

SEPTEMBER 12



SESSION 3



# Operationalizing Your 7-Figure Strategy

How to identify and research capacity, moves management, post-donation stewardship, repeat giving & the CRM playbook.

DAY 03

FRIDAY

# Building a Donor Pipeline for Growth

Look In • Look Up • Look Out

# Identifying New Donors – Top Problem?



# Look In, Look Up, Look Out



## Look In

Maximize existing  
donor potential first



## Look Up

Leverage board and  
leadership connections



## Look Out

Strategic acquisition  
of new donors

# Look In

Donor Growth  $\neq$  Revenue Growth

# Look In

## **Spotting High-Capacity Donors**

### **The 3-I Model**

Capacity + Inclination + Connection  
(Income/Interest/Influence)

All three must align for successful  
major gift prospects

# Look In



## Wealth Signals to Watch:

- Real estate ownership
- Business Ownership
- Philanthropy Elsewhere
- Public Stockholdings & SEC Filings, IPO Events (EDGAR)

## Essential Tools

- Wealth Screening
- Career Intelligence
- AI Solutions
- Researcher



# Look In

## Donor Criteria Grouping:

- Longevity
- Recency
- Frequency
- Number of Gifts
- Gift Amounts
- Cumulative Giving
- Event or Volunteer Attendance
- Giving to Different Offers/Products

*Pro Tip: Build a "Top 25" upgrade list annually and review quarterly with your team*

# Look Up

## Boards & Leadership as Your Secret Weapon

### Warm Introductions

Leverage Board/Exec credibility for authentic connections. Board members open doors that cold outreach cannot.

### Equip with Simple Scripts

Provide conversation starters and talking points. Make it easy for board members to represent your mission confidently.

### Board Expectations

Establish clear expectations for board member fundraising participation as part of their commitment.

***Critical Question:** How many of your board members made at least one donor introduction last year?*

# Look Out

ACQUISITION STRATEGY

## 1. Lapsed Donors

Start With The Most Recently Lapsed Donors and Work Your Way Back

Survey Lapsed Donors About Why They No Longer Give

Do Your Research On What Inspired Their First Gift



### Look In

Maximize existing donor potential first



### Look Up

Leverage board and leadership connections



### Look Out

Strategic acquisition of new donors

# Look Out

## 2. Donor-Led Introductions

### Ambassador Major Donors

Empower a few existing major donors to become connectors, not just givers. Provide them with toolkits and simple asks (“Could you connect me to one family?”).

# Look Out

## 3. Experiential Invitations

- Host intimate dinners where one or two of your current major donors invite peers.  
The peer endorsement is key.
- Vision Trips / Immersive Experiences - Invite prospective major donors to see the work firsthand (field visits, or even high-quality virtual immersion). These experiences often lead to transformational gifts.
- Behind-the-Scenes Access - Give prospects access to your founder/CEO, or to unique insider insights they can't get elsewhere. "Raising Generous Kids"

# Look Out

## 4. Thought Leadership & Positioning

- Exclusive Briefings - Offer quarterly “State Of The Cause” reports for high-capacity prospects, positioned like an investor update.
- Media & Visibility - Place your leadership or mission in media outlets or on stages to establish credibility.
- Cause-Specific Expertise - Publish white-papers or insights that position your org as the thought-leader and credible solution for the cause.

# Look Out

**Major Donor Acquisition Is Still Relationship-Driven.**

“Look Out” doesn’t mean cold acquisition, it’s building pathways into new high-net-worth networks you don’t yet touch.

# The Order Matters

Focus on **In** → **Up** → **Out** progression.

Only invest in acquisition once you've maximized internal opportunities.

Low-cost acquisition strategies become most effective once your internal pipeline (In/Up) is optimized and producing consistent results.

# Building a Fundraising Team for Growth

## Team Structures by Organizational Size



### Small Organizations

Executive Director + part-time coordinator sharing stewardship responsibilities and donor communication

#### Everyone Fundraises

Board, Executive Director, and staff all play a role in donor relationships



### Mid-Size Organizations

Add dedicated Development Director focused on major gifts and donor strategy

#### Stewardship Culture

Include donor care responsibilities in all job descriptions



### Large Organizations

Specialized roles: Major Gift Officers, prospect researcher, and mid-level officers

#### Balanced Growth

Success = acquisition + retention + upgrades working together

# Moves Management - Your Practical Playbook



A "move" is any intentional step to deepen your relationship with a donor and advance them toward their next gift.



**Monthly Team Review:** Use a Moves Management Grid with donors as rows and stages as columns. Ask: "Who needs their next move?"

# Culture of Growth



## Everyone's a Fundraiser

Create a culture where all staff understand their role in donor relationships and mission advancement



## Celebrate Wins

Acknowledge successes, send quick thank-yous, and share impact stories across your organization



## Donor-Centric Language

Model language that puts donors and their impact at the center of every conversation (no internal jargon)

## Your 30-Day Challenge

What is **one action** you will take in the next 30 days to strengthen your donor pipeline?