

Hello!

I'm Simon

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Today I'll be talking about **Whatsapp and SMS for supporter engagement**



Conversr

- Curators of 1:1 supporter stewardship journeys at scale
 - ◆ **"1:1 Stewardship"** = what major gift fundraising teams can do for high-value donors. Conversr brings that relationship to mass pax fundraisers via direct-to-handset messaging (D2H)
- Conversr helps teams create and deploy SMS journeys alongside leading fundraising platforms like Funraisin, JustGiving, GivePanel etc
- We work closely with a small group of partners supporting both owned and third party Walk, Run, Cycle events etc. Avg. 24%  vs. control

What we'll cover today

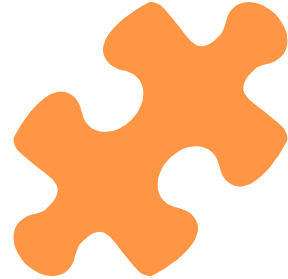
WhatsApp and SMS for
supporter stewardship



The five questions
every fundraising
team should ask



The importance of the
"postman principle"



Why now?

- D2H channels are one of the few that haven't degraded into junk
- D2H messaging is reported on poorly:
 - 1) sector studies on "sms" tend to focus on direct fundraising asks only
 - 2) TOFU metrics like "coverage" & "CTR" overstated vs fundraising impact
 - 3) new-ish approaches (AI, soft opt-in, Whatsapp)
- Limited A/B testing of Whatsapp and SMS:
 - ◆ Not equivalent in capability so making the "journey" truly identical is hard.
 - ◆ WhatsApp API access (via platforms like Conversr, Social Sync, DotDigital, Twilio etc) is newer, costlier, and more complex to set up vs SMS
 - ◆ Few orgs have both channels mature, resourced and running

Let's start with the basics

- Every direct to handset channel offers the same core opportunity: **attention**
- The impact of this attention is evident = **benchmark of 20–30% lift for 2-way**
- Broadcast and conversational messaging are different. Be aware of the expectations you are setting with either approach
- Small differences across channels but **success or failure rests more on your content strategy vs your channel choice**
- The same common thread: teams stop asking "*what did this message make?*" and starts asking "*what did this message do to the relationship?*"

You had me at hello

Metric	Version A	Version B	Change
Total program engagement	58%	76%	↑18pp
Conversational engagement	34%	57%	↑23pp
Financial uplift	19%	31.5%	↑12.5pp
ROI	7.5×	12.4×	↑4.9×
Uplift per participant	£25	£40	↑£15
Cause Connection Share	5%	9%	↑4pp

Graphic: Conversr client campaign from Spring 2026

5 Questions Every Fundraising Team Should Ask before “*Whatsapp* *vs SMS*”



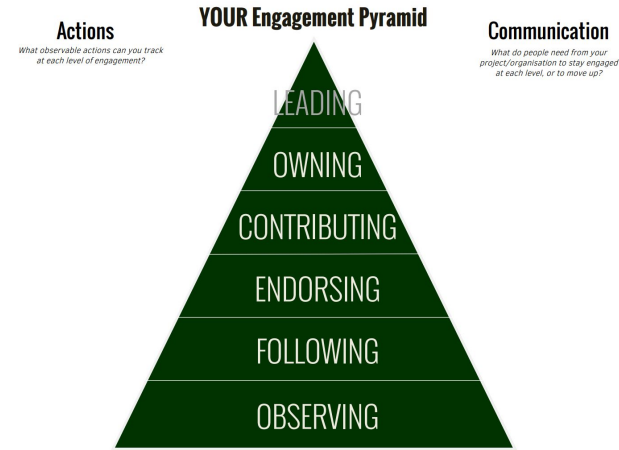
1. Are we ready for this?

- **Legal** – Know the rules of each channel, not just GDPR, but platform-specific terms
- **Tech** – You may have already have texting built into your CRM and we all have handsets, access to Whatsapp groups etc but to do this safely at scale you need a workflow that works
 - ◆ Rich conversations between your supporters will unearth data challenges
- **Human** – Two-way messaging is time intensive – who answers? how fast? do those replies sound human? If you can't resource a real conversation, be honest about it. It doesn't mean you can't text but it does change your approach

2. What's the goal with this program?

- Be wary of blending your goals:
 - ◆ Marketing channel — built for reach and conversion (needs opt in)
 - ◆ Stewardship channel — built for trust and relationship (can often rely on LI)
- Deep curation of the supporter experience is required as there's a fine line between helpful and intrusive
- Think about how supporters engage at different “depths” of the campaign

Not all stewardship is equal
(*informational vs conversational*)

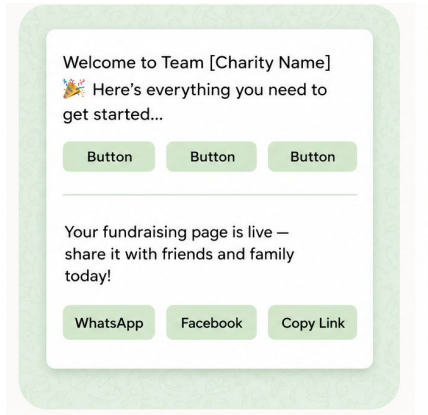


Graphic: Social Change Engagement Pyramid

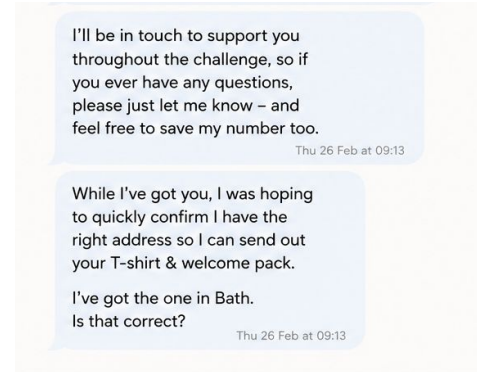
3. What do we want our supporters to feel?

- Chat experiences have changed. Think ChatGPT, Amazon, DPD etc. People often say they're happier talking to a bot than a human **if it solves their problem faster**. But those surveys are measuring effectiveness, not relationships
- Stewardship of fundraisers is a different job entirely. It's not about resolving a query fast, it's about a supporter feeling known
 - ◆ *"I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel"*
- Two kinds of trust are at play in every message you send:
 - ◆ Trust that you are speaking to a brand — professional, consistent, safe
 - ◆ Trust that you are not — personal, human, worth replying to ✨
- The worst thing you can do is fall into an uncanny valley between the two

4. Are we messaging as a person or a presence?



Org voice — polished, informative, rich media, triggered, clear CTA. Good for someone needing information



Human voice — a name, a question, an invitation to reply. Good for someone wanting to feel connected

This is perhaps the single biggest choice to make. Org voice can be compelling & trusted but people rarely build relationships with a brand. Both approaches have a place but this choice will impact your content and your results more than any channel

5. How should we measure success?

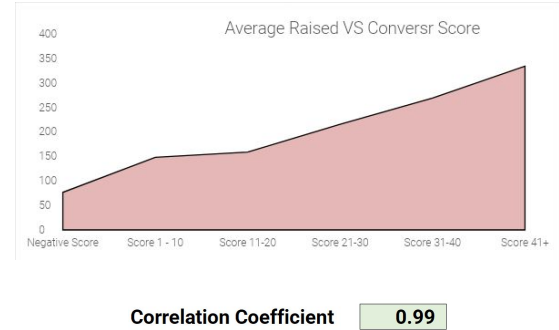
→ Attention is guaranteed to be higher on phone than via email so don't compare to other channel benchmarks

→ More messaging $\neq$ Higher Engagement

Higher Engagement = Higher Fundraising

→ This means, even if we can't directly influence fundraising, we should do anything we can to influence engagement

→ Providing value & building trust are both better ways to get engage than making more asks



Graphic: Conversr data showing the correlation between engagement scores and fundraising performance of event participants

Before you choose a channel, answer these Q's...

1. Are we ready for this? (legal, tech, human capacity)
2. What's the goal? (revenue or relationship)
3. What do we want supporters to feel? (answered or understood)
4. Are we messaging as a person or a presence? (branded or human)
5. How will we measure success? (more doesn't equal better)

There's no universally correct channel here & in most cases asking the right questions is more important than finding one answer

TL;DR

S

Person-to-Person SMS: Incredibly personal, doesn't scale, relies on individual

A

Org-to-Person SMS: API driven, Simple, Universal, cost per character & basic formatting
Whatsapp API: Super engaging, SMS fallback requires opt-in, templates, Meta reliance
RCS: Rich media & "trusted" but higher cost & inconsistent device support

B

Whatsapp Groups: Powerful community tool but difficult to moderate at scale, privacy concerns, unsuitable for 1:1 stewardship

C

Messenger: Limited usefulness if supporters aren't active on Facebook
Owned apps: Requires users to have installed the app and enabled notifications

D

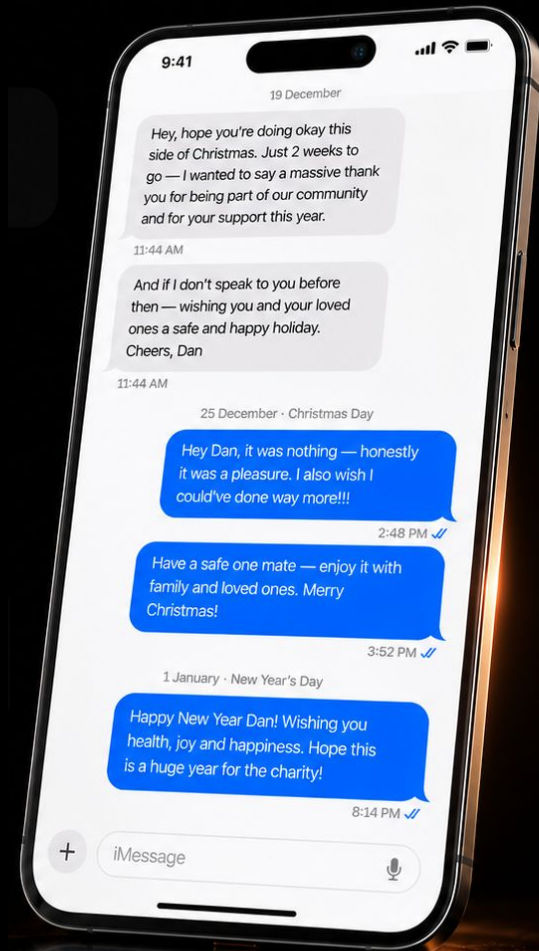
MMS: Expensive & clunky

Why we focus on SMS

- Whatsapp beats SMS in providing motivation, information and encouragement in a visually engaging way. However, supporters often form their opinions on organisations based on human interactions and peak highs and lows vs logic alone
- We think using D2H to engage rather than connect underserves the opportunity
- D2H offers a rare opportunity to engage humanly: *“if you could phone every supporter who enters your organisation for the first time you would”*
- For human-to-human stewardship at scale, three things give us pause on Whatsapp:
 - ◆ *Polished isn't always our friend – we make deliberate attempts to appear low tech in order to increase engagement*
 - ◆ *Compliance with SMS is about legal classification, with WhatsApp, you're also subject to a private platform's rules. Do you want critical services to be dependant on services that you are at risk of being cut off from?*
 - ◆ *WhatsApp's terms structurally limit spontaneous human response outside of 24 hours*
- Our approach is unique and difficult to get safely right but the results are outsized when done well

"People don't have an opinion of Royal Mail.
They have an opinion of their postman."

Rory Sutherland



The Final Verdict

- **WhatsApp** is powerful channel esp where rich media, branded experiences and campaign storytelling matter. Its current design and business rules make long-term, 1:1 relationship building more complex.
- *Best suited to: marketing, campaigns, storytelling, and customer service style support.*
- **SMS** is simple, universally accessible and almost invisible technology. That simplicity keeps the focus on the conversation rather than the channel, making it well suited to authentic human relationships.
- *Best suited to: stewardship, two-way conversation, and programmes where the relationship is central.*
- **A well-designed journey on either channel can deliver exceptional fundraising results. The channel is only one part of the equation; the strategy, timing and quality of the conversation determine whether supporters feel like active participants or well supported followers.**



Wider Resources



- **Engagement Pyramid:** <https://commonslibrary.org/engagement-pyramid/> - Social Change Library
- **Meta Guidance:**
<https://whatsappbusiness.com/resources/resource-library/whatsapp-vs-whatsapp-business/> - Meta
- **Whatsapp Journeys:** <https://socialsync.io/features/whatsapp-journeys-for-nonprofits> - Social Sync
- **P2P Messaging:** <https://www.youtube.com/watch?v=8g79Q1EDvsU> - Conversr
- **Soft Opt In & Text to Donate:** <https://opencreates.com/channel/soft-optin-law-change> - Open Creates
- **Whatsapp for Marketing:** <https://dotdigital.com/whatsapp-marketing/> - DotDigital
- **The Postman Principle:** <https://www.youtube.com/watch?v=3rZSxFX7pio> - Rory Sutherland
- Or email me simon@conversr.com