

# The Stewardship First Aid Kit

How to Turn Leads into Lifelong Supporters  
(Without the Burnout)





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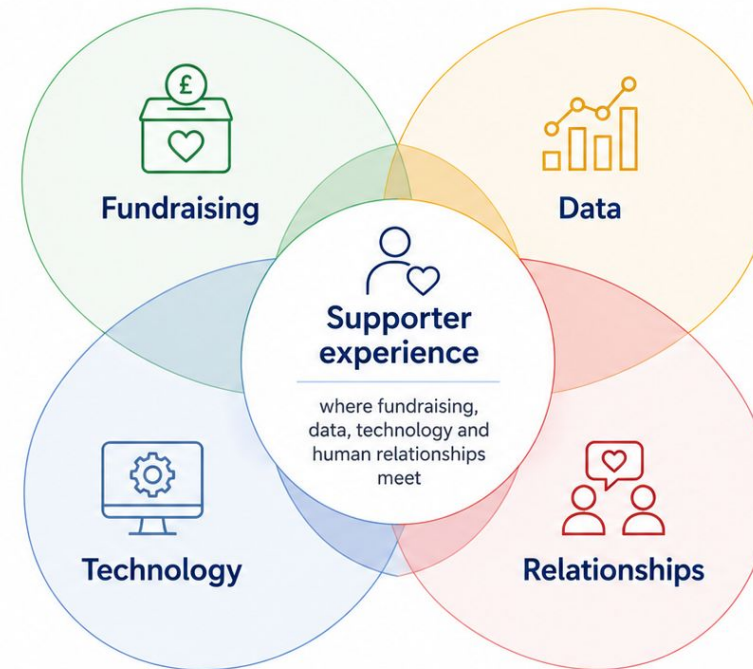
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- 20 years experience in fundraising, data and innovation
- Worked at charities like Marie Curie, GOSH and National Autistic Society
- General charity geek

Today is not about abstract theory.

It's about how to:

- spot where supporter journeys are leaking
- convert warm leads before they cool
- personalise without adding manual work
- use automation without losing the human touch
- protect fundraiser capacity





By the end, you will know how to:

- diagnose common SX fails
- understand why leads “ghost” email journeys
- use tech to reduce manual data work
- personalise at scale using behaviour
- design the first 48 hours after a lead shows intent
- use 1-to-1 WhatsApp automation without adding team burden
- measure conversion and capacity together

# **The problem:** Why supporter journeys break



Does this sound familiar?

“ We don't have capacity for stewardship.”

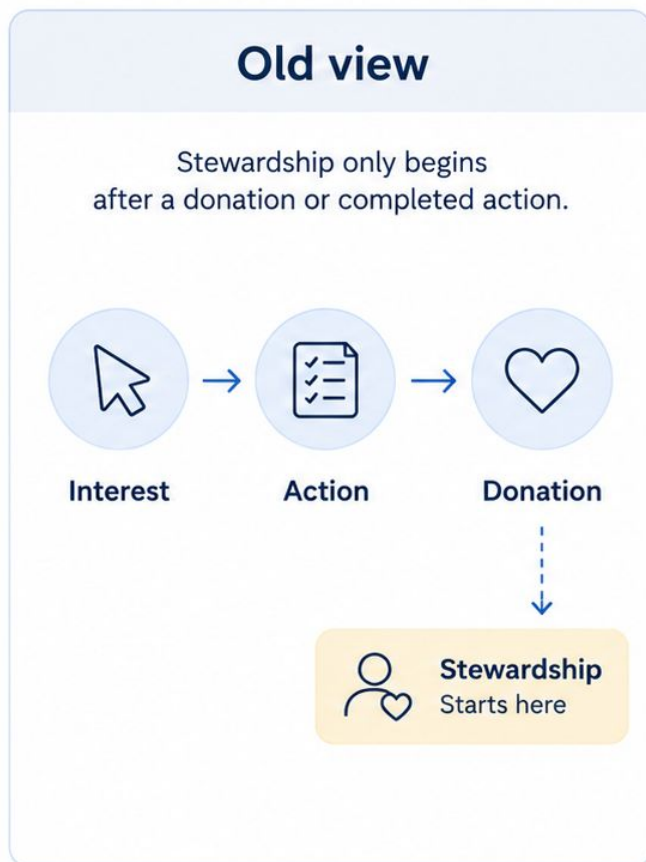
“ Our CRM doesn't talk to our marketing tools.”

“ We need to automate, but we don't know where to start.”

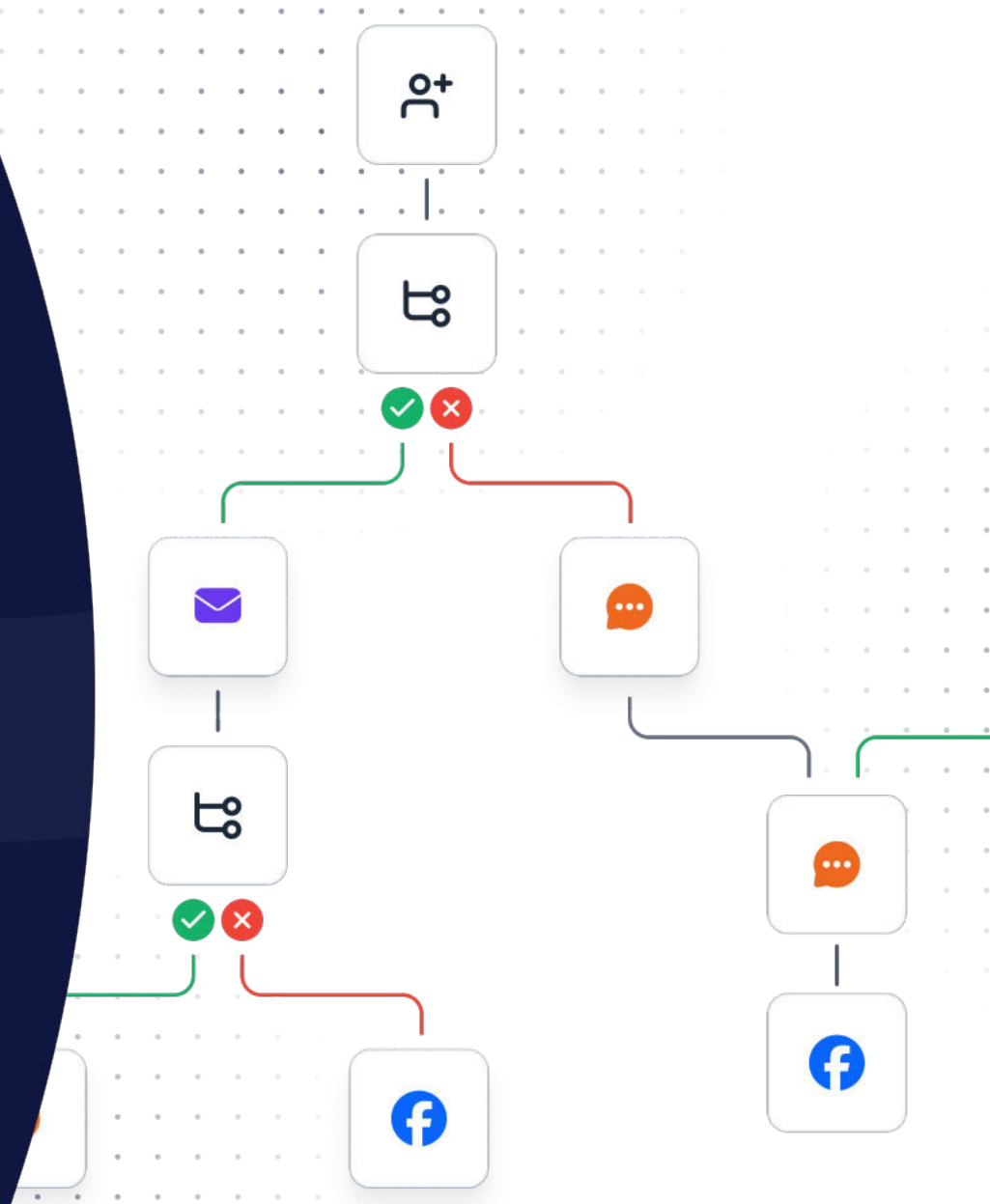


You are not alone.

## Stewardship starts earlier than we think



# The Stewardship First Aid Kit **in practice**



## A practical way to respond when supporter intent is at risk.

### Stages

1. Diagnosis — Where is the journey breaking?
2. Triage — Who needs what kind of response?
3. Treatment — What is the smallest useful intervention?
4. Recovery — How do we regain lost momentum?
5. Prevention — How do we stop it happening again?



## A journey in distress usually shows symptoms before it fails.

- warm leads going cold
- registrants not creating fundraising pages
- pages with no first donation
- active fundraisers going quiet
- supporters receiving the wrong messages
- replies going unseen
- fundraisers manually stitching the journey together



- ✓ Delay
- ✓ Confusion
- ✓ Data gaps
- ✓ Wrong channel
- ✓ Too much ask
- ✓ No clear next step

## Standard lead funnels break when:

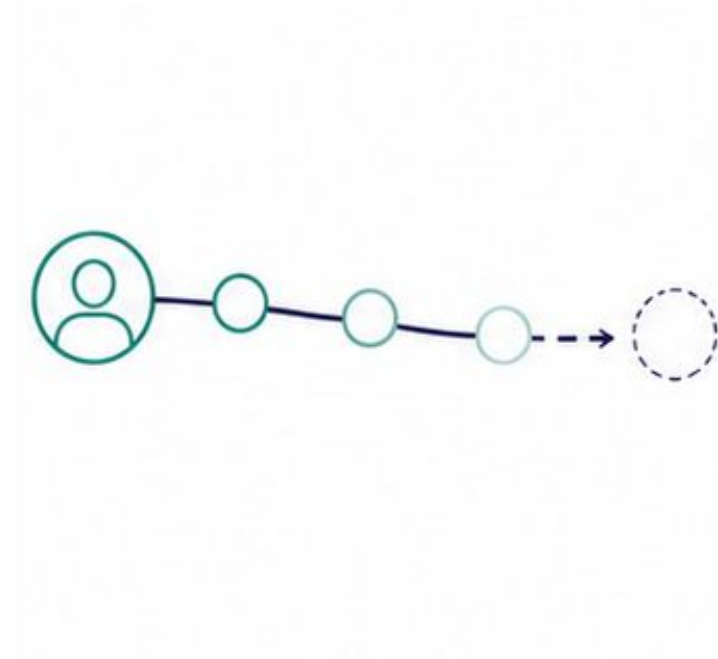
- The journey starts too late
- Everyone receives the same message
- The ask is unclear
- The data does not move
- No one owns the handoffs



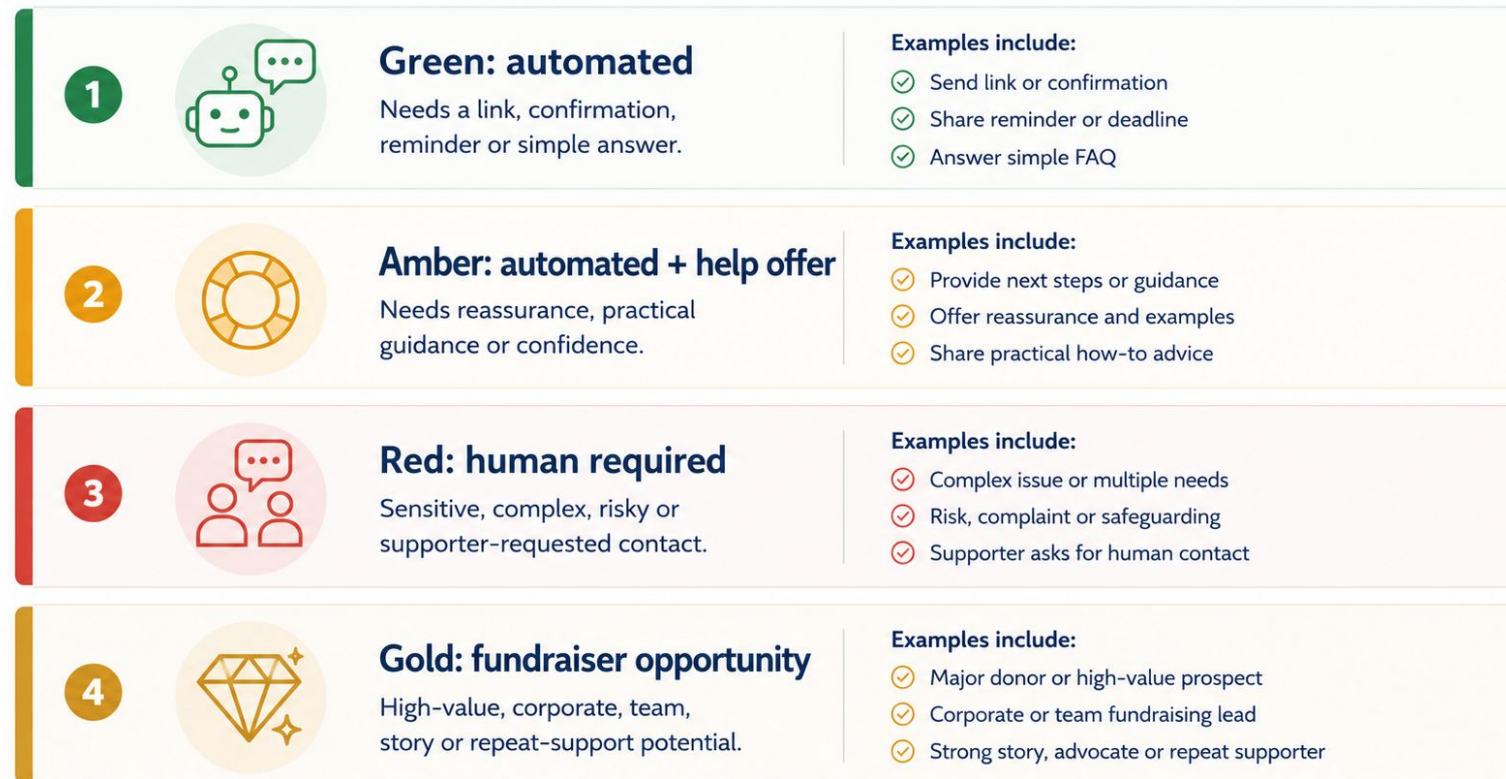
## Your leads are not ghosting because they hate your charity.

They disappear when the journey is:

- too slow
- too generic
- too confusing
- too much work
- on the wrong channel
- not responsive to behaviour
- asking before it has reassured



## Triage: who needs what kind of response?

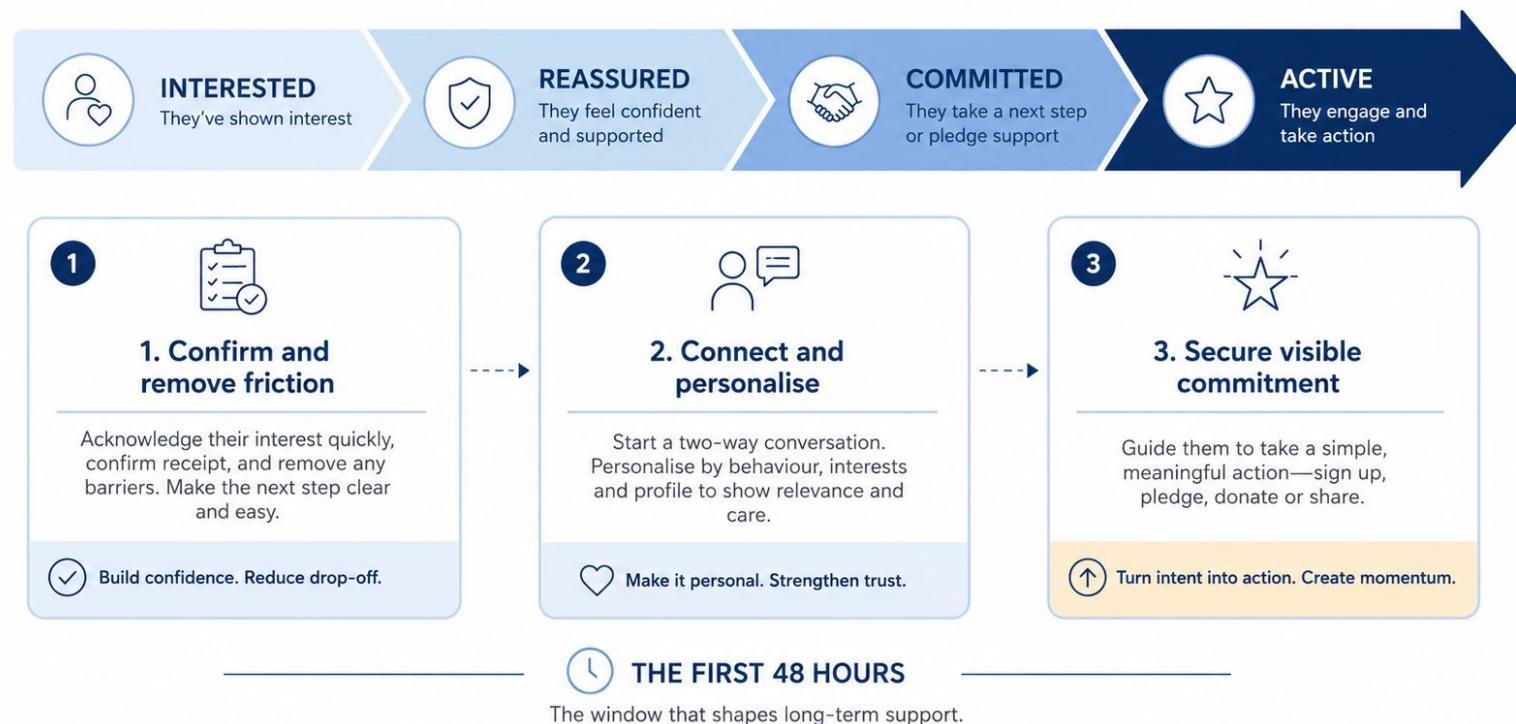


Use this four-lane triage model to route every message to the right response at the right time.

The goal is not to bombard supporters. The goal is to stabilise intent while it is still fresh.

## THE FIRST 48 HOURS JOURNEY

Guide your supporter from interest to action in the first 48 hours.



## The first message has five jobs.

1. acknowledge the exact action
2. reassure the supporter
3. give one clear next step
4. explain why that step matters
5. offer a simple help route



Ask (them or yourself) what is stopping them. Most barriers are predictable.



- “Can I raise the target?”
- “Am I fit enough?”
- “How does the charity place work?”
- “I’m waiting for a friend.”
- “I don’t know what to write.”
- “I need to speak to someone.”

Move the supporter from private intent to public action.



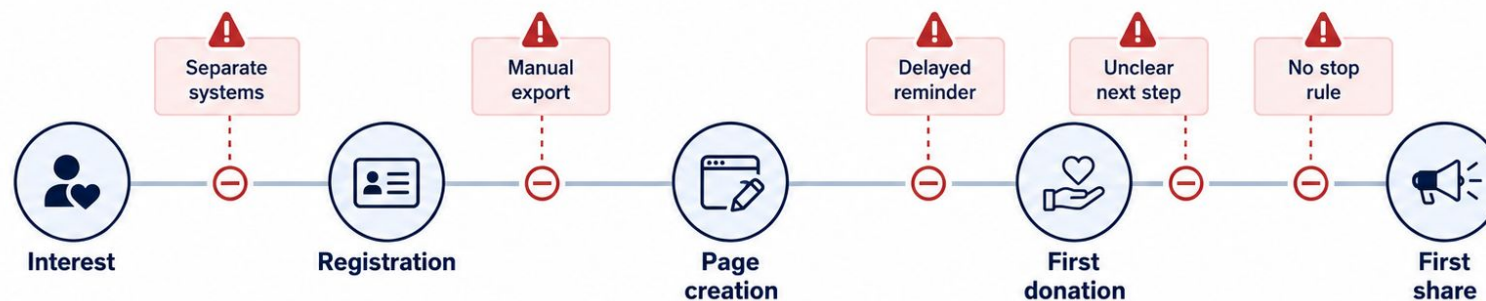
✨ A fundraising page turns 'I'm interested' into 'I've started'.

Visible commitment might be:

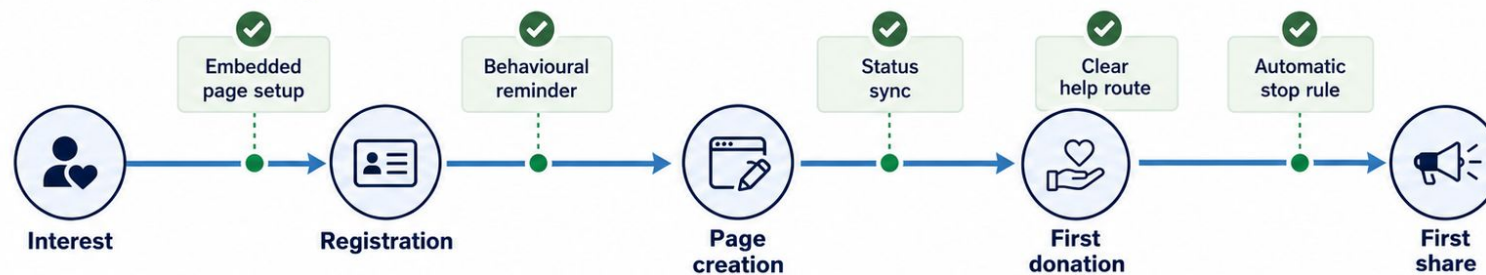
- fundraising page created/updated
- first self-donation made
- first share sent
- team or community joined

The more steps between interest and action, the more supporters you lose.

## Too much friction



## Better journey



**Result:** Fewer drop-offs. Faster setup. More confidence. Better outcomes.

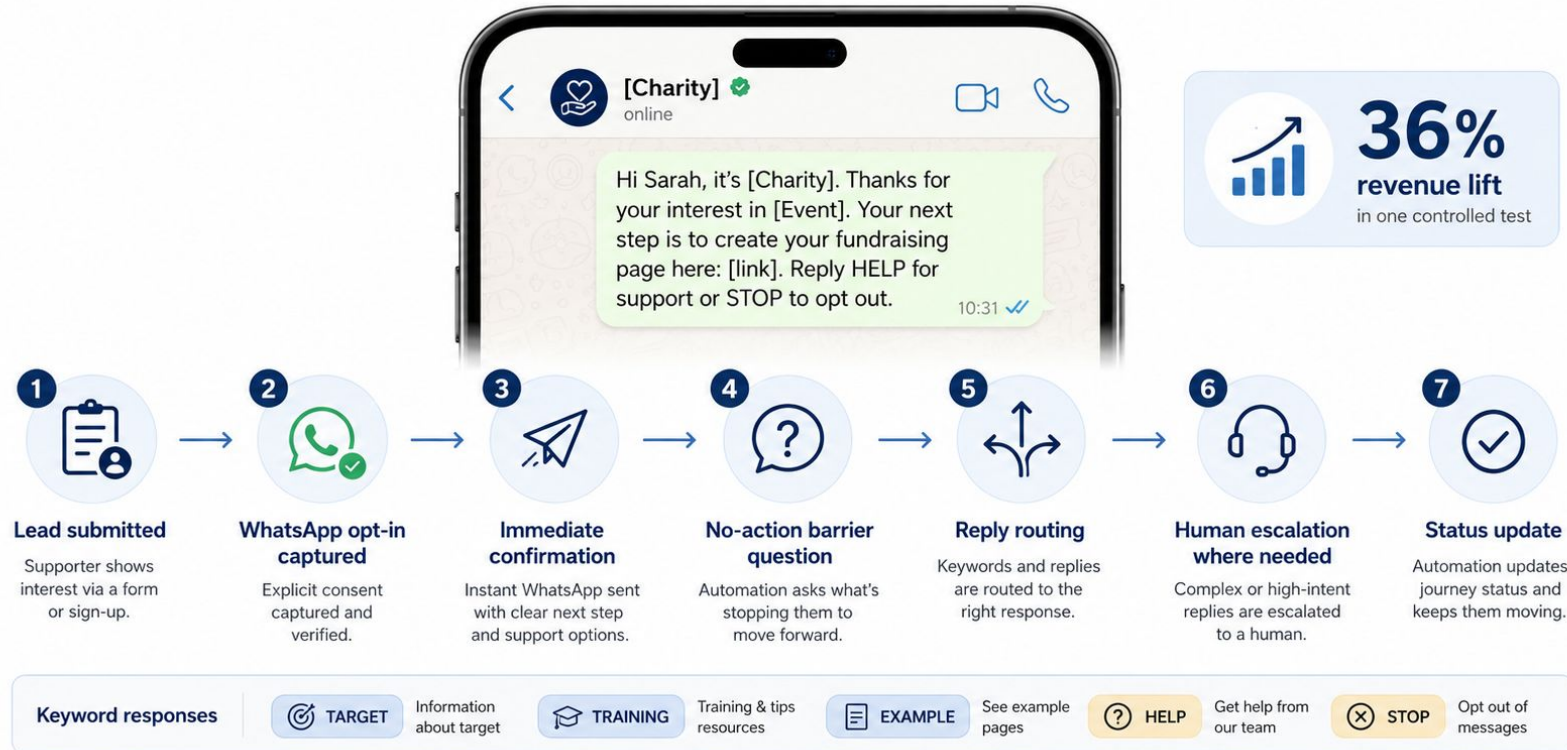


**More impact.**

Not a broadcast. Not a newsletter. A fundraising assistant in the supporter's pocket.

## 1-to-1 WhatsApp Automation Flow

Timely messages. Clear next steps. Better supporter journeys.



**A stalled supporter is not always a lost supporter.**



## RECOVERY: RESCUE SUPPORTERS WHO STALL

A stalled supporter is not always a lost supporter.

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**1**  
**Registered, no page**  
Send a page setup prompt and explain why the page matters.
- 

**2**  
**Page created, no first donation**  
Offer wording, confidence and a low-pressure first ask.
- 

**3**  
**Active fundraiser goes quiet**  
Recognise progress and give a new reason to share.

 You're not behind. Lots of people sign up first and start fundraising later.  
**Want a simple restart plan?**

 **Recovery is not chasing. Recovery is care.**

 **Small nudge. Big comeback.**

## PREVENTION: STOP THE SAME LEAK HAPPENING AGAIN

You do not need perfect data. You need usable data.



### Minimum viable data

- first name
- email and mobile
- event or campaign
- lead source
- registration status
- fundraising page status
- first donation status
- amount raised and target
- consent and permission by channel
- opt-out and suppression flags
- last action date
- help or escalation status



### Stop rules

Stop or change the journey when the supporter:

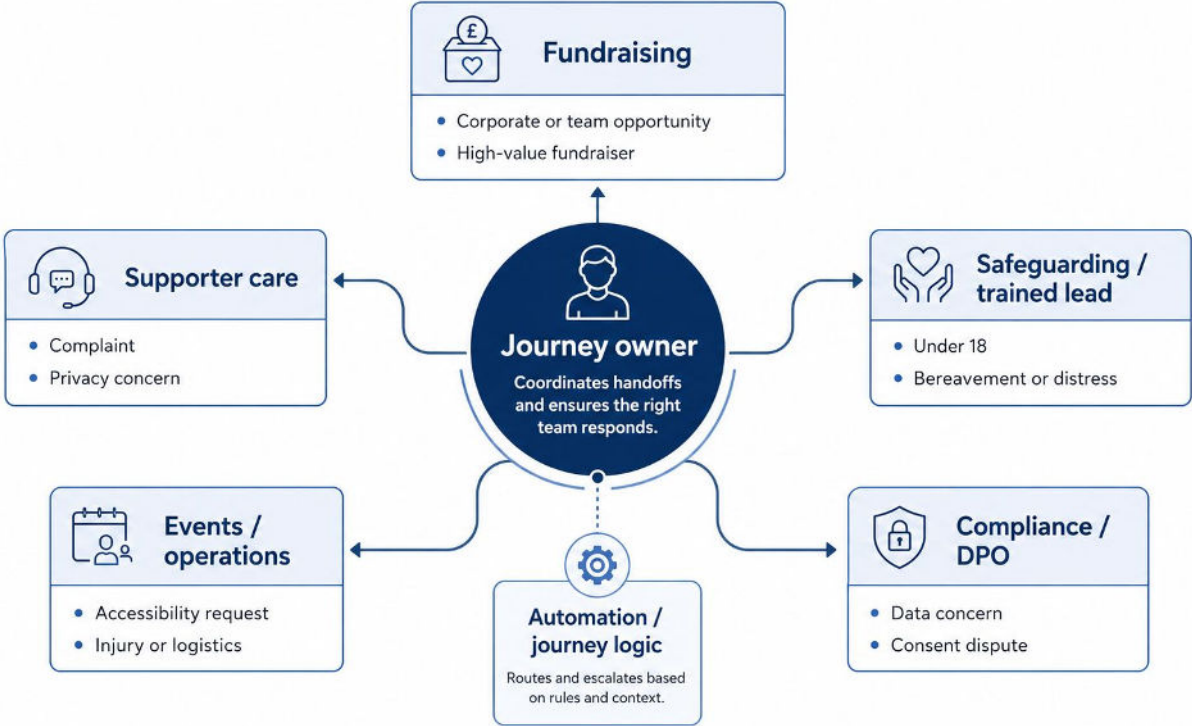
- registers
- creates a page
- receives a first donation
- replies HELP
- opts out
- enters sensitive escalation



**Stop rules are stewardship.**

## Automation should know when to get out of the way





























Understand when something needs escalation and who they need to talk to.



(These people all might be you, but it's still important to understand the types of escalation)

## MEASURE CONVERSION AND CAPACITY

The best journeys increase income and reduce avoidable manual work.

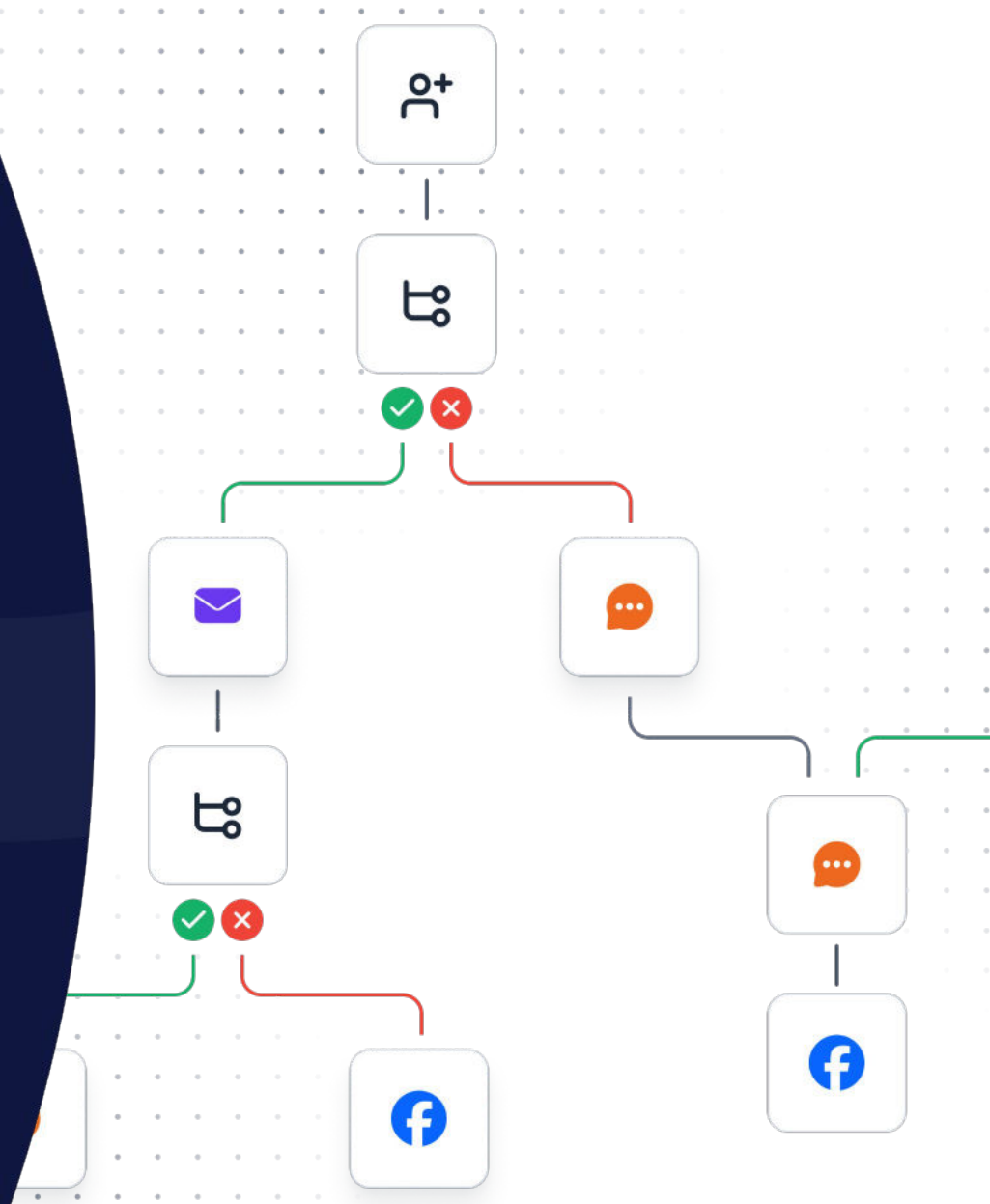
Conversion metrics		Grow income Improve results	Capacity metrics		Reduce work Increase capacity
£	Cost per lead			Manual tasks avoided	
	Lead-to-registration rate			Time to first response	
	Registration-to-page rate			HELP replies handled	
	Page-to-first-donation rate			Fundraiser backlog	
	Time to first donation			Opt-out and complaint rates	
	Average raised per active fundraiser			Wrong-message incidents	
£	Revenue per lead			Duplicate records fixed	
	Repeat participation				



**Supporter experience is not a soft metric.** It is measurable operating performance.



# Action Plan



## 30-Day Roadmap

Five milestones to strengthen supporter journeys and grow income.



## Supporters do not need perfect journeys.

They need journeys that are:

- timely
- clear
- relevant
- respectful
- easy to act on
- human when it matters

### AUTOMATE THE DRAG. HUMANISE THE MOMENTS.

Supporters do not need perfect journeys.



**Any Questions?**

**Thank** **you**



**Social  
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