



Classy

NEW USER PLAYBOOK:

# How Successful Nonprofits Stand Out

## Take a page from Classy users who drive the most donations in their first 90 days.

We've seen which actions lead to success, along with those that cause organizations to stumble. Our New User Playbook synthesizes the steps you can take to make the most of your first few months.

## We want you to be effective. More importantly, we want to show you what "effective" looks like.

These insights are based on our most successful nonprofits (of all sizes) and what helped them achieve the following success in just 90 days on the platform:



*\*Compared to users who start in the same time frame and don't leverage the following actions.*

## Where Will You Be in 90 Days?

The tactical steps below provide a proven path to strong ROI, as well as pro tips to go above and beyond to truly stand out.



**MEET RACHELE**  
Lifecycle Manager at Classy

As you work your way through this document, she'll offer her expertise to show you the best way to make the most of your time.



## Build Classy Into Your Routine

### KEYS TO SUCCESS

- ✓ At least **31** days out of the first **90** spent logged into the platform
- ✓ **15** hours spent in the platform on average within that period



### HOW TO GET A HEAD START

Set aside time each day to log in, even if only for short periods. You can use this time to:

- ✓ Familiarize yourself with the platform and the tools available to you
- ✓ Comment on the activity wall to personally thank donors
- ✓ Review new opportunities to build donor relationships
- ✓ Review new donations



*“Successful organizations log in daily to review incoming donations and engage donors. By integrating Classy into your routine, you can send timely, personal comments to donors via the activity wall to acknowledge support and create an excellent experience.*

*Whether it’s growing your recurring giving program, coaching fundraisers, or building relationships with new donors, there are always opportunities to further engage your community.”*

## Get More of Your Team Involved

### KEYS TO SUCCESS

- ✓ 4 average users making use of various platform benefits

### HOW TO ACCELERATE GROWTH

Set aside time each day to log in, even if only for short periods. You can use this time to:

- ✓ Invite your colleagues to explore the platform early on to support tasks and maximize the value of every feature

For example:

**IT** will want to maximize integrations with other tools in their ecosystem.

**Development and fundraising** will likely own campaign creation, supporter management, and reporting.

**Database owners** will likely look to see that gifts sync up with a CRM like Salesforce.

**Finance** can reconcile donations and surface insights on incoming revenue.



*“When getting started with Classy, invite colleagues to join from the very beginning. Bring them along for the ride and get their feedback as you share the tools that Classy offers. Beyond just fundraisers, your designers, marketers, and operations teammates will benefit from having access and an understanding of what Classy can do.”*

**Marketing and design** can lead the storytelling efforts of each campaign and use Classy’s tools to ensure your brand shines through in your campaigns’ designs and narratives.

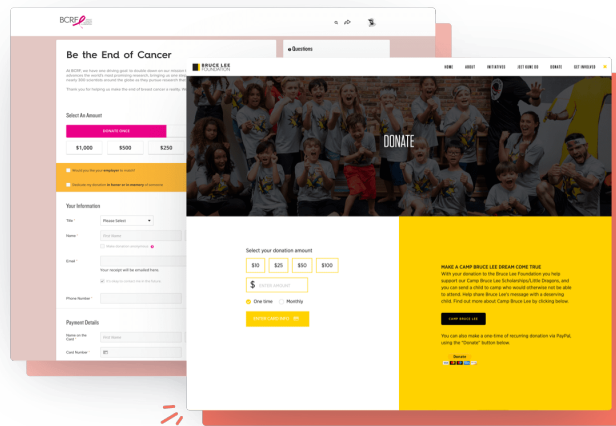
## Get Campaigns Up and Running

### KEYS TO SUCCESS

- ✓ Fundraising campaigns set up in the first 90 days led to an average of
  - **99** total transactions
  - **\$9,582** in online donations

### HOW TO ENGAGE DONORS QUICKLY

- ✓ Set up at least 2 campaigns on Classy to see fast ROI
- ✓ Establish a dedicated recurring giving campaign to maintain donations year-round



*“Most users come to Classy with a plan for their first fundraising campaign. The most successful users also have a plan for sustainable and diversified revenue streams. They set up their main donate button, a dedicated recurring giving campaign, and a year-round peer-to-peer fundraising campaign. They recognize the importance of balancing their time and energy across these different types of fundraising programs.”*

## Take Advantage of All the Features Available to You From Day One

### KEYS TO SUCCESS

- ✓ **28** actions were taken by our most successful customers in the first 90 days to enhance the donor experience, such as:
  - Personalizing thank you pages
  - Adding a contact to each campaign to support donors
  - Customizing campaign-sharing settings and pre-populated language to social platforms
  - Customizing the default personal fundraising pages (description and images) for peer-to-peer fundraisers

### HOW TO MAXIMIZE YOUR TIME

- ✓ Start clicking through the various customization options available where they apply to your organization and donors
- ✓ Explore and ask questions about everything your platform can offer
- ✓ Attend the [Weekly Classy Coaching Series](#) to master powerful features right away



*“Once you’ve created your initial campaigns, customize your email donation receipts and set up key integrations. Think through and test the donor experience from start to finish. From there, build and customize reports that will deliver the insights you need to measure success and iterate in the future.”*

## Get Familiar With the Features Proven to Drive Results

Our platform data shows that the most successful nonprofits use the following features, yet many Classy users miss the opportunity to take advantage of them. Stay ahead of the curve with these important and accessible tools to drive your donation volume.

FEATURE	WHAT IT IS	HOW TO USE IT
<a href="#">Custom Donation Values</a>	Found on all donation pages and can be chosen strategically to drive higher average gift amounts.	In your <b>Donation Settings</b> , select specific amounts based on your audience and their current average gift sizes. Start with the highest amount as a reach, followed by your average and lowest gift sizes.
<a href="#">Default Donation Amount</a>	The value that is automatically populated on the page when a donor lands there to drive higher conversion rates and gift amounts.	In your <b>Donation Settings</b> , select a specific suggested amount appropriate to your audience. <a href="#">Research shows</a> that \$100 is a commonly used increment across the social sector to encourage conversions.

### CLASSY USER FEEDBACK: FIRST BOOK

*“Classy has allowed us to improve our strategy and focus on a streamlined donor-experience. In our first few months using Classy, our donation conversion rate grew 18.5%!”*



FEATURE	WHAT IT IS	HOW TO USE IT
<a href="#">Cover Fees by Default</a>	Empowers supporters to expand their impact by contributing to your fees.	In <b>Organization Settings</b> under <b>Classy Mode</b> , choose a percentage that adds on to the final amount if the donor is willing to help cover a portion of fees. Most donors are.
<a href="#">Donation Matching</a>	Adds urgency to a campaign and increases the overall volume of donations that come in. This occurs when a sponsor company or individual agrees to match your campaign donations dollar-for-dollar for a specific time or up to a certain dollar limit.	In your <b>Campaign Detail Settings</b> , you can activate a match by adding a campaign sponsor.
<a href="#">Activity Wall</a>	Displays all recent donation activities. It allows you to easily send timely and personal thank you notes to donors as a special acknowledgment on top of the automated email receipts they receive.	Use the <b>Activity Wall</b> to comment on donations, ticket purchases, or the creation of personal fundraising pages. Your supporters will receive these personal notes through email.

## CLASSY USER FEEDBACK: GALLANTFEW

*“When we learned about the activity wall, we knew it was a perfect way to express donor gratitude on an individual basis without it being difficult or time-consuming. We set up an account for volunteers to comment on donations on our behalf within our Classy account. One volunteer even applied for a service grant for the time she spent.”*





FEATURE	WHAT IT IS	HOW TO USE IT
<a href="#">Customized Donation Receipts</a>	Allow you to personalize the message sent to donors after they donate.	In the <b>Email Editor</b> , customize the email content to display your organization's personal touch.
<a href="#">Classy Pay</a>	Our in-house payment processor that offers you industry-leading fraud prevention tools, automatic credit card updates for recurring gifts, and payout reconciliation right inside your Classy account. We ensure your nonprofit is paid faster and easier than ever before.	After you <a href="#">set up Classy Pay</a> , add your bank account details within the <b>Payment Processor Portal</b> to reconcile payments and deposits all within Classy.
<a href="#">ACH and Digital Wallets</a>	Simplifies the way supporters give to your organization with one-touch donations on their phone using tools like Apple Pay without ever pulling out a credit card.	With your subscription to Classy Pay, you can easily set up ACH and digital wallet payments within <b>Payment Processor Portal</b> .

## CLASSY USER FEEDBACK: OPERATION BROKEN SILENCE

*"Classy Pay ended our fraudulent transactions and sped up our weekly reconciliation process. We always appreciate anything that puts time back in our day!"*





*“There are many ways to optimize your donor experience in order to convert, acquire, and retain donors. We’re passionate about not only providing you with that technology, but also with the best practices to make the most of it. Our education offerings will help you think through your default donation amount or launch a donation match so that you can use all the features at your fingertips and grow your online fundraising program.”*

Select an amount

DONATE ONCE


DONATE MONTHLY

\$1,000

\$500

\$50

\$25



Give Hope!

\$100

Your gift of \$100 becomes \$200 of impact - providing skills training for a Solar Sister Entrepreneur.

DONATE

**LOOKING FOR FAQs, TUTORIALS, AND KEY INFORMATION?**

Visit the [Classy Support Center](#).

**READY TO DIVE IN TO GET UP TO SPEED QUICKLY?**

Visit the [Classy Coaching Series](#).

**NEED INSPIRATION, CHECKLISTS, AND TEMPLATES TO START?**

Visit the [Classy blog](#) and [resource center](#).

*Classy*