

Moving Up or Moving Out: A Relationship-Centric Approach to Portfolio Management and Handoffs



Presented by:



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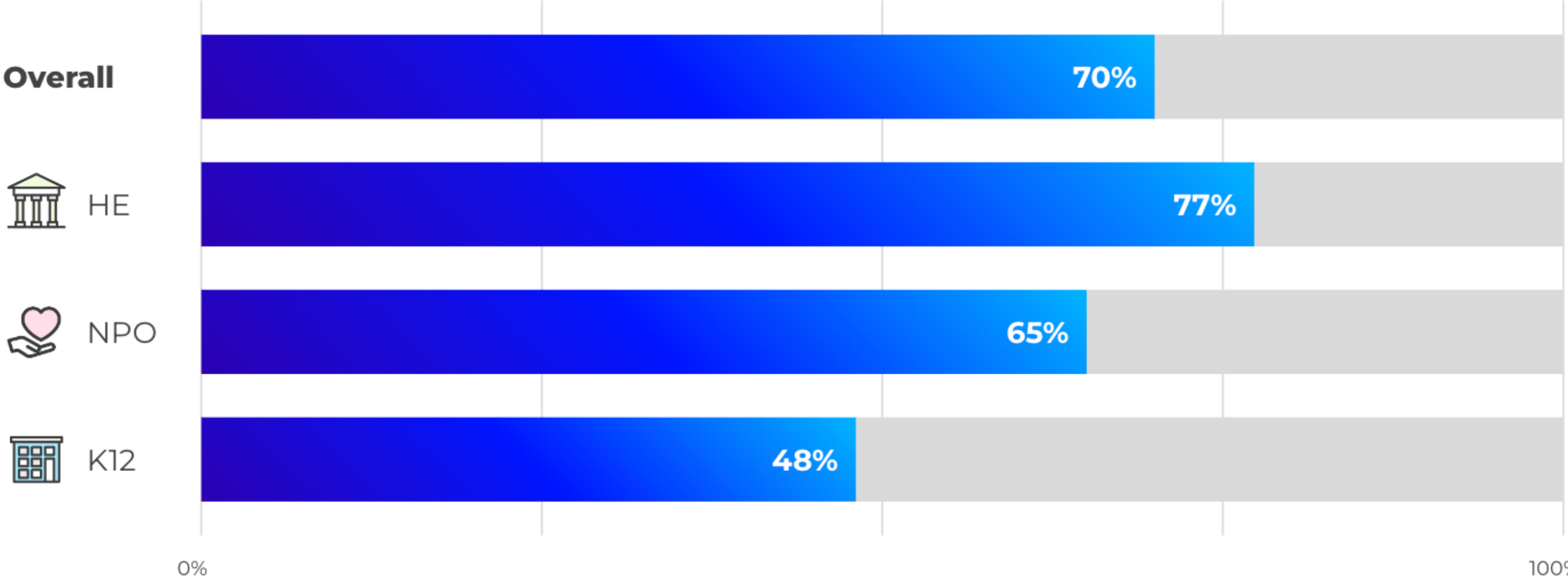
Today's Agenda

- ☑ Overview & key findings
- ☑ Consequences of ineffective internal processes
- ☑ Best practices for internal handoffs
- ☑ Ensuring relationship continuity
- ☑ Next steps

Key Findings

Pipeline building continues to be a top priority among institutions. From move donors through the process to retaining donors, pipeline growth should be a main goal for every organization.

Donor pipeline building is a top priority



Top KPIs

DOLLARS RAISED

DONORS RETENTION

**** UPGRADE OF DONORS**

QUALIFY FOR MAJOR GIFTS

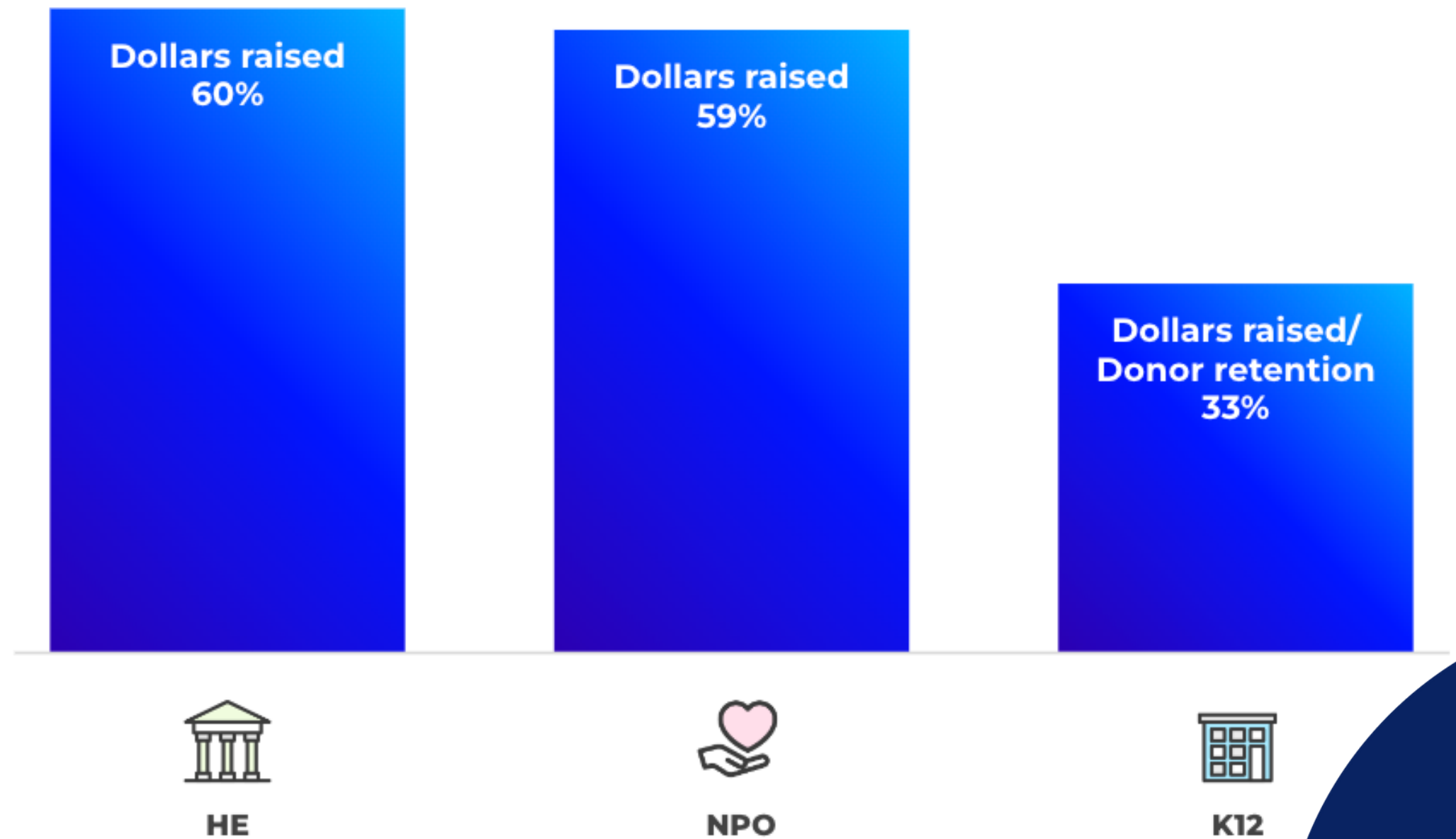
ENGAGEMENT LEVEL

TOTAL NUMBER OF DONATIONS

NUMBER OF CONTACTS PER YEAR

NUMBER OF VISITS PER YEAR

AVERAGE GIFT SIZE



Currently, what's your biggest **pain** point?

DONOR VISITS

BOARD OR ADMINISTRATION ENGAGEMENT

FINDING NEW DONORS

PERSONALIZED DONOR ENGAGEMENT

ANNUAL GIVING CAMPAIGNS

**LACK OF STAFFING
RESOURCES / TURNOVER**

BUILDING THE MID-LEVEL PIPELINE

ACCESS TO DONOR DATA OR BEHAVIOR

ACQUIRING MAJOR GIFT DONORS

DONOR STEWARDSHIP

DONOR RETENTION

Consequences

Without internal processes, there are consequences which will hurt the organization in the long run.

- ☑ Missed Opportunities for Donor Engagement
- ☑ Reduced Team Morale and Productivity
- ☑ Fragmented Donor Experience
- ☑ Decreased Donor Retention and Satisfaction
- ☑ Loss of Institutional Knowledge



This is fine.

[scott swim]

Best practices blog

Navigating donor transitions between gift officer portfolios is more than a strategic task. It's about nurturing and sustaining relationships built on trust and shared values.



**WHO LIKES
LOGGING
ACTIONS?**

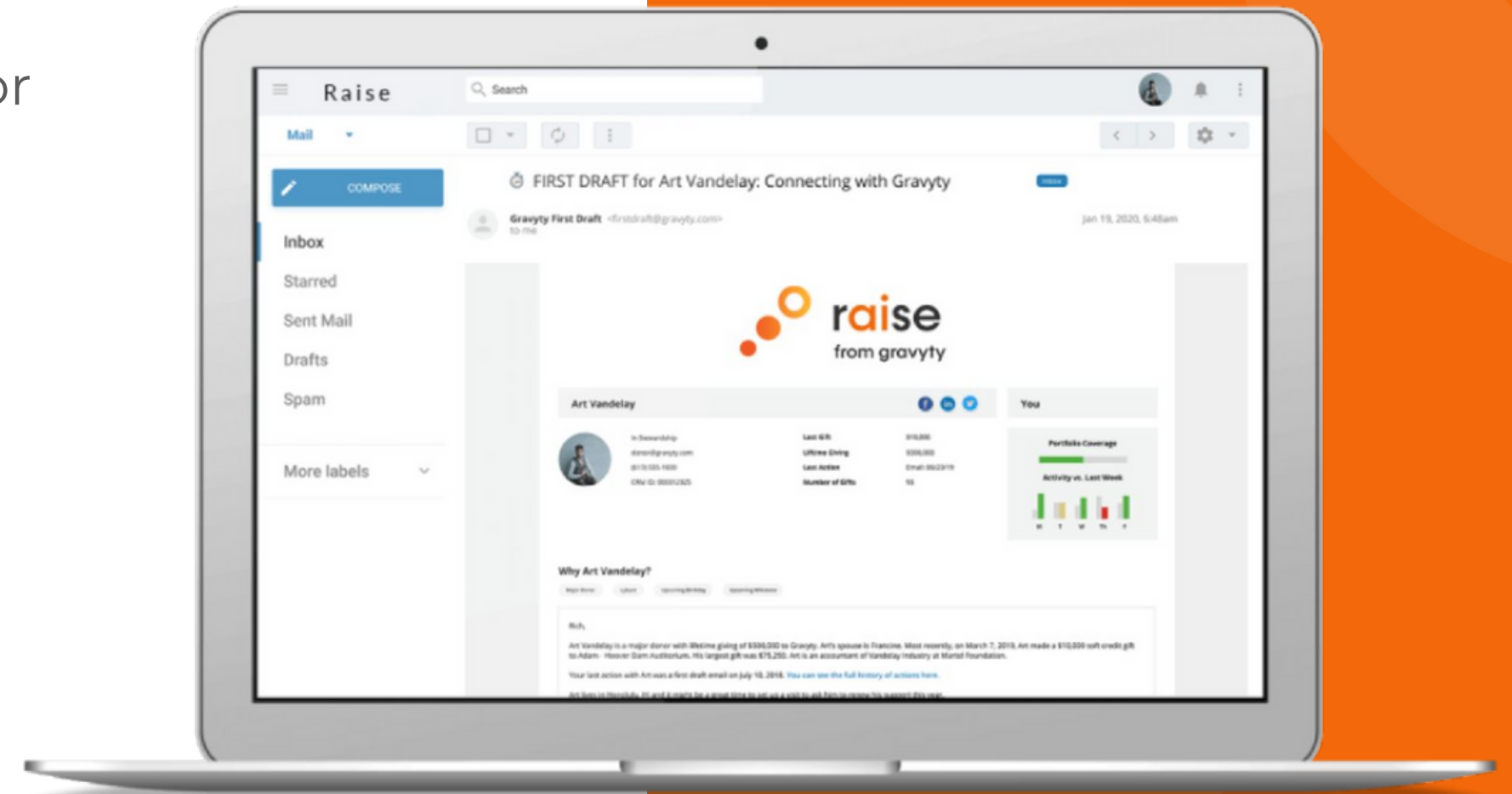


**FERRIS
BUELLER'S
DAY OFF**

What is Raise?

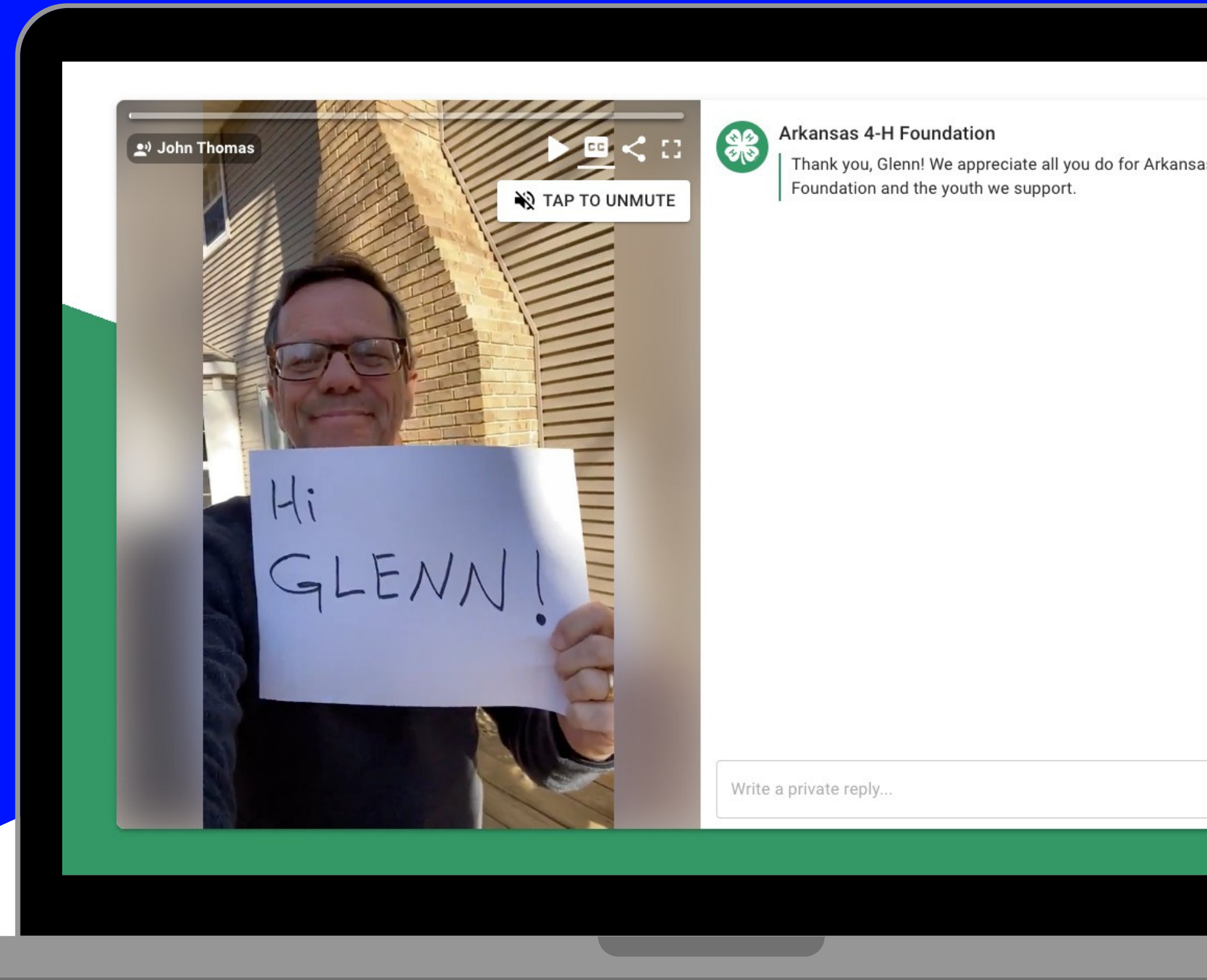
AI-powered fundraising

- Strategic + Targeted outreach Personalize donor communications
- Intelligent travel planning
- Move donors through pipeline
- Improve plan execution
- Automate record keeping
- Boost fundraiser capacity with increased efficiency

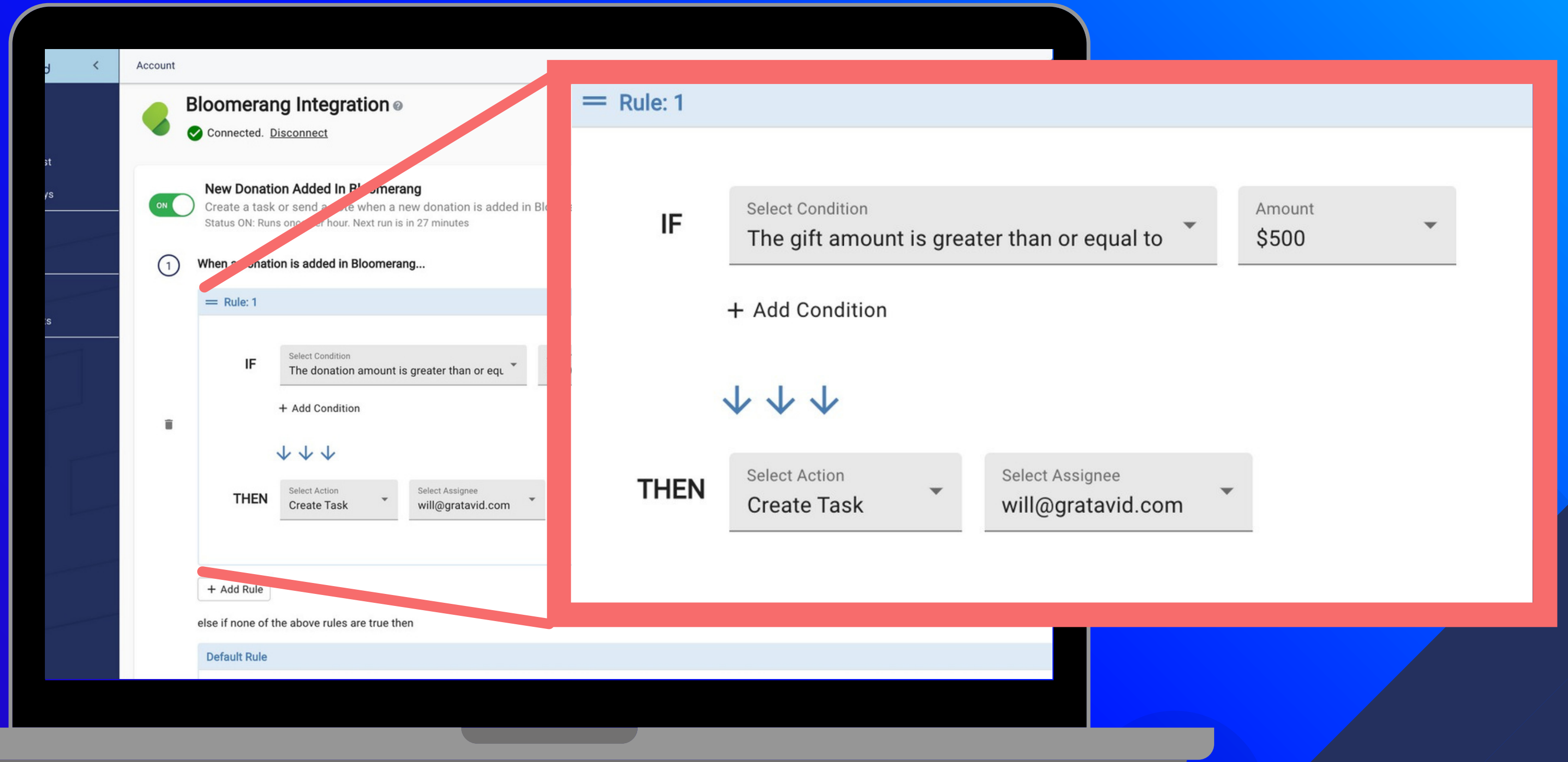


Gratavid

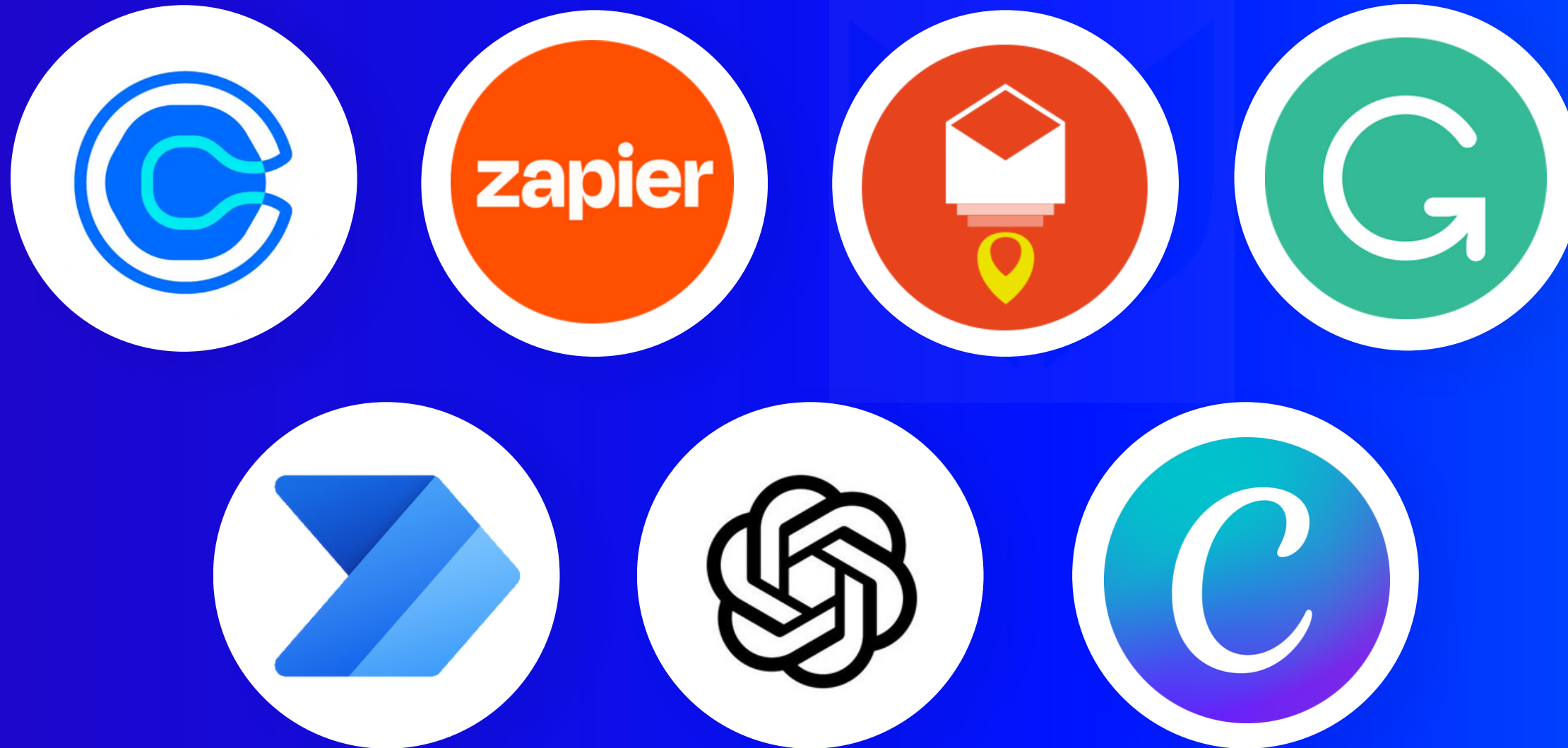
Bring human connection
to a digital world.



Gratavid + Bloomerang

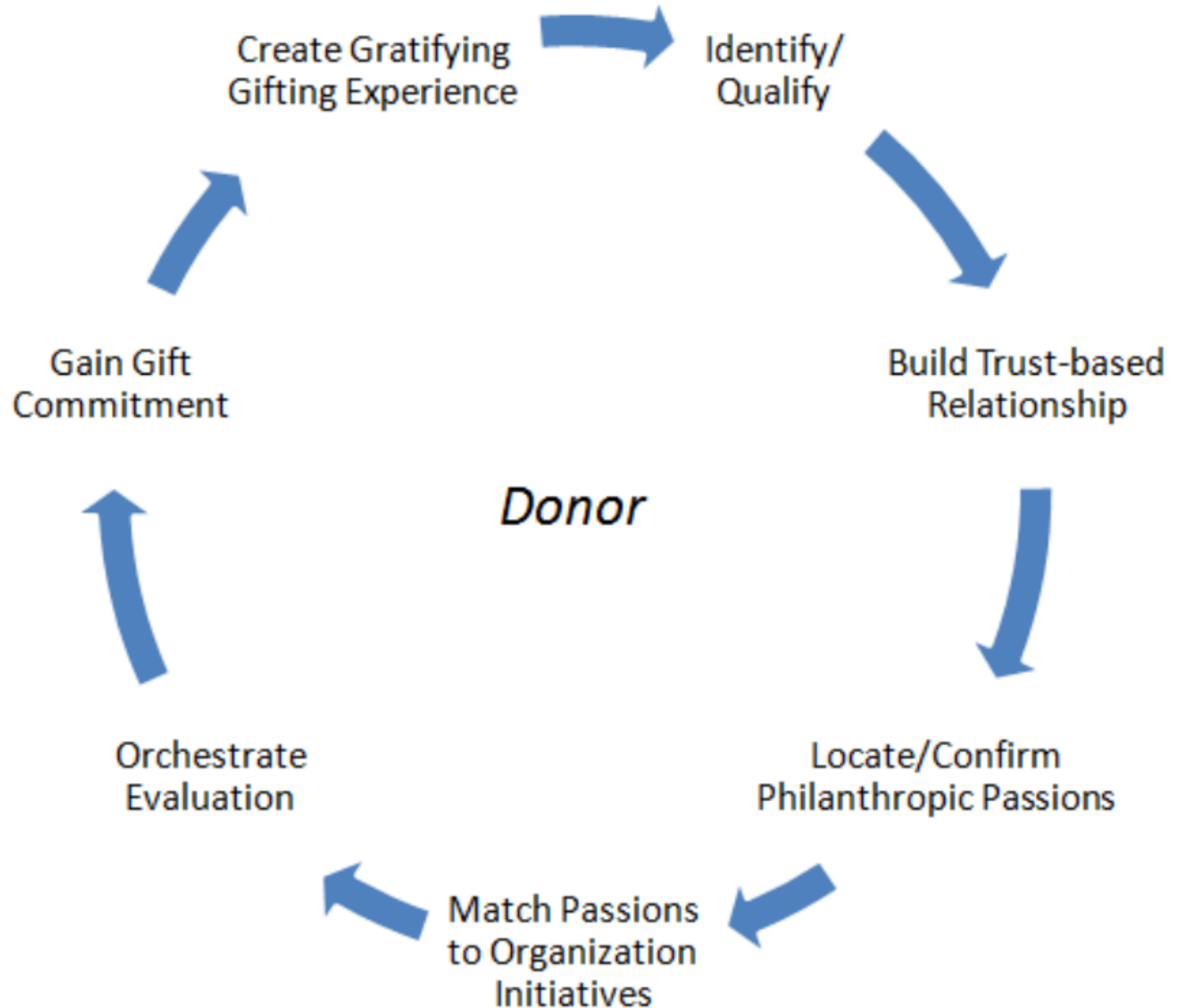


Other tool ideas



Relationship Continuity

Relationship continuity is vital in fundraising as it fosters trust, loyalty, and a deeper understanding between donors and organizations. Sustained relationships provide stability, consistent support, and the opportunity for donors to witness the impact of their contributions, ultimately leading to increased donor retention and long-term financial sustainability for the organization.



gravityty

Q & A

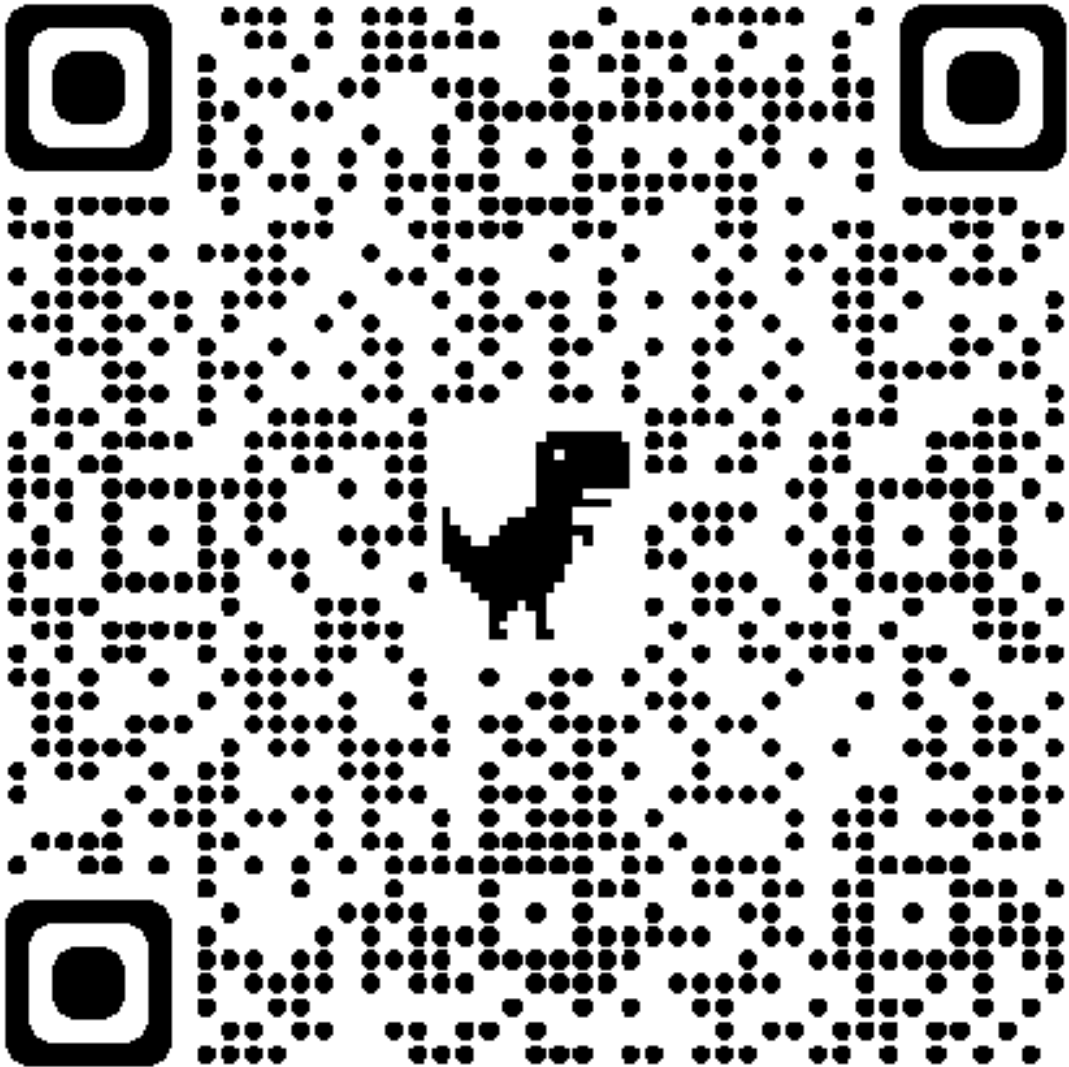


Next Steps

- ☑ Schedule a pipeline assessment
- ☑ Evaluate current processes
- ☑ Identify easy wins



Send me a sample



Thank you!

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Audience poll question

Would you like to see Gravyty's donor pipeline platform in action?

