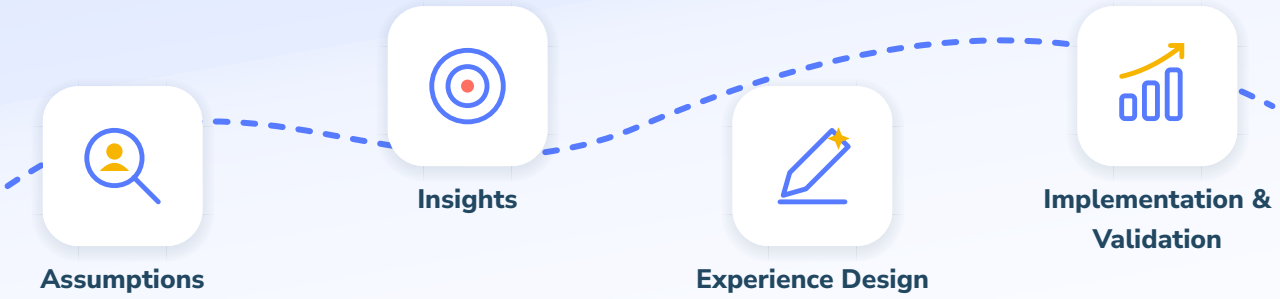
Real Path.

Supporter Experience Workbook

Your First Supporter Experience Project

A practical workbook to challenge an assumption, understand your supporters, and improve one thing.



Start small.
Improve one thing you can measure.

BEFORE YOU BEGIN

You don't need the full strategy to get started

Supporter experience can feel like a big, organization-wide undertaking. It doesn't have to start that way. This workbook helps you plan one focused project that you can investigate, influence, and learn from,.

1



Choose one experience

Narrow your focus to one group of supporters at one moment.

2



Name the assumption

Separate what you believe from what you know, and decide what to learn.

3



Design one improvement

Turn what you learn into one specific change.

4



Measure and decide ownership

Decide how you'll know it worked and who will carry it forward.

Who to work through it with

Ideally, one or two colleagues who touch the experience you choose, especially someone outside your own team. Supporters don't see your org chart; they see one organization.

How long it takes

About 60 to 90 minutes for a first pass. Steps 2 and 3 will continue after you've heard from supporters. Expect to come back to this workbook.

There is a completed example on page 7 if you'd like to see what a finished plan can look like before you start.

1 STEP ONE

Choose one experience



Pick one group of supporters at one specific moment. The narrower your focus, the easier it is to learn something useful and act on it.

Which supporters are we focusing on?

Be specific: “first-time monthly donors” rather than “donors”

At what moment, or in what situation?

What are they trying to do, or hoping to get from us?

Why do we suspect this experience could be better?

What have you noticed, heard, or seen in your data?

Why is this worth looking at now?

Need a starting point? A few examples

- A volunteer's first experience after signing up
- What happens after someone takes an advocacy action
- A new donor's first month
- Whether a potential program participant can tell if an opportunity is right for them

GUARDRAIL

Choose something small enough to investigate and influence. “Improve engagement” or “map every supporter journey” is too big for a first project.

2 STEP TWO

Name the assumption

Separate what you believe from what you know, decide what to learn, and talk to supporters.



What we currently assume	What we actually know	What we need to learn
"We think supporters..."	"Our evidence is..."	"We need to understand..."

Who could help us understand this?

Which supporters, and how could we reach them?

What could we ask, observe, or review?

e.g. a handful of short conversations, a look at what people actually do, reading open-ended feedback

What is the smallest useful thing we could learn first?

3 STEP THREE

Design one improvement



Once you've heard from supporters, turn what you learned into one specific change. Not a new program. One change.

We learned that...

This matters because...

We will change...

We expect this will help supporters...

Which supporter need does this address?

Check any that apply.

- ☐ **Respect my boundaries**
  Am I in control of how and how often I hear from you?
- ☐ **Reflect my values**
  Does this feel connected to why I care?
- ☐ **Recognise my motivation**
  Do you understand why I'm here?
- ☐ **Show me impact**
  Can I see what my support made possible?

CHECK YOURSELF

Are we making this easier or more meaningful for supporters, or simply more convenient for our organization?

4 STEP FOUR

Measure it and decide ownership



Keep measurement simple. You're looking for a signal that the experience improved, and whether that contributed to what your organization needs.

Experience signal

Did the experience improve for supporters?

Organizational outcome

Did that contribute to the result we hoped for?

What will we compare?

☐ Before and after the change ☐ Two different approaches ☐ Other: _____

Who needs to be involved?

Think across teams: communications, programs, volunteers, fundraising, data

Next step

Owner

Review date

KEEP IT LIGHT

One good measure you actually track beats a dashboard nobody looks at. You can build a fuller framework once you've shown this works.

A WORKED EXAMPLE

What a first project can look like

This example comes from a Real Path case study. It shows how a small, specific change can come from challenging one assumption.

1 Choose one experience

Young people who are interested in one of our programs, at the moment they are deciding whether to apply.

2 Name the assumption

We assumed: interested young people feel welcome to apply.
We learned: they need clear, explicit information about prerequisites before they feel able to apply.

3 Design one improvement

Make eligibility and prerequisites explicit and easy to find in the application experience.

4 Measure and decide ownership

Experience signal: applicants say they understood whether they were eligible. Outcome: more completed applications from eligible young people. Compare before and after. Program and communications staff review together after one intake cycle.

Why this works as a first project

It focuses on one group at one moment. It started by questioning an assumption rather than adding a new tactic. The change is small and doesn't require new technology. And it reaches beyond fundraising: supporter experience includes everyone who chooses to engage with you.

BRING IT TOGETHER

Our first project on a page

Share this with your colleagues or leadership to get agreement on where you're starting.

Supporters and moment

The assumption we're testing

How we'll learn from supporters

The improvement we'll make

How we'll know it worked

Owner and review date

Need help moving from assumptions to insight?

Real Path helps nonprofits understand their supporters and turn insights into better experiences. If you're unsure what to investigate, how to hear from supporters, or how to bring colleagues along, let's talk.

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