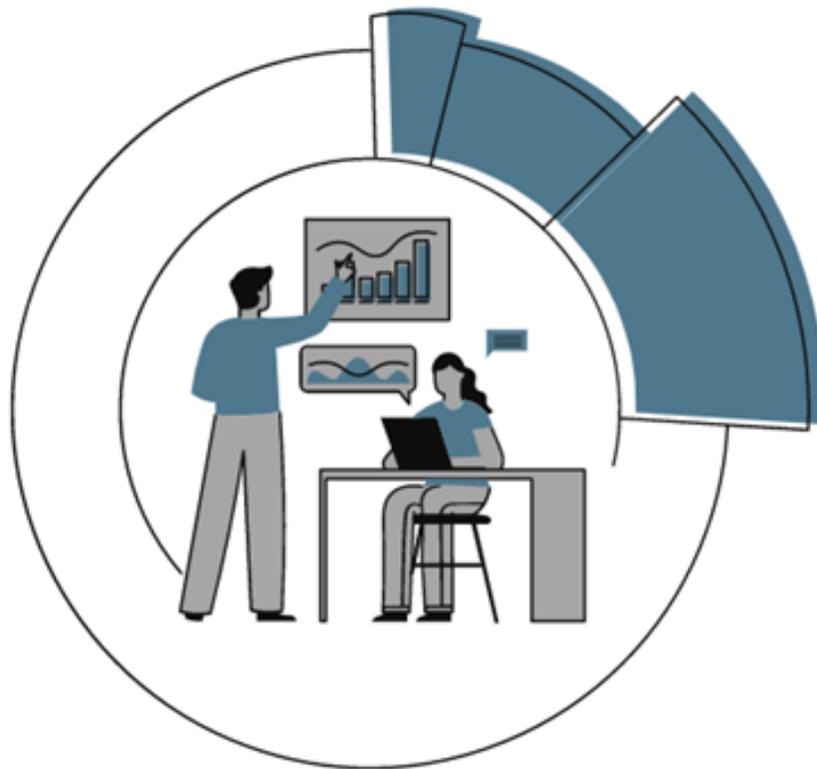


# The Fundraising Success Formula Workbook



Please visit [www.getdatabasey.com](http://www.getdatabasey.com) for more information about our company's services. Email us at [info@getdatabasey.com](mailto:info@getdatabasey.com) for inquiries.

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La Pine, Oregon

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The Fundraising Success Formula is designed to help you:

Raise more  
money

Spend time  
wisely

Improve donor  
experience

What problems are you facing in your development department?  
What is taking you away from fundraising?

- I'm called into too many meetings and don't have time to get out and meet donors.
- I don't trust the database or the reports that come from the database.
- My to-do list is never-ending.
- I am re-inventing the wheel with every solicitation.
- Our wealth screening has me chasing whales that have no affinity to my organization.
- My portfolio is average at best, and I have trouble finding new prospects.
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

# Focus your energy and your time

Stop moving a millimeter on a million different things and focus on the one (or a couple) things that will help you achieve your goal.

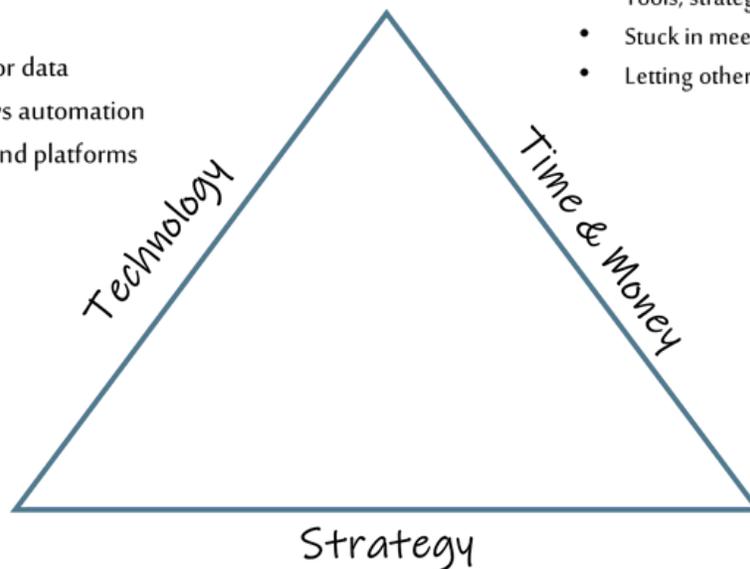
What is your ultimate goal?



# Biggest Challenges That Impede Success

Trying to manage technology, time and money, and/or strategy tends to be the three biggest challenges we see from clients. Do you struggle with these things? What would you add to the lists below?

- Managing gift and donor data
- Manual manipulation vs automation
- Having the right tools and platforms



- Trial and error
- Tools, strategies that didn't get results
- Stuck in meetings
- Letting others dictate your time and attention

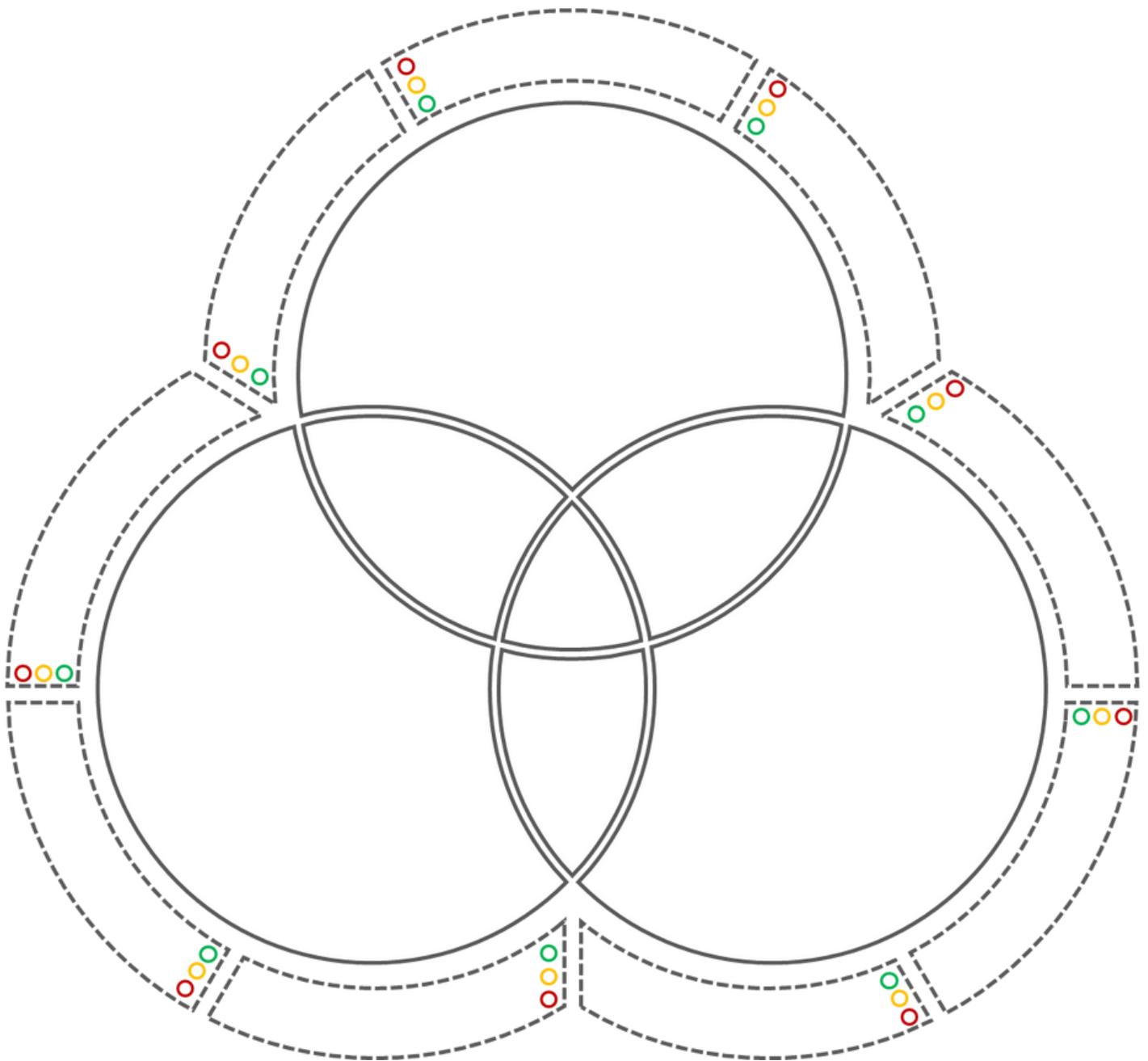
- No fundraising plan
- Lack of systems and processes
- Wrong prospects, message, metrics

# The Fundraising Success Formula

**Red:** This element is broken, not working efficiently, or non-existent

**Yellow:** This is okay but if it isn't fixed in the near future, it will be red

**Green:** This is good to go! These elements are efficient and effective



Now that you know the keys to a successful, thriving fundraising program, would you like to learn how we do this for our clients?

All of the elements work together to create a sustainable, thriving fundraising program. If you are missing even one of the areas, you won't be as successful as you could be with your fundraising.

- 1) **We help you** create strong operations. Fundraising operations directly link to the fundraiser's success because they are not mired with small operational tasks. Operations also support donors' experience and ensure that information gets to them at the right time through the right channels.
- 2) **We collaborate with you** to craft a meaningful, curated experience for donors at all levels and in all stages of the moves management process. When a donor has a sophisticated experience, they fully understand and have experienced the impact the organization makes and how their funding plays a role in those accomplishments.
- 3) **We teach you how** to build deep, lasting relationships with donors. This results in lifelong donors who trust the organization, have unwavering faith that the organization will move the needle in the issue areas they care about and increase their support of those efforts.
- 4) **We partner with you** to create successful fundraisers who are not tied to their desk, have a suite of tools at their disposal, and are pursuing the right prospects at the right time.
- 5) **We join forces with you** to build unforgettable stewardship that demonstrates the impact your organization makes and ties accomplishments back to donors. These efforts lead to lifelong donors and a sophisticated donor experience.
- 6) **We coach you** on ensuring that the right prospects are in portfolios and they have a purposeful experience with the organization. Qualification and engaging cultivation lends itself to successful fundraisers and a sophisticated donor experience.

**We want you to be successful!** That's why we've created a free masterclass that walks you through in more detail how we help our clients build thriving, sustainable fundraising programs. Click the link below to watch the masterclass.

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