

# 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

- Write down the key activities, milestones, and decisions that **need to take place** throughout the course of every relationship.
- Choose a series of **stages** to support that process—between 3–7, depending on the complexity of the relationship. Typical stage names include:
  - Prospect
  - Propose
  - Make Contact
  - Get Signature
  - Qualify
  - Receive Payment
  - Research
  - Check-In
  - Pitch
  - Re-Engage

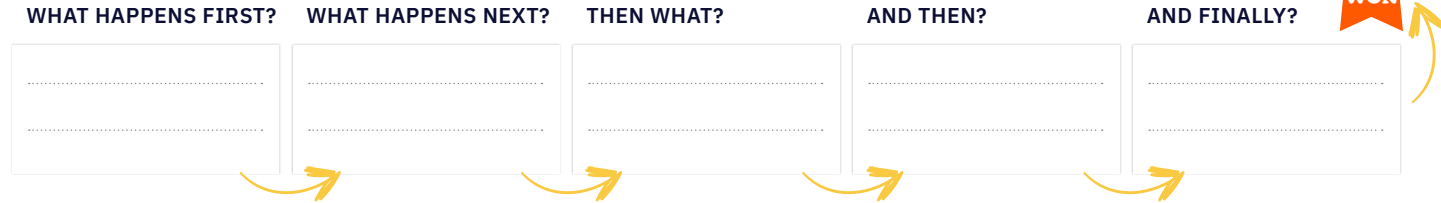
*Note:* Each stage should have a **goal** that must be completed before the lead moves forward. What's the specific action or agreement that must be reached in each stage?

- 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



## 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



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