

# GIVER DEVELOPMENT *Training Webinar*



# PRESENTERS



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# TODAY'S WEBINAR CONTENT

- Overview of New Giver Development Features
- First Time Giver Search, List, Trigger & Strategy
- Second Time Giver Search, List, Trigger & Strategy
- \$5000+ in 30 Days Search, List, Trigger & Strategy
- Lapsed Giver Search, List, Trigger & Strategy
- Q/A



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# GIVER DEVELOPMENT - OVERVIEW



***Giver Development is...***

- Taking your data and applying a strategy to **acquire, retain, and grow ALL givers** to their next level of giving.



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# GIVER DEVELOPMENT - OVERVIEW

## ***How: Giver Segmentation & Communication...***

- All Givers
- New Givers
- Core Givers
- Top Givers
- *...and according to financial commitment Bands*



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# NEW IN MORTARSTONE

*We have redesigned your software application into 2 easy to understand categories:*

1. What does our data say about our churches givers/giving?
2. What can I do to apply a strategy & workflow to grow our giving and givers?



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# NEW GIVER STRATEGY

- Identify Through the software
- Have Communication Templates ready (Letter, Email, Text, Phone Script)
- Decide Who, What, When
- Manage to your Goal, Inspect what you expect





# SECOND TIME GIVER STRATEGY

- Identify
- Have Communication Plan Ready (*What our Church is about...a story, achievement and way you are impacting the community. How they can get involved further...)*)
- Decide Who, What, When
- Manage to your Goal, Inspect what you expect
  
- **Questions to Consider:** If they Made a 2x gift...how soon was it? If they didn't make a 2x gift...why not? If they made a 2x gift did they get involved in a next step?



# \$5000+ GIVER STRATEGY

- Identify
- Have Communication Plan Ready (*Make sure you have a 'Thank you' prepared to send in multiple communication channels. Invite them to a lunch or coffee to learn about them, and to share the bigger vision of the church in the next 1, 3, 5 years).*)



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# LAPSED GIVER STRATEGY

- Have Communication Plan Ready (*Pastoral Team to Call/Connect Pray and connect to the next appropriate place/person etc.*)
- Decide Who, What, When
- Manage to your Goal, Inspect what you expect
- **Questions to Consider:** Was this person in need? Were they offended? Did they move? Does anyone else on your team know them? Was there a crisis in their life?



# Next Steps

**Questions? Need help setting up your Giver Development Workflows?**

Contact [Joe@mortarstone.com](mailto:Joe@mortarstone.com)

**Want customized monthly coaching calls?**

Contact [Meagan@mortarstone.com](mailto:Meagan@mortarstone.com)