

The
Fundraiser's
Guide to
AUTOMATION
Made **EASY**

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Introduction

If you're like most fundraisers, you're swamped with repeat tasks—sending thank you notes, stewardship, and follow-up communications to report back to donors on their gift's impact.

What comes to mind when you hear words like “automation” or “donor journey automation”?

Futuristic robots? Tech gremlins? A technological glitch that makes something meant to feel personal, like using a donor's first name, feel just the opposite because it reads “Dear friend” instead?

Are your palms getting sweaty yet?

You've invested tons of work over the years building relationships with donors. It's natural to feel protective and not want anything to jeopardize them. You're smart to want to ensure that automation feels personal and authentic.

You're not replacing yourself—you're scaling yourself.

Here's the truth about automations:

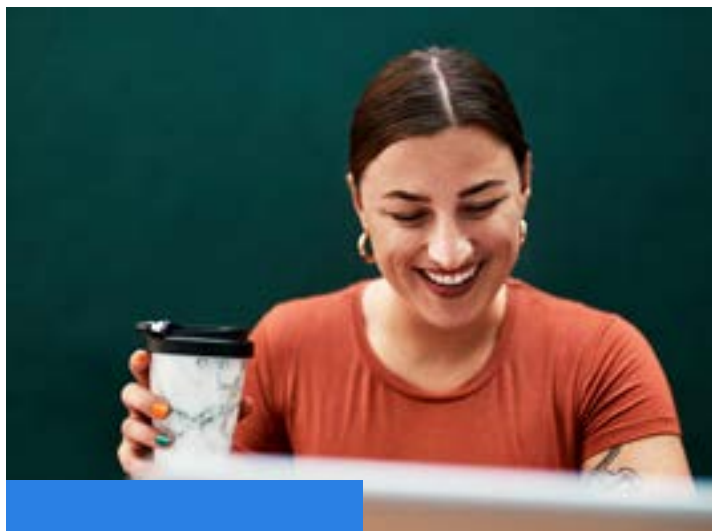
Automation doesn't mean less you—it means more of you, reaching more donors in a thoughtful, consistent way. The goal isn't to sound like a robot. The goal is to sound like warm, thoughtful, approachable you all the time.

When you do automation right, you strengthen relationships.

How? Automation lets you:

- Deliver thoughtful, prompt donor care that builds trust.
- Use everything you know about your donors to deepen the relationship.
- Surprise and delight donors with thoughtful messages on special days, like holidays, the anniversary of their first gift (“donoriversary”), or a donor’s birthday.

But perhaps most importantly, it frees you up to have more time to interact in ways that matter most, like picking up the phone to thank a first-time donor, welcome a new monthly donor, or tell a major gift donor about a win they made possible.



Done right, it makes donor love easier—not colder.

A thoughtful welcome series for new donors helps you get to know them better and makes them feel part of the family. A birthday email, video, text, or call that brightens their day. An email, video, text, or call celebrating their “donorversary” that makes them feel like a cherished family member and bakes in the wow factor.

Donors don't want more mass communications from you. They want the right things from you, like hearing personalized messages from you at the right times (right after a gift, a visit, attending an event, volunteering, etc.).

Automation helps you deliver that at scale.

You still write the words. Automation is just your delivery driver. These are your words—you determine the tone, message, and frequency. Automation just sends your carefully crafted message at the right time, to the right donor, without you needing to remember.

Automation isn't limited to messages. It includes tasks too, like calling a donor to give them an update, wish them a happy birthday, or celebrating a holiday or milestone that's important to them. It can also include automated prompts like one that reminds you to enter your notes from your donor meeting into your CRM.

The secret to deepening any donor relationship is making something meaningful to a donor meaningful to you.

Automation isn't cold. Bland, lifeless writing is cold. When your message is heartfelt and authentic, automation becomes just a smart way to deliver it.



Why you can't afford NOT to automate.

Let me tell you about a fundraiser I know. We'll call her Sarah. Sarah is a one-person gratitude machine. She insists on writing every thank-you by hand. Every donor email is custom. Every follow-up is personal. She's got a heart the size of a barn and a work ethic to match. But she's also got dark circles under her eyes and a to-do list that's longer than a CVS receipt. She's trying to scale a mountain with a teaspoon.

Why? Because she's scared of automation. She's afraid it will make her sound like a robot. She's scared she won't set it up right and there will be a technology glitch, and donors will get the wrong message at the wrong time.



Here's the kicker. Despite her herculean efforts, Sarah is losing donors. Not because she doesn't care—she cares too much—but because she runs out of hours in the day. First-time givers go unthanked. Monthly donors lapse without a whisper. Major donor milestones come and go—no card, no email, no warm fuzzy. She wanted to do it. She meant to love them properly. But the time just wasn't there. And the donors? They just didn't feel seen. Or valued. Or part of the family. They're gone. Quietly. No drama. Donor attrition isn't noisy.

Now here's what Sarah doesn't know yet: automation isn't the enemy. It's the cavalry.

Imagine Sarah queueing up a heartfelt welcome series that made new donors feel like VIPs—automatically. Imagine if birthdays, thank-you's, and reporting back updates all rolled out like clockwork while Sarah caught her breath (or ate lunch for once). Automation doesn't dilute the love. It delivers it. On time. Every time. With Sarah's heart, her voice, her words—just without the burnout.

How automation future-proofs your fundraising (and saves your sanity).

Let's get real. As consumers, we have very high expectations around customer service. News flash—your donors have the same expectations of you. We live in an Amazon Prime world now. Donors expect fast, personal, thoughtful follow-up and excellent donor care. They want to feel seen. Appreciated. Known by you. And if they don't? They're gone. Off to some other cause that made them feel like a hero immediately.

So how do you meet those expectations consistently—without working 90 hours a week or cloning yourself? One word: automation.

You write it once. You set it up. You test it. And it runs quietly in the background, like a super-reliable assistant who never takes a sick day. A welcome series for new donors. Automated birthday emails. Thank-you messages that trigger the minute a gift is received. All crafted with your tone, your heart, your brand—and delivered like clockwork.

Every few months, scroll through your automations, testing the messages you have set up. It takes 15-20 minutes. Why test? Just to ensure the messages are all still as timely and relevant as the day you created them and that all dates, links, and time-bound information in your automations are still relevant.

Automation doesn't replace relationships. It protects them. It ensures no donor slips through the cracks just because you had your gala, board meeting, and three other events this week. It future-proofs your stewardship, your retention, your revenue. Automation is a system to help you keep doing what you do best—making donors feel like the most important people in the world long after your to-do list says “enough”.





Automation tips

Test them regularly. What's the most important thing you should do with your automations? Review your automations monthly to make sure the content is still accurate, relevant, and heartfelt.

What should you leave out of automation? Dates and deadlines.

Map the donor journey. Automations work best when they follow the natural rhythm of a donor's relationship with you. Make sure the timing, tone, and content of each automated message matches where the donor is in their relationship with you.

Watch for personalization pitfalls. A merge field gone wrong ("Dear [FIRSTNAME]") is the fastest way to ruin the illusion of a personal connection. It doesn't just feel impersonal. It feels sloppy. Test every automation thoroughly before launch, and always build in fallbacks, like substituting "you" as a custom field for %Firstname% if the first name field is empty.

Avoid Robotic or Generic Language. Does your automation read like it was written by a robot (think generic, cold, or overly formal)? News flash: we don't write like we talk. Write like a human talking to another human. Use donor-centered language, read it out loud to test it, and make sure it sounds like you.

Best-in-class use cases.

The greatest gift we can give our donors is the gift of feeling known by us. When automation is done right, it strengthens relationships by allowing you to deliver thoughtful, prompt donor care at scale. This section provides templates and examples for how to use automation to delight your donors on special occasions and at key moments in their giving journey.





First-time donor “Thank You” email

Imagine you make your first gift to a nonprofit and they send you a warm, welcoming email telling you how thrilled they are to welcome you into their donor family. That would feel a lot better than a generic thanks. The solution for acknowledging new donors is as simple as adding one sentence at the beginning of your thank you letter acknowledging that they’re a new donor, welcoming them to your donor family, and signaling to them that there are great things to come, as seen in the example below:

Subject line: You just did a wonderful thing {First name}

Dear {First name},

I’m overjoyed to see such a generous first-time gift from you and I’m thrilled to welcome you into our donor family. Your gift will [state what you said you would do in the appeal, like feed hungry children]. Because of your kindness and generosity, [describe the impact of the gift]. Thanks to your big-hearted compassion, [insert target beneficiary, like hungry kids, homeless pets, hurting children, or lonely seniors] like [insert name of one target beneficiary] will be able to [insert outcome, i.e. get the vaccines they need, or get after-school tutoring to thrive in school].

Optional: include a smiling close-up photo of the target beneficiary being helped. Make sure they’re making eye contact with the camera. Consider adding a caption that could include their first name or describe what they’re doing in the photo, or a few short words about how the gift will help them, like, “Your gift feeds hungry orphans just like Benya”.

We can’t wait to update you in our monthly email newsletter on all the ways your gift is making a difference.

For your tax records, we’re in grateful receipt of your generous \$[gift amount] received on [date gift received]. {Org name} is a 501c(3) non-profit organization, tax ID [enter number here], and your donation is tax-deductible to the extent allowable by law.

P.S. If I can answer any questions or give you a tour of [org name], please give me a call at {phone number} or shoot me an email at (email address).

Scanned Signature

Name

Title




New monthly donor welcome email

You don't want your monthly donor to receive the exact same email, with the same copy and the same subject line every month when you process their gift. They should get a warm, personal thank you welcoming them into the monthly giving program when they make their first monthly gift. When people sign up, make them feel part of something special by sharing the impact of their gift, along with a compelling story of how it makes a difference. Additionally, set clear expectations for how and when they will hear from you. You can give them the option to hear from you each month, every quarter, or once a year through an annual consolidated receipt.

Subject line: Welcome to the club [name of monthly giving program, like, 'Penguin Protector Club']

Dear {Donor first name},

You're a lifesaver with a passion for [insert verb + target beneficiaries, for example, helping struggling children thrive, making sure every homeless rescue finds a loving home]. Thank you for stepping up as a monthly donor by joining our Penguin Protector Club.

 Your commitment to our feathered friends says everything there is to know about your kind and compassionate heart. ❤️

You aren't just a donor, {Donor first name}. You're a hero to every bird in our colony. Because of you, [describe the outcome of gift, like, birds like Lulu, whose front feathers were damaged from an oil spill, are getting life-saving sweaters to stay warm and safe from the harsh freezing winter].

We love sharing uplifting stories and the tangible impacts of your generosity. We want to stay connected with you your way. Please choose how frequently you'd like to hear from us:

- **Monthly updates:** Get heartwarming stories and updates delivered to your inbox with your gift receipt every month.
- **Quarterly digests:** Prefer a seasonal summary? Opt for a quarterly email with your gift receipt and uplifting stories of how you're making a real impact.
- **Annual report:** We can also provide a detailed report once a year, complete with a consolidated giving summary for your records.

Please let us know your preference by replying to this email or updating your preferences [insert link].

Thank you for your kind and generous heart.

For the love of penguins,

Scanned Signature

{Your CEO's Name}

{CEO Title}

P.S. If I can answer any questions, please give me a call at {phone number} or shoot me an email at {email address}.



Celebrating a donor's birthday

The greatest gift we can give our donors is the gift of feeling known by us. Chances are, if you know your donor's birthday, you have a pretty close relationship with them. Why not show them the love on their special day to show how much you care? No gifts needed—just thoughtful stewardship.

Example video celebrating donor's birthday sent via text

A personal video birthday message from you is a nice personal touch, but imagine being serenaded by the target beneficiaries of the nonprofit you love, as seen here in this [thank you video from the Boys and Girls Club of the Valley](#).



Example video celebrating donor's birthday via email

If Ball State University knows your birthday and email address, then every year, whether you are an alum, a parent, a professor, or a vendor, you're sent a [special happy birthday video](#). This ingenious thoughtful touch instantly connects the viewer with the sights and sounds of their beloved campus.





Celebrating the anniversary of a donor's first gift

You know what holiday your donors are unaware of but that if celebrated, instantly reminds them of how much they love your cause and that you may be one of their top philanthropic priorities? The anniversary of their first gift to you! The “donoriversary” is one of the lowest-hanging fruit ways to digitally delight your donors. Whether they've been supporting you for 6 months, 1 year, 5 years, or more, it's a great way to let them feel seen, loved, and appreciated by you.

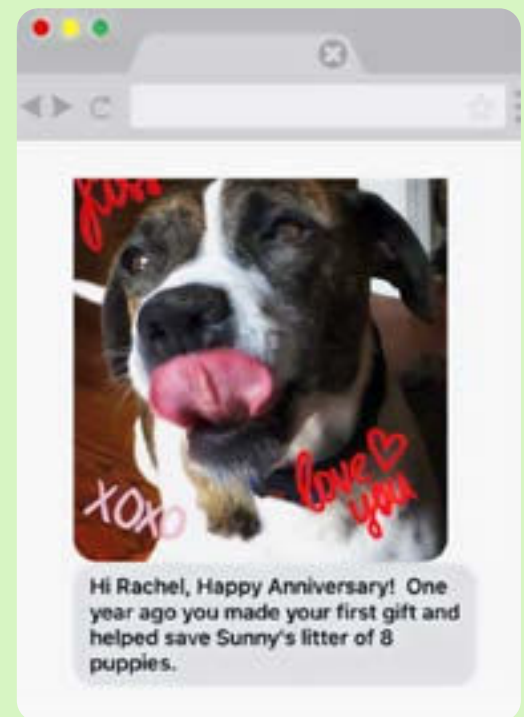
Postcard example celebrating “Donoriversary” - anniversary of a donor's first gift



Front



Back



Text example

Conclusion

If you've made it this far, take a deep breath—you're ready.

Automation isn't about replacing the human touch. It's about making your warmth, gratitude, and thoughtfulness more consistent, timely, and scalable. It helps you show up for more donors in more meaningful ways, without running yourself ragged. The heart of fundraising will always be relationships. Automation can help you nurture those relationships so nothing falls through the cracks, even on your busiest days. Start simple. Lead with love. And remember: you're not automating gratitude, you're delivering it—right on time, every time. You've got the heart. You've got the know-how. And now, you've got the tools. Go make some magic!



Fundraising and donor management software **BUILT** for **PURPOSE.**



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