

# How Top Nonprofits Build Communities & Generate Recurring Revenue

Combining Strategy, Systems & Relationship for Real Results

with Hailey Walker, Principal Marketing & Automations Consultant



# Agenda

My goal: To help you understand how to build a community & generate recurring revenue.

1. Introductions
2. Level set
3. Activity
4. Wrap up
5. Q&A

# Introductions

# 10 years in marketing & communications

## 2015

Engagement Coordinator for the University of Calgary, Office of Sustainability

## 2016

Biked across Canada solo

## 2017

Communications Coordinator at County of St. Paul, Alberta

## 2019

Communications Manager at Municipal Climate Change Action Centre

## 2020

Started marketing & comms consulting with energy efficiency businesses & environmental nonprofits on the side

## 2021

Communications Manager at Alberta Ecotrust Foundation

## 2022

Marketing Product Strategist at E Source (advising utility companies on marketing & comms across North America)

## 2025

Launched Echoroot full-time as a marketing and automations consultant





I've worked with clients like...



And I'm trusted by...



# You are in the right place if you...

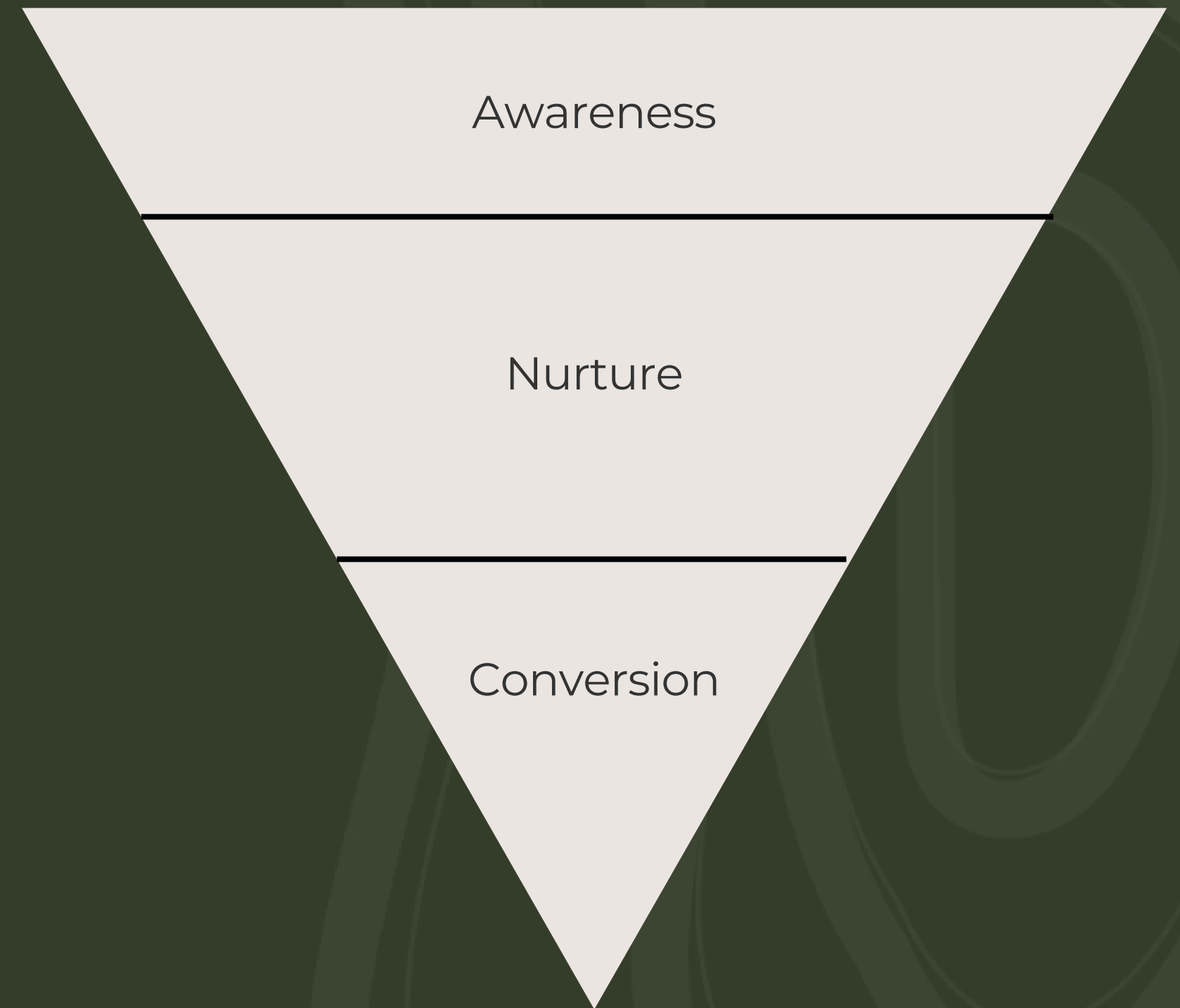
- You want practical strategies to move supporters through a journey from awareness to financial contribution.
- You want systematic approaches to deepen relationships and create engagement strategies that work both virtually and in-person.
- You want to improve how you communicate and make your outreach more efficient, strategic, and compelling.
- You want actionable frameworks and tools that make execution easier, not just theory, but implementable strategies and systems.



Let's go!

# The marketing funnel

To guide new people through the buying stages in three stages.



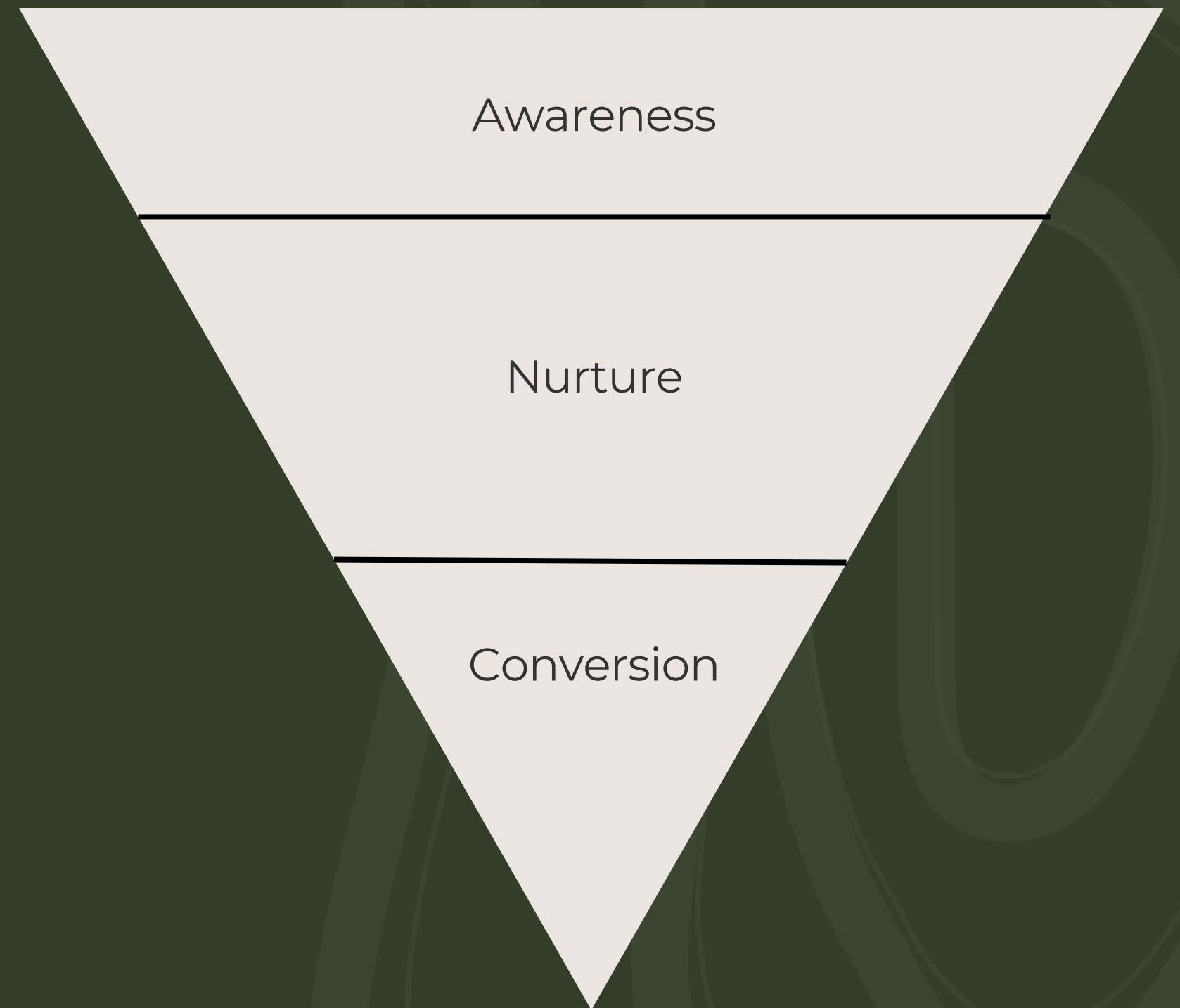


# The marketing funnel

**Old way:** Skip the middle. Top to Bottom! Direct response marketing.

**New way:**

- Top: Traffic, social, lead magnets, webinars, etc.
- *Middle: Strong email marketing to build trust.*
- Bottom: Offers, programs, donation pages





The future of marketing?

The future of marketing  
will be focused on  
community building

Community building  
is done in the nurture  
stage of the funnel



Build out that nurture  
stage by mapping your  
brand universe

# What is your brand universe?

**Think about the last time you discovered a brand and immediately fell in love with it.**

*You might have:*

- Stopped scrolling on their post on social media.
- Got curious and checked out their profile and followed them.
- Downloaded their content and got an email and signed up to their list.
- Decided to reach out and purchase something from them.
- Determined that experience with them was worth it and came back for more when they reached back out.

**That entire experience?**

That's THEIR brand universe.

Every touchpoint. Every interaction.

Every piece of content, emails, website pages...

How it looked. How it felt. How it sounded.

It all adds up to create a complete experience.

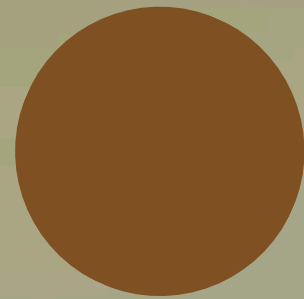
# How to build a community

You need to know who is in your universe....

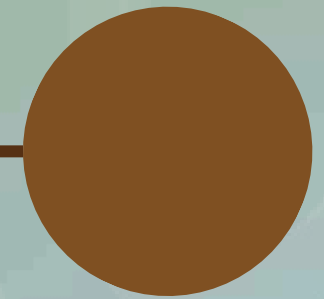
1. Who are they?
2. What problem are they trying to solve?
3. Why do they need that problem solved?
4. Who you are?
5. How you help them solve that problem?

# The typical journey

Awareness



Conversion



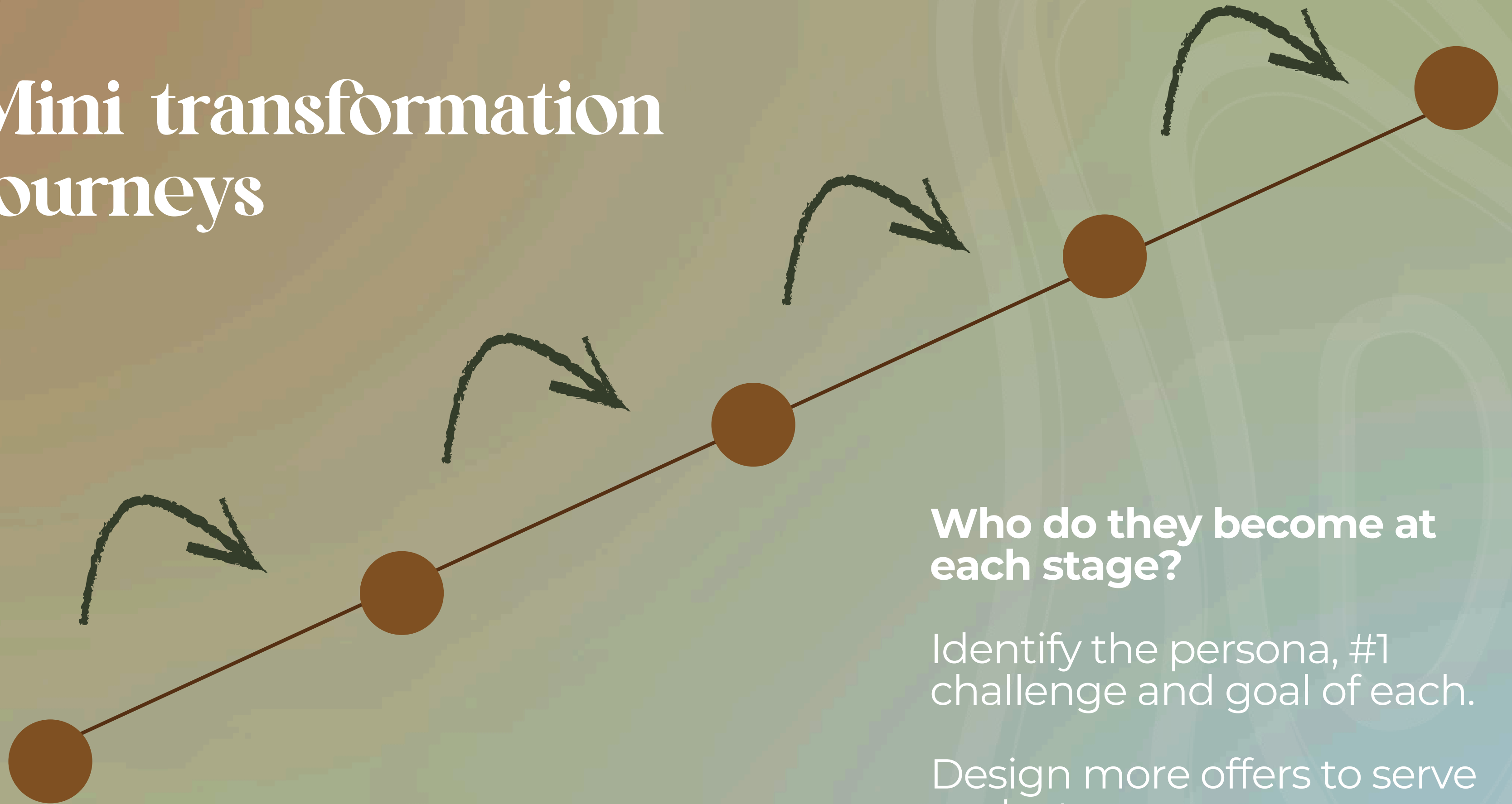


# How to keep them in your community

But first you need to know....

1. Who do they become?
2. What new problem are they trying to solve?
3. Why do they need that problem new solved?
4. Who you are?
5. How you help them solve that new problem?

# Mini transformation journeys



**Who do they become at each stage?**

Identify the persona, #1 challenge and goal of each.

Design more offers to serve each stage.

# Understanding & mapping your brand universe

# Visualizing the Path Your Community Takes

- A step-by-step visual of how people engage with your brand
- Includes touchpoints, actions, emotions, and pain points
- Helps align marketing, sales, and operations
- Spot where your missing specific tools

1. Awareness - How people discover you
2. Interest - What happens when they're curious
3. Decision - How they move from "maybe" to "yes"
4. Onboarding - Their first experience with your offer
5. Retention - How you nurture the relationship



# Why Map the Journey?

- Improve lead conversion and reduce drop-offs
- Clarify responsibilities at each stage
- Identify where automation or human touch is needed
- Deliver a more consistent and personalized experience
- Connect the dots between your different offers
- Understand the gaps in your systems and tools

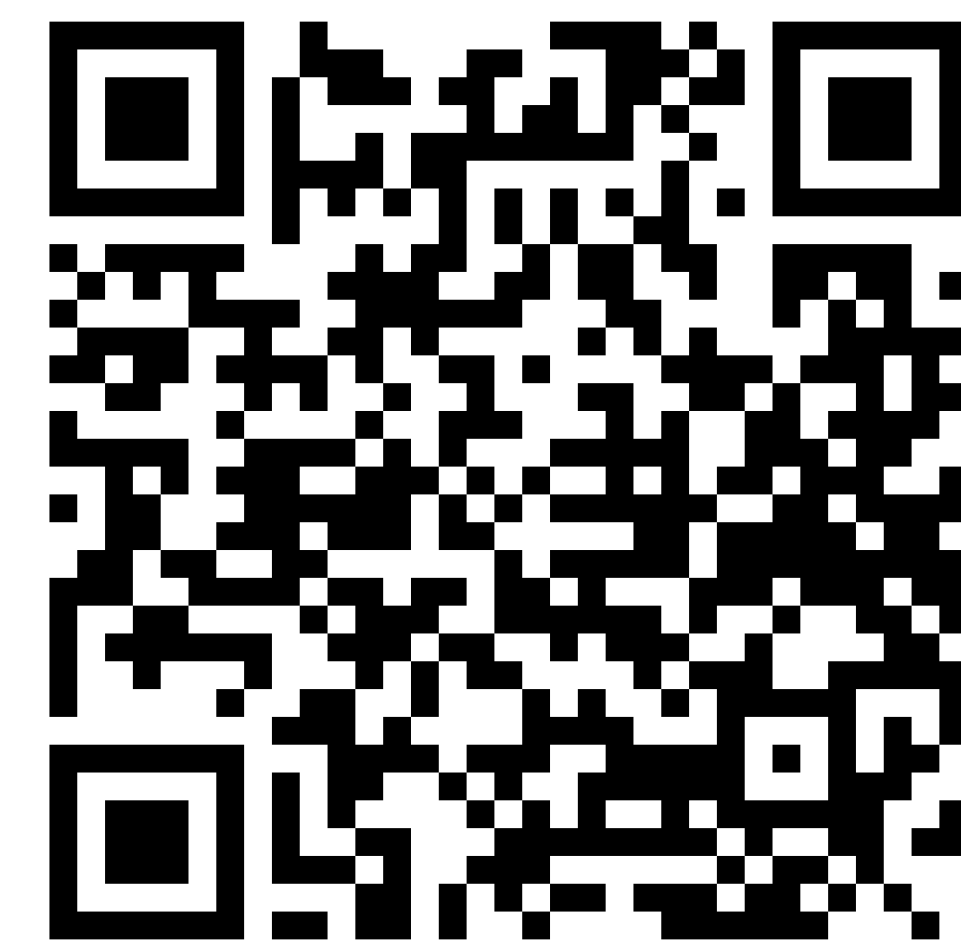
# 6 types of tools

**you need & how  
to choose them**

*And my top recommendations  
for your tech stack*



Scan the QR  
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## HOW TO CHOOSE THE RIGHT TOOLS FOR YOUR BUSINESS

And my top recommendations  
for your tech stack

By @hailey.echoroot  
[www.echorootconsulting.ca](http://www.echorootconsulting.ca)

# What We'll Build Together

- Identify lead sources
- Define each stage of your pipeline
- Understand what happens at each stage (actions + tools)
- Highlight bottlenecks and follow-up gaps
- Identify what tasks could be automated



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# 128 ideas

of what to automate  
in your business

*to save you time and grow on autopilot*





**128 THINGS TO  
AUTOMATE IN  
YOUR BUSINESS**

To save time and grow on autopilot

By [@hailey.echoroot](mailto:@hailey.echoroot)  
[www.echorootconsulting.ca](http://www.echorootconsulting.ca)

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# Let's Map It Out

1

## Map

Real-time sketching of your current journey and the pathways people can take.

2

## Discuss

We'll discuss the key stages and how you specifically interact with your community.

3

## Review

Identifying gaps, adjust the pathways and spot automation opportunities.

# Customer Journey Mapping Tools

To help you visualize and document your customer journey, here are several tool options depending on what you have access to:

- **If You Have Microsoft Products:** Microsoft Visio
- **Free Web-Based Options:**
  - [draw.io](https://draw.io) ([diagrams.net](https://diagrams.net))
  - Canva (Free Tier)
  - Lucid Chart

**You mind might be racing...**



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# \$100K GAP

MINI-COURSE



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# \$100K GAP

MINI-COURSE



Scan the QR  
Code to get the  
mini-course



## What you get:

- In-depth self-study lessons breaking down how to:
  - Define each stage of your pipeline
  - Understand what happens at each stage
  - Highlight bottlenecks and gaps
  - Identify what tasks could be automated

**Investment: \$47**

“

**“We discovered our whole team could be spending 10 more hours each week on growing our community and running our conservation programs”**



“We’d grown immensely in a short period, which was exactly what we wanted. But our backend systems hadn’t scaled with us, and the cracks were starting to show. Workshop registrations were eating up hours during our busiest seasons. Volunteers couldn’t access information independently. Follow-ups for our programs getting missed.

**We calculated that each of our team members, and we have a team of 5, were spending 10+ hours each every week on administrative tasks that could be automated, plus losing opportunities because people went cold without systematic follow-up.** After taking the next step and getting help from Hailey, our systems run in the background while the team focuses on the conservation work they love doing.”



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**BOOK A FREE 30-MINUTE**

**STRATEGY**

**CALL**





BOOK A FREE 30-MINUTE

# STRATEGY CALL



## What you get:

- I'll review of the map you created with you and give you personalized recommendations.
- We'll discuss your current challenges and what's slowing your growth down.
- Talk through what strategies, tools, and automations could help your organization grow.

**Investment: FREE!**

**Scan the QR  
Code to book  
a free call**





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## **“Our one audit call uncovered \$47K+ in lost annual revenue”**

When I worked with this disability justice nonprofit organization, we started with what seemed like a simple audit. But as we mapped out their customer journey on the call, from inquiry to booking to service delivery to follow-up, the founder started seeing patterns they hadn't noticed before. Clients were showing up unprepared because there was no structured onboarding. Service time was being wasted teaching basics. Post-service follow-ups were all manual, eating up hours on custom requests they didn't want to do.

We calculated they were leaving approximately \$47,000 on the table annually. Not just from underpricing, but from operational inefficiencies and giving away expertise for free. So we restructured everything. We also mapped out automation opportunities for booking, payment processing, and client communications. As the founder said during our debrief, it was the first time they'd seen how all the pieces connected and where their time and money was being wasted.

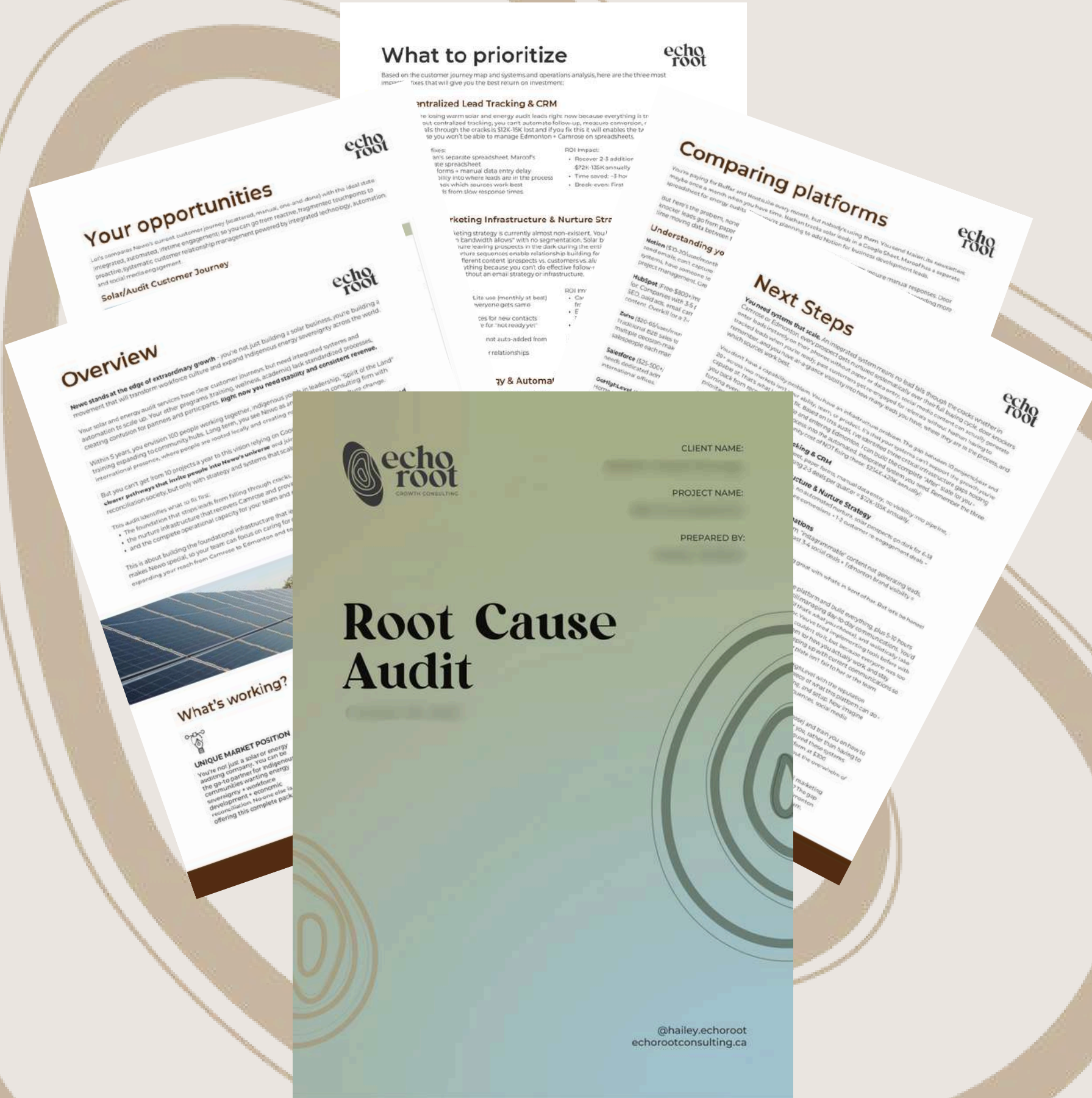




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# ROOT CAUSE AUDIT





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Code to book an  
audit call



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# ROOT CAUSE AUDIT



## What you get:

- I'll map your complete customer journey & universe.
- Identify gaps in your journey, what each gap costs you, and opportunities to grow your community
- Get a report with specific automation workflows and tool recommendations for your organization.
- Get a 30-90 day roadmap with what to fix first and why
- Walk away with your complete plan and how everything connects together and sets you up to grow sustainably.

**Investment: \$497**

**Scan the QR  
Code to book an  
audit call**





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## **“We uncovered more than \$200,000 in missed opportunities”**

When I first worked with this nonprofit social enterprise, their systems looked like most growing nonprofits (a mix of Google Sheets, scattered tools, and great intentions.)

Leads were coming in from door knockers, social media, and trade shows, but everything had to be entered manually. Follow-ups slipped, quotes got delayed, and promising connections went cold.

So we mapped their entire customer journey and uncovered more than \$234,000 in missed opportunities, all from manual tracking, inconsistent follow-up, and underused content. As their Executive Director said, *"This is the first time I've seen our complete business on one page. Really glad for this self-reflection. Thank you Hailey."*



# Take what you need



6 types of tools & my tech stack recommendations



Book a free 30-min strategy call



128 ideas of what to automate in your business



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# Q&A

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# THANK YOU

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