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| **M3: Offer Selling Message EveryAction** |

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| **Author** | Kay Todd | **Date Approved** |  |
| **Deck** | [M2 Pitch Deck\_EveryAction.pptx](https://bonterratech.sharepoint.com/:p:/s/BonterraProductOps/EQa2Jp6RCZdBoZ5heg6FBucBB4BPtk4nKac-ocvnpyHG_Q?e=hJABsA) | **M2** | [M2 EveryAction](https://bonterratech.sharepoint.com/:w:/s/BonterraProductOps/ERGPGjBnHr1MrSI-GZISTXsBMRvUSvkYAoB31GsIkqGr5A?e=nJW3DC) |
| **Additional Resources** | * [EveryAction Monetization Decision](https://bonterra.atlassian.net/wiki/spaces/PRDOPS/pages/1518927875/EveryAction+Monetization+Decision+Work+Unit) |  |  |

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| **Message Focus** | |
| **Audience Focus**  **(Decision in Bold)**  *Describe what broad audiences we will target with this message. The most important distinctions to make are: is this for current customers or new customers or both? If it includes current customers, all Bonterra customers, or only certain customers?* | **Target Audience:**   * **Primary:** New prospects aligned with the Ideal Customer Profile (ICP). * **Secondary:** Current F&E customers (DonorDrive, GiveGab, Network for Good, Salsa, Mobilize) who fit the ICP. * **Exclude:** Current F&E Pro and Enterprise Customers   ***Reasoning:*** *EveryAction is built for nonprofits that must scale donor engagement without the inefficiencies of disconnected tools or outdated CRMs. These organizations risk donor attrition and revenue loss if they continue relying on legacy systems. These customers could currently be using Network for Good or Salsa and looking to scale their revenue and operations. For customers using point solutions (DonorDrive, GiveGab, Mobilize), this offer can be used, but the customers should be upgraded from their current package to F&E Pro or Enterprise. Existing F&E Pro and Enterprise customers already have access to these features and should not be pitched this offer.* |
| **Ideal Customer Profile**  *Describe ideal customer profile for this message. Include the reasoning for your decision.* | * 501c3/c4 with 2,500 to 25,000 subscribers * Raise $3m to $15m in annual revenue primarily from individuals (gifts could range from $5 to multi-millions.) * Multi-channel fundraising program with at least three distinct channels   ***Reasoning:****EveryAction was built for nonprofits that need efficiency, automation, and data-driven donor engagement without managing multiple integrations. It eliminates the complexity of using separate CRM, email marketing, and fundraising tools by consolidating everything into one unified platform. Organizations that seek to replace marketing automation but not their CRM should be offered EveryAction Engagement (typically 10,000+ donors).* |
| **Target Buyer**  *Describe the target economic buyer for this message. Include the reasoning for your decision.* | **Target Buyer**   * **Buyer Persona:** Executive Director (Decision Maker) * **Typical Titles:** Director/VP of Development, Chief Development / Philanthropic Officer * **Reports To:** CEO or directly to Nonprofit Board   **Priorities and Pain Points:**   * **Top Priorities:** Grow donations, diversify revenue, and streamline operations. * **Pain Points:** Outdated tools, declining engagement, and inefficient processes * **Obstacles to Purchase:** Budget constraints, migration risks, and stakeholder alignment   **Champions:** Data/Operations Director, Digital Director   * Primary personas in the Discover, Explore and Realize Value Phases * Priorities include increasing the value of the donor database and boosting digital fundraising results   **Influencers:** IT, Major Gifts Officers  **Examples Profiles of Target Buyers**  **Development Director**   * [Terri Isabell, Chief Development Officer, Three Pillars Senior Living](https://www.linkedin.com/in/terri-isabell-8b90468/) * [Kathleen Gregory, Director of Development/Co-Executive Director, Public Justice Center](https://www.linkedin.com/in/kathleengregorycfre/) * [Kendra Penry, Executive Director, Stokes Nature Center](https://www.linkedin.com/in/kendra-penry-clutter-0b40b716/) * [Laura Minnigerode, Development Manager, Texas Gun Sense](https://www.linkedin.com/in/laura-minnigerode-938628/)   **Data/Operations Leader**   * [Freeda Brook, Senior Manager of Impact and Data Operations, The News Literacy Project](https://www.linkedin.com/in/freeda-brook-238bb326/) * [Joey Rosales, Database Administrator, PEN America](https://www.linkedin.com/in/joey-rosales-1b874898/) * [Skye Maresca, Data Manager, Equality Federation](https://www.linkedin.com/in/niarichardson1026/)   **Digital Director**   * [Casey Dumasius, Digital Marketing Director, Environmental Working Group](https://www.linkedin.com/in/casey-dumasius-737815a7/) * [Sam Baltimore, Communications Director, Jews United for Justice](https://www.linkedin.com/in/samuel-baltimore-9a18616b/) * [Nia Richardson, Communications and Special Events Coordinator, Meals on Wheels Durham](https://www.linkedin.com/in/niarichardson1026/)   ***Reasoning:*** *The Executive Director owns the decision as the budget for fundraising software and the budget lines associated. While involved in the process from start to finish as the executive champion, she delegates the Discover and Explore phases to team members who will be the most active users of the software (Data/Operations Director and Digital Director). These personas have the heaviest weight in the decision process and presenting their recommendation. Many additional stakeholders including Major Gifts and IT will be involved in the decision process, but the final decision-maker and signer is the Executive Director.*  *---*  **Excluded Buyers:**   * Program Officers * Board Members   ***Reasoning:*** *Program Officers are often interested but don’t have any say in the budget and sometimes can distract from core problems/functions the software is meant to resolve.*  *At this level, Board Members may approve a certain level of tech spend but are relying on nonprofit leadership to present a decision and lead the process.* |

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| **Buyer Mindset and Triggers** | |
| **What events or problems might trigger this buyer to need this solution?** | * Organizations experiencing rapid growth realize their current fundraising tools cannot scale efficiently, leading to manual workarounds and lost opportunities. * Nonprofits facing revenue stagnation or donor churn recognize they need more personalized, data-driven engagement to boost giving and retention. * Teams struggling with disconnected systems find themselves spending excessive time on data reconciliation instead of fundraising and outreach. * Frustration with existing platforms, such as lack of innovation, unreliable customer support, or security breaches (e.g., Blackbaud data breach), pushes nonprofits to seek a better alternative. * Concerns over reduced federal funding are driving nonprofits to prioritize individual giving strategies, requiring better tools for donor engagement and retention. |
| **When the buyer starts searching, what are they looking for?** | Keyword analysis was done based Bonterra web traffic, as well as the following competitors:   * Blackbaud Raiser’s Edge NXT * Bloomerang * Virtuous * Neon One * DonorPerfect * Fundraise Up * Classy   Brand keywords were excluded and we typically look for non-brand keywords that have some consensus between at least 2 or 3 of the above cited brands. Also, keywords should have some meaningful volume (demand) and at least one of the above brands should be ranking in traffic-driving positions (rank 1-10) as a signal of relevance. The following is a shortlist of the most important keywords (with monthly volume):   * nonprofit CRM (880) * marketing for nonprofits (480) * best fundraising platforms (390) * donor CRM (260) * nonprofit donor management (210) * online fundraising platforms for nonprofits (170) * email marketing nonprofit (140)   The above list will be expanded into keywords with more specificity for the sake of content development. [See here](https://docs.google.com/spreadsheets/d/1rQnh6x76KGjWyn7L5D_TCbd577KrPI4gQqwa2P_BCbI/edit?gid=1627226251#gid=1627226251) for a more extensive list of keywords that users search for. |
| **What are the major barriers that are top of mind for the buyer as they research potential solutions?** | The biggest barrier for these buyers is the belief that nothing better exists. Buyers will quickly acknowledge what they have today is broken, but need compelling evidence that alternatives are better. The benefits need to outweigh the pain of change (data migration, time to learn new systems, building new workflows and processes).   * We have a large amount of donor data across many systems. How can we migrate and clean up this data with a new platform? How long will it take, and what kind of support do you provide? * Support and partnership are huge weaknesses of our current platform. How do you prioritize support and partnership? * We have a large variety of tech abilities on our team, including team members that struggle to use basic technology. How user-friendly is your platform and how do you balance that with sophisticated features? What does onboarding and training look like? * Multiple stakeholders have different priorities (Digital Director wants innovation, Data/Operations Director needs stability). How do we bring everyone together to agree on the right platform? * We need to track and increase our donors’ lifetime value. How does your system enable us to do that? |

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| **Three Messages to Remember**  *What are the three most important selling messages for any rep to remember about this offer?* | |
| **1** | The only nonprofit CRM with built-in marketing automation and AI-powered fundraising – EveryAction is built to deliver personalization at scale and increase donor lifetime value. |
| **2** | It’s AI models recommend the best way to engage donors at every stage of their lifecycle, ensuring nonprofits take the right actions to maximize giving. |
| **3** | It’s multichannel approach empowers nonprofits to deliver those personalized interactions – boosting engagement across email, mobile messaging, social media, and direct mail. |

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| **Positioning Canvas** | | | |
| **Product name and one line description**  EveryAction – the only marketing automation and AI-powered fundraising platform built on a nonprofit CRM. | | | |
| **Market category (and subcategory)**  Market category: Nonprofit fundraising and marketing software  Subcategory: Gift management, email marketing, mobile messaging, online donation forms, AI fundraising | | | |
| **Competitive alternatives.** What would customers use if this solution did not exist? | **Unique attributes.** What features/capabilities does this solution have that the alternatives do not | **Value.** What value do those attributes enable for customers? | **Who cares a lot.** What are the characteristics of customers that care a lot about what this solution delivers? |
| **Point solutions** for marketing automation and online fundraising: Mailchimp, Constant Contact, Engaging Networks, Fundraise Up, Classy  **All-in-one CRMs** with basic email marketing and online forms: Blackbaud, Bloomerang, NeonOne, Virtuous | 1. **Marketing automation, online fundraising and nonprofit CRM capabilities in a single product:** Run your online fundraising from the same tool that has all the insights about all your donors' interactions across their full donor journey.  2. **AI-powered personalization:** Leverage that unified insight to deliver dynamic personalization unique to each donor and touchpoint on their journey.  3. **Multi-channel outreach:** Activate those personalized experiences across online giving, email, mobile and social. | **Increased donor lifetime value:** Deeper personalization leads to more engaged supporters, higher retention, and larger donations over time.  **Time and cost savings:** No more manual data syncing or paying for third-party integrations — freeing up staff time and budget for mission-driven efforts. | * 501c3/c4 with 5,000 to 50,000 donors * Revenue of $3-15M (primarily from individuals, gifts could range from $5 to multi-millions) * Multi-channel fundraising program with at least three distinct channels |

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| **Offer Business Value**  *Why should the buyer be excited about this offer?* | |
| **What is the most important value driver for this offer?** | EveryAction ensures full donor journey personalization, powered by AI-driven fundraising and automation—all built into a single CRM, reducing the need for external tools for these critical functions.  This solves the fundamental problem nonprofits struggle with – having to choose between “all-in-one" CRMs that miss table stakes functionality or purchasing multiple specialized solutions that create issues with duplicate records, inconsistent data and still miss vital context about the full donor journey. |
| **Why is it Important?** | The cost of doing nothing is donor disengagement and fundraising stagnation.   * Donor expectations have shifted – They now expect hyper-personalized engagement. Generic outreach leads to lower response rates (45% drop year-over-year). * Multi-channel engagement is crucial – Organizations relying only on email experience 64% lower donor retention. * Acquiring new donors is expensive – It costs 5x more to acquire a new donor than retaining an existing donor. Without personalization, organizations miss out on donor lifetime value. |
| **What business benefits should the buyer expect?** | * Increased donor lifetime value – AI-driven personalization leads to higher retention and larger donations over time. * Time and cost savings – Eliminates the need for manual data syncing and third-party integrations, allowing staff to focus on mission-driven efforts. * Higher fundraising revenue – Organizations using EveryAction’s AI-Optimized Ask see a 432% increase in dollars raised per form load. |
| **Why is EveryAction the right team to help you with this?** | EveryAction is a trusted leader in nonprofit software, designed to help organizations of all sizes build stronger donor relationships and drive meaningful impact.   * **Proven Scalability:** Supports over $18 billion in annual giving, manages 20 million+ profiled supporters, and handles 640 million daily transactions, making it the ideal solution for organizations with growing needs. * **AI-powered Fundraising Across All Channels:** Leverages built-in tools for email, mobile messaging, social media, and direct mail with built-in AI-driven models that drive increased donor retention, larger gifts, and higher donor lifetime value. * **For the Greatest Good:** EveryAction is more than a technology provider — we’re a force for systemic change in philanthropy. As part of Bonterra, we’re working to increase U.S. charitable giving from 2.5% to 3% of GDP by 2033, empowering nonprofits to unlock more generosity, mobilize supporters, and maximize impact. |
| **What are some examples?** | One of the clearest ways to illustrate this impact is through EveryAction’s Optimized Ask capability, which dynamically adjusts ask amounts based on each donor’s giving history.     * Standalone donation tools use one-size-fits-all ask amounts — relying on basic factors like device type and location. This approach results in a modest 10-15% increase in giving, leaving donor potential untapped.      * EveryAction’s AI-powered Optimized Ask analyzes each donor’s full engagement history to maximize generosity. The result? Organizations using EveryAction see an average 432% increase in dollars raised per form load — unlocking larger gifts, higher donor retention and increased fundraising revenue.   **---**  **WhyHunger**  WhyHunger used EveryAction’s deep segmentation, automation, and analytics to personalize donor engagement at every stage. The result was more than just increased donations—it empowered them to expand their hunger relief programs, reaching more families than ever before.    Results:   * 218% increase in individual giving * 80% increase in sustainers     ---    **MRCA**  With EveryAction, MRCA identified and nurtured new donor relationships by tracking supporter actions and streamlining donor outreach. This growth enabled MRCA to significantly expand their community programs and support more local initiatives.    “I love (EveryAction) because it is so powerful. It has saved me so much time, and we’re raising money that we never considered we would.... The tool really paid for itself in the first few weeks that we had it.” – MRCA    Results:   * 300% increase in first-time donors, more than quadrupling their individual donor base * 350% growth in fundraising from individual donors |

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| **Offer Competitive Positioning**  *What are the 2-3 competitive positioning messages, and which types of competitors do they apply to?* | |
| **When you encounter these competitors…** | **Focus on this differentiated message…** |
| **All-in-one CRMs** with basic email marketing and online forms  *Such as: Blackbaud, Bloomerang, NeonOne* | **“EveryAction is more than a nonprofit CRM. We built AI fundraising and marketing automation into the CRM — so you don’t have to pay for and integrate multiple tools.”**  Nonprofits that continue using traditional all-in-one CRMs without AI fundraising and automation are forced into costly manual processes and donor attrition due to generic outreach.  While these platforms offer standard CRM capabilities and basic engagement tools, they lack the advanced personalization and automation nonprofits need. The result is costly manual processes and donor attrition due to generic outreach. EveryAction empowers nonprofits to deliver personalized donor journeys across all channels, boosting fundraising outcomes and donor lifetime value.  Specific features that deliver this differentiation:   |  |  | | --- | --- | | **Because of this feature** | **Our customers can do this** | | Advanced marketing automation tools | Streamline and personalize donor communications, saving time and increasing engagement. | | AI-powered Optimized Ask amounts | Automatically suggest personalized donation amounts based on donor history, driving larger contributions. | | Multi-channel communication (email, mobile messaging, social media, direct mail) | Reach supporters on their preferred platforms, leading to higher retention and stronger donor relationships. | | Donation forms with FastAction | Securely save donor contact and payment details, enabling one-click donations — boosting conversion rates and streamlining engagement for organizations. | |
| **Standalone email marketing tools**  *Such as: Constant Contact, Mailchimp, Engaging Networks* | **“EveryAction combines advanced email marketing with comprehensive CRM, fundraising, and AI-powered insights — everything nonprofits need in one platform.”**  Standalone email marketing tools lack the integrated donor data and fundraising intelligence needed for true personalized outreach. Nonprofits piecing together point solutions struggle with inefficiencies — spending more time on donor management and missing out on retention opportunities due to siloed data. EveryAction connects marketing directly to donor engagement data, enabling organizations to craft targeted campaigns that drive stronger relationships and increased giving while manual work.  Specific features that deliver this differentiation:   |  |  | | --- | --- | | **Because of this feature** | **Our customers can do this** | | Built-in nonprofit CRM and donor history tracking | Personalize communications based on donor behavior and past interactions, increasing response rates. | | Advanced segmentation and personalized appeals | Send tailored messages to specific donor groups, boosting engagement and donations. | | Multi-channel communication (email, mobile messaging, social media, direct mail) | Expand their reach beyond email, engaging supporters through text, social media, and direct mail for stronger connections. | |
| **Standalone online donation tools**  *Such as: Fundraise Up, Classy* | **“EveryAction goes beyond transactions by connecting donations to a broader engagement strategy through AI-driven personalization and multi-channel communication.”**  While standalone tools focus on transactions, EveryAction focused on building relationships with donors. By connecting donation data with broader engagement efforts, EveryAction allows nonprofits to scale personalized outreach and multi-channel communication. The result is increased fundraising revenue.  Specific features that deliver this differentiation:   |  |  | | --- | --- | | **Because of this feature** | **Our customers can do this** | | Built-in nonprofit CRM and donor history tracking | Simplify operations by eliminating the need for custom integrations, allowing teams to easily manage donor data, track engagement history, and strengthen relationships — all in one platform. | | AI-powered Optimized Ask amounts | Move beyond generic donation requests by using AI to analyze each donor’s full giving and engagement history, leading to smarter, personalized asks that maximize generosity and increase gift sizes. | | Donation forms with FastAction | Securely save donor contact and payment details, enabling one-click donations — boosting conversion rates and streamlining engagement for organizations. | | Built-in marketing automation | Build donor loyalty through automated workflows, such as welcome series, moves management, and targeted upgrade campaigns— keeping supporters engaged and driving increased retention. | |
| **Up-and-coming nonprofit CRM**  *Such as: Virtuous* | **“EveryAction is the robust, scalable solution designed for nonprofits seeking advanced, integrated tools to elevate their fundraising and donor engagement strategies.”**  Unlike Virtuous, which offers a suite of donor management and marketing tools, EveryAction goes further by combining AI-powered fundraising intelligence, sophisticated marketing automation, and comprehensive multi-channel engagement—all built into a unified nonprofit CRM. This empowers organizations to deepen donor relationships, streamline operations, and maximize fundraising outcomes, all while scaling effortlessly as their needs grow.  Specific features that deliver this differentiation:   |  |  | | --- | --- | | **Because of this feature** | **Our customers can do this** | | Proven scalability for expanding organizations | Confidently scale their operations and outreach efforts, ensuring consistent and personalized communication as their donor base grows. | | Advanced AI-powered fundraising intelligence | I Develop targeted fundraising strategies, optimize ask amounts, and enhance donor retention efforts, leading to increased contributions and sustained support. | | Comprehensive multi-channel marketing automation | Execute cohesive and personalized campaigns that resonate with diverse donor segments, improving engagement rates and fostering deeper connections. | | Donation forms with FastAction | Securely save donor contact and payment details, enabling one-click donations — boosting conversion rates and streamlining engagement for organizations. | |

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| **Offer Pain, Feature, Benefit Map**  *How can a sales, support or success rep uncover pain and map pain to the appropriate features and benefits?* | | | | |
|  | **Disconnected Donor Experience** | **Low Donor Retention** | **Manual Processes** | **Limited Scalability** |
| **Pain Point** | Nonprofits often juggle multiple tools for donor management, fundraising, and marketing — leading to fragmented data and inconsistent outreach.  According to Salesforce, 76% of donors expect personalized communication, yet disconnected systems make it difficult to deliver. This weakens donor relationships, reduces engagement, and limits fundraising potential. | The average donor retention rate for nonprofits is just 45% (AFP Fundraising Effectiveness Project), meaning that more than half of donors give only once. This results from a lack of personalized, timely engagement that builds loyalty and encourages repeat contributions.  Since retaining existing donors is 5x more cost-effective than acquiring new ones, low retention rates directly diminish fundraising effectiveness and long-term revenue. | Nonprofits spend an average of 20% of their time on administrative tasks due to manual processes and disconnected systems (NTEN Digital Adoption Report).  Not only does this limit operational efficiency, but also diverts resources from mission-critical work like fundraising strategy and donor engagement, slowing organizational growth and diminishing impact. | As nonprofits grow, managing larger volumes of donor data and increasingly complex engagement strategies becomes challenging.  According to the Salesforce Nonprofit Trends Report, 40% of nonprofits cite technology limitations as a barrier to scaling operations. Without scalable systems, organizations risk bottlenecks that hinder fundraising capacity, limit donor engagement, and reduce long-term impact. |
| **Relevant Personas** | * **Decision Makers:** Executive Director * **Champions:** Data/Operations Director | * **Decision Makers:** Executive Director * **Champions:** Digital Director | * **Decision Makers:** Executive Director * **Champions:** Data/Operations Director | * **Decision Makers:** Executive Director * **Champions:** Digital Director |
| **Feature** | * **Unified Fundraising & Marketing Platform:** Marketing automation, online fundraising, and nonprofit CRM all in one place—no need for complex integrations. * **Reporting Across Online and Offline Gifts:** Includes major gift and pledge tracking for a complete fundraising picture. * **User-Friendly Interface:** Drag-and-drop reporting and pre-built workflows ensure easy adoption for all skill levels. | * **AI-powered Personalization:** Hyper-personalized outreach at every stage of the donor journey to increase retention and gift sizes. * **Advanced List Segmentation:** Target donors based on giving and engagement history for more relevant outreach. * **Optimized Ask:** Dynamically personalizes donation amounts by analyzing donor history to encourage larger gifts. | * **User-Friendly Interface:** Drag-and-drop reporting and pre-built workflows for ease of use. * **Automated Workflows:** Engage donors through post-donation follow-ups, welcome series, upgrades, and moves management. * **Centralized Multi-Channel Communications:** Manage all donor outreach in one platform for improved tracking and optimization. | * **Proven Scalability:** Supports 20M+ profiled supporters, 640M daily transactions, and over $18B in annual giving. * **Built-in Predictive AI:** Identifies major donor prospects, lapsed donors, and sustainers to focus engagement efforts effectively. * **Automated Workflows:** Scale fundraising efforts with automated donor journeys, including welcome series, upgrades, and moves management. |
| **Benefit** | Customers gain a complete view of their supporters, leading to more consistent and personalized donor engagement because:   * They eliminate data silos by centralizing donor information in one platform. * They improve coordination across channels, leading to stronger, more effective outreach. * Teams spend less time managing data and more time building meaningful donor relationships. | Customers experience increased donor retention and lifetime value because:   * AI-driven insights help target the right donors with the right message at the right time. * Personalized engagement strategies foster loyalty and encourage repeat giving. * Smart donation requests lead to larger contributions from engaged supporters. | Customers increase operational efficiency and focus on mission-driven growth because:   * Reporting is consolidated to one platform, reducing manual data entry and/or integration maintenance. * Pre-built workflows enable quicker campaign execution and donor follow-ups. * Centralized communications streamline engagement, saving staff time and resources. | Customers scale their fundraising and engagement efforts efficiently because:   * The platform supports large donor databases and high transaction volumes without compromising personalization. * Predictive AI helps focus on high-value donors and re-engage lapsed supporters. * Automated workflows streamline donor engagement, allowing organizations to nurture relationships at scale. |
| **Questions to Draw out Pain** | * Are you using multiple systems to manage donor engagement and fundraising? * How difficult is it for your team to access a full picture of your donors’ interactions? * Are gaps in donor communication impacting your fundraising results? | * What’s your current donor retention rate, and are you satisfied with it? * How personalized are your outreach strategies for different donor segments? * Are you able to identify and re-engage lapsed donors effectively? | * How much time does your team spend on manual tasks each week? * Are disconnected systems slowing down your engagement efforts? * How easily can staff of all skill levels use your current tools? | * Is your current system capable of supporting your organization's growth? * How well does your platform handle increasing donor data and engagement complexity? * Are you confident your tools can support expanded fundraising campaigns and higher donation volumes? |

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| **Offer Objection Handling**  *What do we believe are the top value-based objections and how should we answer them?* | |
| **Our current system is deeply embedded in our workflow. Why should we switch?** | EveryAction simplifies your operations by combining fundraising, marketing automation, and donor management into a single platform. This eliminates the need for multiple integrations, reduces administrative overhead, and streamlines workflows — empowering your team to focus on driving donor engagement and increasing fundraising results. |
| **Our team isn’t tech-savvy. Will your platform be too difficult to use?** | EveryAction is designed with ease of use in mind. Our user-friendly interface features drag-and-drop reporting and pre-built workflows, making it accessible for all skill levels. Plus, we offer robust training resources and dedicated support to help your team get up to speed quickly and confidently. |
| **Switching platforms** **sounds too disruptive. How can you make this transition easier for us?** | We understand that transitioning platforms can feel overwhelming. That’s why EveryAction offers comprehensive onboarding and data migration support. Our dedicated implementation team ensures a smooth transition, with most organizations fully operational within just a few weeks. You’ll also have access to ongoing support to help your team adapt and thrive.  Internal *Resources:*   * *The cost of implementation given a specific scenario can be calculated within the F&E Pro Implementation SKU in Salesforce. The price will range from $12K-$50K* * [*2024\_Fundraising PRO Implementation SOW.docx*](https://bonterratech-my.sharepoint.com/:w:/r/personal/kari_zavolta_bonterratech_com/Documents/2024_PS%20SOWs/Implementation%20SOWs%20-%20Final%20Drafts/2024_Fundraising%20PRO%20Implementation%20SOW.docx?d=w0ada93a31d2145feb70d8badf9a30838&csf=1&web=1&e=2gK5wE) |
| **Migrating donor data from multiple systems seems complicated. How do you handle data migration?** | EveryAction provides expert data migration services to ensure all your donor data is consolidated seamlessly. Our team works closely with you to ensure a smooth transition, minimizing downtime and preserving the integrity of your data — so you can focus on donor engagement from day one. |
| **What other resources are available for customers?** | EveryAction has a dedicated training, onboarding and digital learning team who have crafted excellent resources for new customers to learn EveryAction and for existing customers to level-up their knowledge:   * **In-app onboarding checklists**   Designed to focus on the features you should master first, the checklists include links to training, short videos, product walk-throughs, and articles to help you finish all set up steps within a few weeks.   * **Weekly training**   Our robust training program covers basic and advanced topics helping customers learn the system and the features that they can benefit from the most. Each live training session includes extensive Q&A so you always leave a session with a complete picture of feature functionality. Can't attend the live sessions? No problem. Our trainings are recorded and available to watch anytime.   * **Help center articles**   Our help center is the best (and quickest) place to find answers to those "How do I....?" questions. Articles include detailed descriptions and images plus short videos to help you master a feature or quickly get the answer to a question.   * **Ongoing fundraising and product learning**   Regular customer events include Ask the Expert sessions, Best Practice Coaching Webinars, and Product Update webinars. These live events feature a panel of product and fundraising experts and allow you to connect with other nonprofits who are using Network for Good to fundraise in creative ways |
| **Everyone is saying they are using “AI” but none of it has proved very helpful for us yet. How exactly will your AI help me?** | Most AI solutions optimize individual transactions — predicting when a donor might give or how much to ask. But fundraising isn’t just about a single gift; it’s about maximizing lifetime donor value.  That’s where we’re different. Our predictive AI models don’t just analyze transactions—they optimize the entire donor journey by helping you:   * Retain supporters * Uncover sustainers * Target donors primed to upgrade * Identify major donors * Reactivate lapsed donors   Take our Optimized Ask feature: instead of using static rules, our AI dynamically adjusts donation requests in real-time, driving an average 432% increase in dollars raised per form load. The result is AI that helps you strategically grow donor relationships and revenue at every stage. |
| **Do other companies have access to my supporters?** | Data privacy is a top priority for Bonterra. We do not share your supporters’ information with other customers, nor do we communicate directly with your supporters on behalf of others.  Our proprietary FastAction technology is designed to enhance supporter engagement. When a supporter signs up for a FastAction profile, they can more easily interact with your organization and other Bonterra customers — always on their own terms. Think of it like Apple Pay: it simplifies transactions for both users and merchants while maintaining the highest privacy standards.  Over time, this means that as more supporters (currently over **20 million and counting**) use FastAction, it becomes easier for them to engage with your organization—boosting supporter value and fostering deeper connections. |
| **I saw that this includes mobile messaging. Is that billed separately or included in the cost?** | Mobile messaging is included! When you purchase Fundraising and Engagement Pro it comes with included usage allotments for mobile messaging, virtual phone banking dials and click-to-call advocacy. We’ve set those usage allotments based on what we’ve found to be more than enough for our current customer base given their database size. If you go over that usage amount you will incur an overage fee. The allotments and usage fees are as follows:   |  |  |  |  | | --- | --- | --- | --- | | **Contact Tier** | **Message Credits (Annual)** | **Click-to-Call Minutes (Annual)** | **VPB Connect Minutes (Annual)** | | **5,000** | 24,000 | 3,000 | 3,000 | | **10,000** | 30,000 | 5,000 | 5,000 | | **15,000** | 40,000 | 6,000 | 6,000 | | **20,000** | 50,000 | 8,000 | 8,000 | | **25,000** | 60,000 | 10,000 | 10,000 | | **50,000** | 100,000 | 15,000 | 15,000 | | **100,000** | 120,000 | 24,000 | 24,000 | | **250,000** | 240,000 | 45,000 | 45,000 | | **500,000** | 480,000 | 90,000 | 90,000 | | **1,000,000** | 800,000 | 180,000 | 180,000 | | **2,000,000** | 1,200,000 | 360,000 | 240,000 | | **>2,000,000** | Add-on SKU for Additional Credits | Custom | Custom |   Usage Overages  Usage limits are applied by multiplying the annual usage allotment to the total number of years of the contract.  Usage overages will be charged at the following rates:  \*SMS/MMS: $65 per 1,000 message credits  \*Click-to-call: $13 per 100 minutes |
| **We need volunteer management, giving days, or peer-to-peer fundraising. Does EveryAction include this functionality?** | EveryAction is great for donor management and AI-powered fundraising, but it lacks those features. That’s where Bonterra’s Fundraising and Engagement Pro might the better fit for you:   * All-in-One Solution – Includes EveryAction plus Mobilize for volunteer management and DonorDrive for peer-to-peer fundraising. * Seamless Supporter Experience – Unified engagement across donations, events, and volunteering. * Simplified Operations – One integrated platform, no data silos or extra admin work.   Many customers start with EveryAction but later add additional platforms — Pro eliminates that need from day one. Pro also provides an economic option for combining multiple products, reducing the cost of standalone products by more than 50%.   |  |  |  | | --- | --- | --- | | **Contacts** | **EveryAction** | **Pro** | | **Up to 1,000** | N/A | N/A | | **Up to 5,000** | $5,000 | $5,500 | | **Up to 10,000** | $7,000 | $7,900 | | **Up to 15,000** | $9,500 | $10,500 | | **Up to 20,000** | $11,500 | $13,000 | | **Up to 25,000** | $14,000 | $15,800 | | **Up to 50,000** | $21,000 | $23,600 | | **Up to 100,000** | $28,000 | $31,500 | | **Up to 250,000** | $55,000 | $68,300 | | **Up to 500,000** | $100,000 | $126,000 | | **Up to 1,000,000** | $180,000 | $200,000 | | **Up to 2,000,000** | $280,000 | $360,000 | |
| **It seems like the for-profit CRM market is already much better at supporting one consumer experience. Why wouldn’t we just use one of those systems?** | First, we agree! A big part of our product strategy is driven by the fact that we believe this should not be the case: there shouldn’t be such a gap between the for-profit and nonprofit software market.  Second, the reality is that for profit systems simply are not built on a foundation that considers the most important use cases of nonprofit. A few of those are:   * Individual monetary contribution management * A complicated mix of one time and recurring engagement methods * Grants management * Advocacy management * Event management   For profit software typically either doesn’t support these use cases or has to be heavily customized to support them. Over time, heavy customization comes with significant risk to technical performance and the supporter experience. |