

Donor management and stewardship

Automates donor segmentation, personalized stewardship communications, and impact reporting to strengthen donor relationships and increase retention rates.

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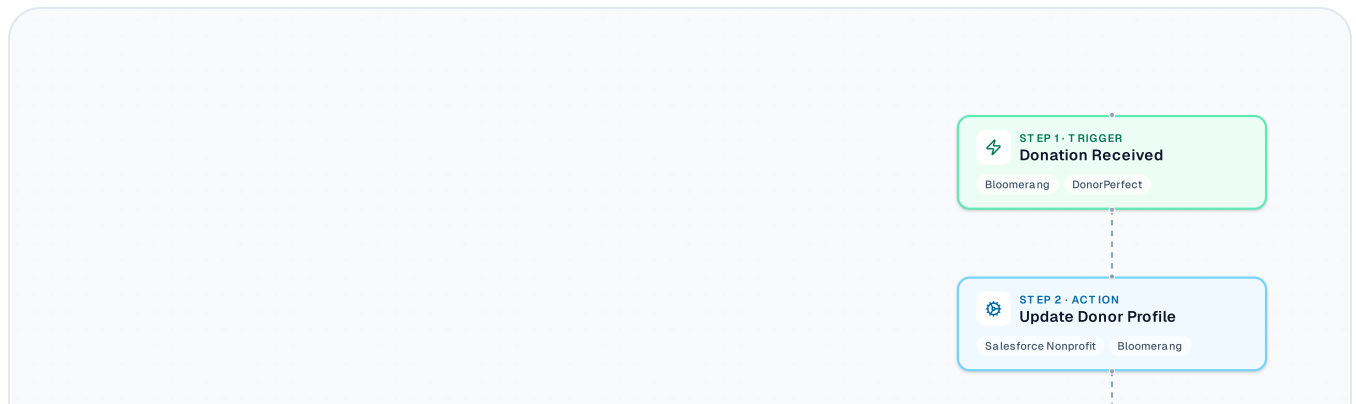


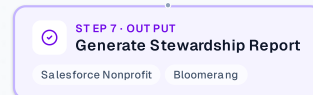
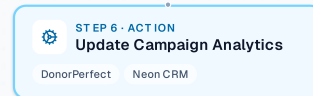
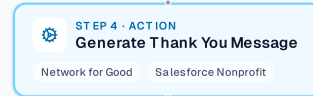
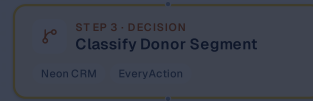
WORKFLOW TRIGGER

New donation is received through any fundraising channel

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

Donation Received

A new donation is recorded in the donor management system. The workflow captures donor information, gift amount, and campaign source.

Bloomerang

DonorPerfect

Update Donor Profile

The system automatically updates the donor's giving history, total lifetime value, and engagement score. Contact preferences and demographic data are refreshed.

Salesforce Nonprofit

Bloomerang

3

DECISION

Classify Donor Segment

The workflow evaluates gift amount, frequency, and history to categorize the donor as first-time, recurring, major gift, or lapsed reactivated. This determines the stewardship track.

Neon CRM

EveryAction

4

ACTION

Generate Thank You Message

A personalized thank you email or letter is automatically created based on donor segment, including specific impact metrics and suggested next engagement opportunities.

Network for Good

Salesforce Nonprofit

5

ACTION

Schedule Follow-up Touches

The system automatically schedules future stewardship activities like impact updates, event invitations, or solicitation calls based on the donor's segment and preferences.

6

 ACTION

Update Campaign Analytics

Gift data is aggregated into campaign performance dashboards and donor retention reports. ROI calculations and goal progress are automatically updated.

DonorPerfect

Neon CRM

7

 OUT PUT

Generate Stewardship Report

A comprehensive donor stewardship summary is created showing acknowledgment status, next touch points, and recommendations for relationship advancement.

Salesforce Nonprofit

Bloomerang



Outputs

- Personalized donor thank you communication
- Updated donor segmentation and scoring
- Scheduled follow-up stewardship activities



Key Metrics

- Donor retention rate
- Average time to acknowledgment
- Donor lifetime value growth
- Stewardship touch completion rate



Tools & Integrations

- Bloomerang
- Salesforce Nonprofit
- DonorPerfect
- Neon CRM
- EveryAction
- Network for Good

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