

For Non-Profits

PIPELINE WORKSHEET

A pipeline is a set of repeatable steps that your development team follows to convert new contacts into donors. Use this worksheet to standardize your efforts and build a roadmap for your success.

INSTRUCTIONS

- 1 Write down the key activities, milestones, and decisions that **need to take place** through the course of acquiring a new donor.
- 2 Choose 3–7 **stages** to support that process. Typical stage names for non-profits include:
 - Prospect
 - Propose
 - Make Contact
 - Get Signature
 - Qualify
 - Receive Payment
 - Research
 - Check-In
 - Pitch
 - Re-Engage

Note: Each stage should have a **goal** that must be completed before the lead moves forward. What's the specific action or agreement that must be reached in each stage?


- 3 For each stage, **list the tasks** that your development team must complete to accomplish the stage goal. Some typical tasks include:
 - Call potential donor
 - Send informational material
 - Prepare for meeting
 - Collect information for proposal
 - Send gift packet(see: [follow-through tasks](#))

Optional: Do you assign fundraising leads to your team members based on territory, value, or other criteria? **Think about the rules** you currently use to distribute each new lead to the person who's most likely to close it. (You can automate these rules in Nutshell.)

Pro Indicates a feature only available in Nutshell Pro

Your Donor's Decision Process

WHAT HAPPENS FIRST?	WHAT HAPPENS NEXT?	THEN WHAT?	AND THEN?	AND FINALLY?
<div style="border: 1px solid #ccc; padding: 5px;">.....</div>	<div style="border: 1px solid #ccc; padding: 5px;">.....</div>	<div style="border: 1px solid #ccc; padding: 5px;">.....</div>	<div style="border: 1px solid #ccc; padding: 5px;">.....</div>	<div style="border: 1px solid #ccc; padding: 5px;">.....</div>



Your Sales Stages (aka Your Pipeline)

* To add pipeline stages, lead assignments, goals, tasks, and automated email sequences in Nutshell, go to your [Sales Automation](#) page

WHO DOES THIS?	WHO DOES THIS?	WHO DOES THIS?	WHO DOES THIS?	WHO DOES THIS?
<div style="border: 1px solid #ccc; padding: 5px;">.....</div>	<div style="border: 1px solid #ccc; padding: 5px;">.....</div>	<div style="border: 1px solid #ccc; padding: 5px;">.....</div>	<div style="border: 1px solid #ccc; padding: 5px;">.....</div>	<div style="border: 1px solid #ccc; padding: 5px;">.....</div>
STAGE GOAL <small>Pro</small>	STAGE GOAL <small>Pro</small>	STAGE GOAL <small>Pro</small>	STAGE GOAL <small>Pro</small>	STAGE GOAL <small>Pro</small>
<div style="border: 1px solid #ccc; padding: 5px;">.....</div>	<div style="border: 1px solid #ccc; padding: 5px;">.....</div>	<div style="border: 1px solid #ccc; padding: 5px;">.....</div>	<div style="border: 1px solid #ccc; padding: 5px;">.....</div>	<div style="border: 1px solid #ccc; padding: 5px;">.....</div>
TASKS <small>Pro</small>	TASKS <small>Pro</small>	TASKS <small>Pro</small>	TASKS <small>Pro</small>	TASKS <small>Pro</small>
<div style="border: 1px solid #ccc; padding: 5px;"><input type="checkbox"/></div>	<div style="border: 1px solid #ccc; padding: 5px;"><input type="checkbox"/></div>	<div style="border: 1px solid #ccc; padding: 5px;"><input type="checkbox"/></div>	<div style="border: 1px solid #ccc; padding: 5px;"><input type="checkbox"/></div>	<div style="border: 1px solid #ccc; padding: 5px;"><input type="checkbox"/></div>
<div style="border: 1px solid #ccc; padding: 5px;"><input type="checkbox"/></div>	<div style="border: 1px solid #ccc; padding: 5px;"><input type="checkbox"/></div>	<div style="border: 1px solid #ccc; padding: 5px;"><input type="checkbox"/></div>	<div style="border: 1px solid #ccc; padding: 5px;"><input type="checkbox"/></div>	<div style="border: 1px solid #ccc; padding: 5px;"><input type="checkbox"/></div>
<div style="border: 1px solid #ccc; padding: 5px;"><input type="checkbox"/></div>	<div style="border: 1px solid #ccc; padding: 5px;"><input type="checkbox"/></div>	<div style="border: 1px solid #ccc; padding: 5px;"><input type="checkbox"/></div>	<div style="border: 1px solid #ccc; padding: 5px;"><input type="checkbox"/></div>	<div style="border: 1px solid #ccc; padding: 5px;"><input type="checkbox"/></div>