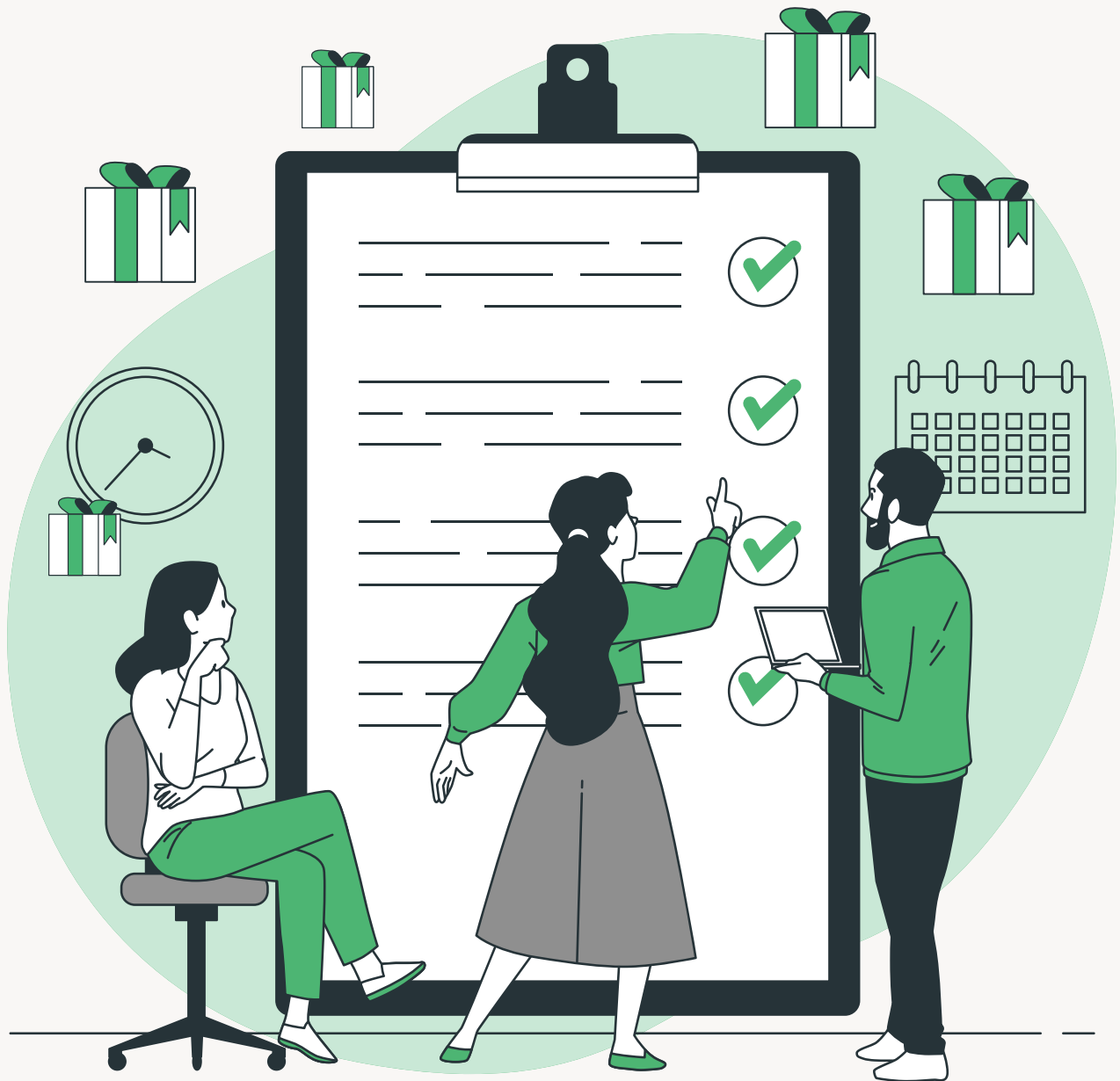
Currently, 0 donations are eligible for an end of year email.

Bonus Idea: To hone in on your high-value donors, ask your matching gift coordinator to focus on your top 25 matching gift opportunities. Then, conduct targeted outbound calling in order to launch you toward your year-end goals. Remember, a simple reminder can go a long way in facilitating ongoing engagement.

Time permitted, you can expand your organization-wide solicitation beyond year-end. Consider other events, drives, or funds your organization has throughout the year. Then, try adding matching gift language prior to, during, or after these events as well.

When experimenting, if you see a lift using one particular tactic, this might incentivize your team to put out solicitations during other key times.

Bonus: Assessing your Organization's Donor Experience



Bonus:

Assessing your Organization's Donor Experience

So you've outlined your entire donor journey. You're pretty confident that the experience is positive and effectively encourages matching gift donors to submit matches again, but how do you know for sure?

Determining where there's dropoff in the process can point to areas of improvement in the donor journey. Let's take a look at a few actionable steps for doing so, so your team can easily refine the donor journey with matching gifts.

Designate a Matching Gift Owner at Your Organization.



If you haven't already designated a staff member who owns matching gifts, consider assigning one to take care of all your organization's matching gift needs.

This individual should be in charge of the entire process, including all outreach. Task them with conducting appropriate follow up and gathering feedback. Once they've gathered this input, don't just let that information sit there! Do something with it!

Having someone responsible for this enables you to act on the feedback your donors provide, and implementing the suggested changes conveys to matching gift donors that your team values them.

Best Practice: Not only should this individual be fully educated on the matching gift process, but they should also understand how to navigate your matching gift database and automation tools.

Assess Your Website's Matching Gift Visibility.

Online fundraising is ever-growing and is increasingly important for fundraisers across the board. In other words, your website serves as a fantastic resource for promoting matching gifts!

Attempt to take the view of the average user who may be curious about matching gifts. Then, walk through your website. Specifically, you'll want to assess the degree of matching gift visibility by asking yourself the following questions:

- Do you have a dedicated matching gift page?
- Is your matching gift page visible in your navigation?
- Is your matching gift page easily found via the search feature?
- Do you have information about matching gifts on your Ways to Give page?
- Do you have a matching gift search tool embedded above the fold on your matching gift page?
- Are you giving donors step-by-step instructions for completing their match requests?

By increasing visibility across your website, you'll increase awareness as a whole and improve the likelihood that match-eligible donors will complete their matches.

Best Practice: If you're unsure of where to start in this process, go through the above steps for other organizations' websites. Compare their matching gift visibility with yours, so you can refine your strategy and improve the donor journey all-around.

Assess Your Online and Offline Donation Process.

To take your assessment one step further, walk through your online donation process step by step. You should be able to answer the following questions:

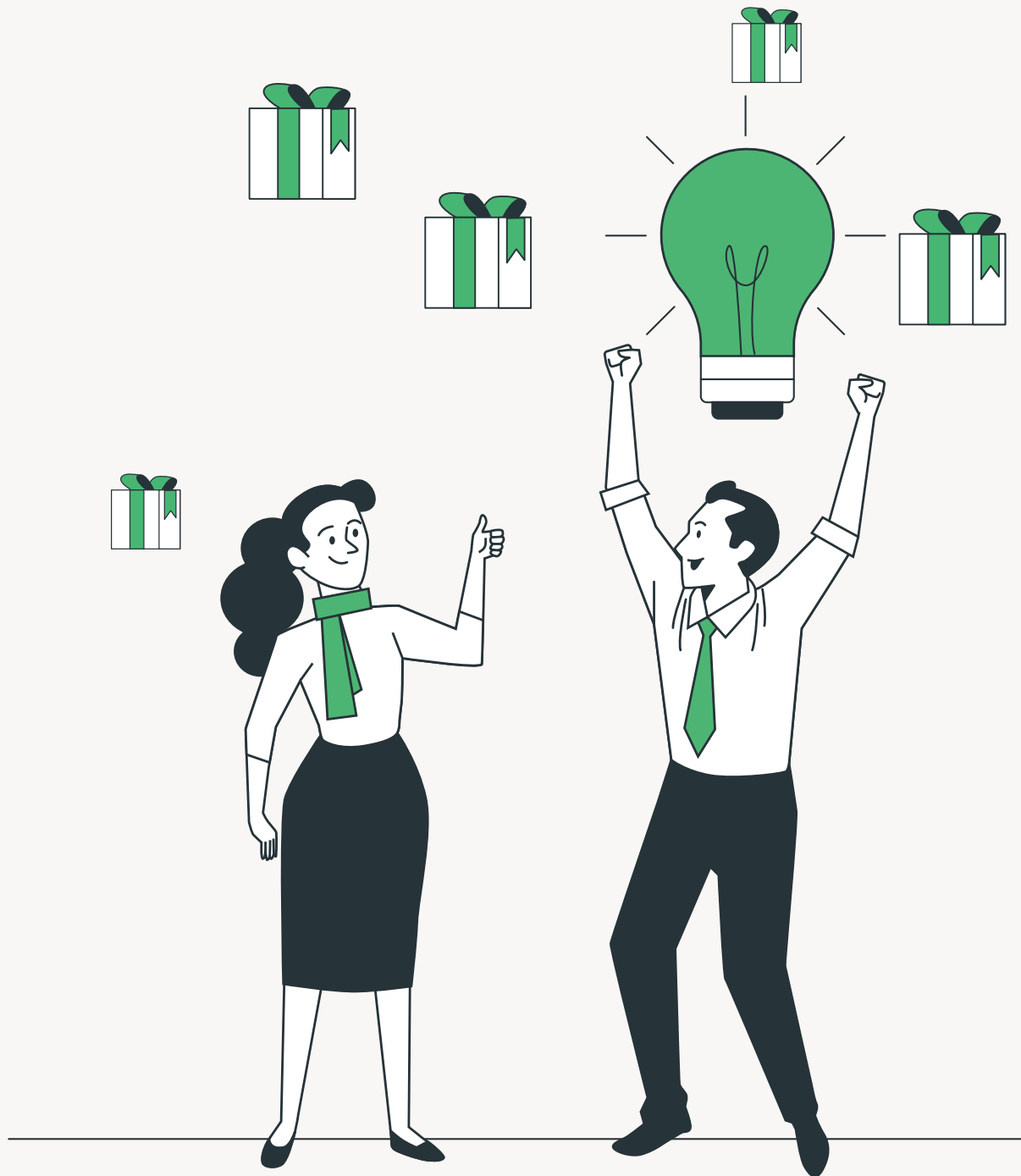
- Is your matching gift tool embedded in your donation page?
- Do you provide your matching gift search tool post-transaction?
- Are you capturing and storing matching gifts based on donor records captured via your search tool?
- Are you following up with donors via email?
- Are you conducting personalized outreach via phone to any of your donors?

Once you've optimized your online donation process, shift your focus to the offline donation process. Specifically, you'll need to answer the following key questions:

- Are you mentioning matching gifts in your direct mail outreach?
- Are you providing links to your dedicated matching gift page?
- Are you capturing or asking for employer information for offline donations?
- Are you following up with donors via email?
- Are you conducting personalized outreach via phone?

Best Practice: Nearly half of all nonprofit website traffic comes from mobile and tablet users. Because of this, you'll want to consider the matching gift process for mobile donors. How much information do they have to rifle through to complete the process? To start, limit text and images on matching gift appeals as much as possible without sacrificing value.

Concluding Thoughts



Concluding Thoughts:

We hope that you've found the information within this guide insightful and helpful for improving your nonprofit's donor journey. Whether or not your matching gift donor's experience is positive or negative can be the defining factor in whether or not you secure future matches. In fact, it may even determine if you ever receive an initial gift in the first place.

Creating a positive experience is easier said than done, though. It takes a full understanding of the matching gift process from start to finish and requires you to put yourself in your donor's shoes. From the moment someone makes a gift to the moment you follow up, your team must proactively prioritize and improve the donor experience.

Above all, remember that donors are the backbone of your organization. If you want to keep them around, you need to do everything you can to optimize their time and support. By leveraging the tips presented in this guide, you'll be off to a great start!

From here, consider these actionable next steps to take back to your team:

Step 1: Consider your current donation processes.

Step 2: Talk about matching gifts with your donors and proactively follow up.

Step 3: Streamline your verification processes.

Step 4: Continue to engage with match-eligible donors outside of solely matching gifts.

Now that you're well-versed in what a positive donor journey looks like with matching gifts, feel free to share your newfound knowledge with your team. Go into it with enthusiasm and you're sure to improve the donor journey in no time!

About Double the Donation



Double *the* **Donation**
matching gifts made easy

About Double the Donation

At Double the Donation, our mission is to help nonprofits and educational institutions increase fundraising from corporate giving programs. Our services make receiving matching gifts and volunteer grants quick and easy. By partnering with our expert team, our clients can focus on what's truly important: serving their core missions—whether that's education, community enrichment, scientific research, or charitable giving.

Regardless of your mission, our team of professionals and our robust matching gift platform will help you to improve the donor experience through matching gift fundraising.

Double the Donation is the industry leading employer matching gift tool. Serving thousands of clients, Double the Donation makes it easy to identify match-eligible donors, automate empowering calls to action, track actionable metrics and drive matching gift revenue for fundraisers across industries.

See how **Double the Donation** can improve your **organization's donor journey** with matching gifts.

[Schedule a Personalized Demo!](#)

