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.

Nutshell

INSTRUCTIONS

1. Write down the key activities, milestones, and decisions that **need to take place** throughout the course of every relationship.

2. Choose a series of **stages** to support that process—between 3–7, depending on the complexity of the relationship. Typical stage names include:

- Prospect
- Make Contact
- Qualify
- Research
- Pitch
- Propose
- Get Signature
- Receive Payment
- Check-In
- 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

LEAD WON

WHAT HAPPENS FIRST?	WHAT HAPPENS NEXT?	THEN WHAT?	AND THEN?	AND FINALLY?

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?
STAGE GOAL Pro	STAGE GOAL Pro	STAGE GOAL Pro	STAGE GOAL Pro	STAGE GOAL Pro
TASKS Pro	TASKS Pro	TASKS Pro	TASKS Pro	TASKS Pro
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