

Active Listening Meets AI: Humanizing Fundraising Strategies



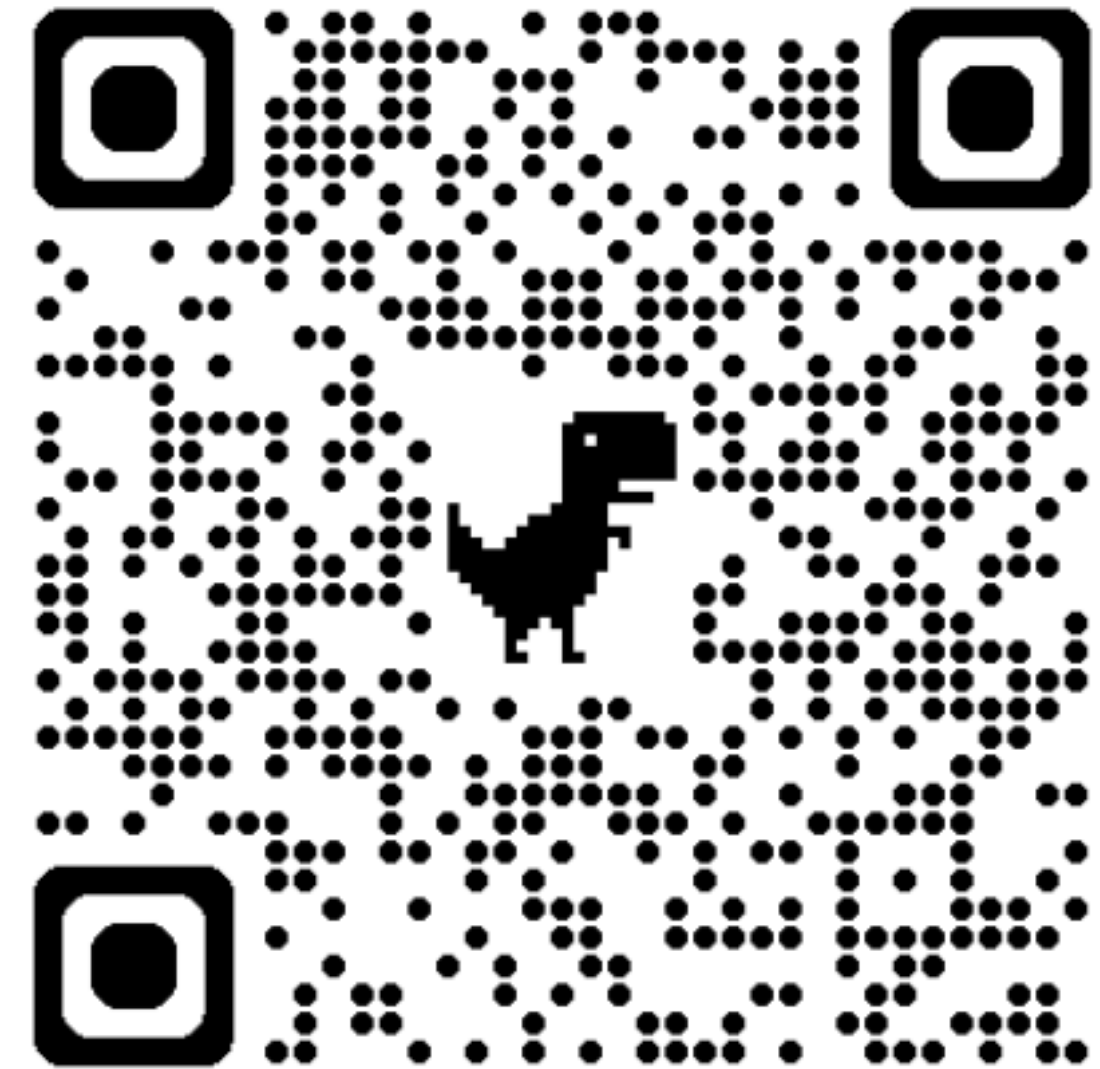
Meet the speaker



Frank Mumford, CFRE

Head of Strategic Partnerships
Gravyty

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Agenda

- ☒ Recent Donor Engagement Survey
- ☒ AI and Fundraising
- ☒ Solutions and Ideas
- ☒ Wrap-up

The survey

Audience

Fundraising professionals from higher education, K-12 and NPO institutions around the world

Response

140+ respondents

Topics

Shifts in donor preference, the rise of AI and automation, donor pipeline development

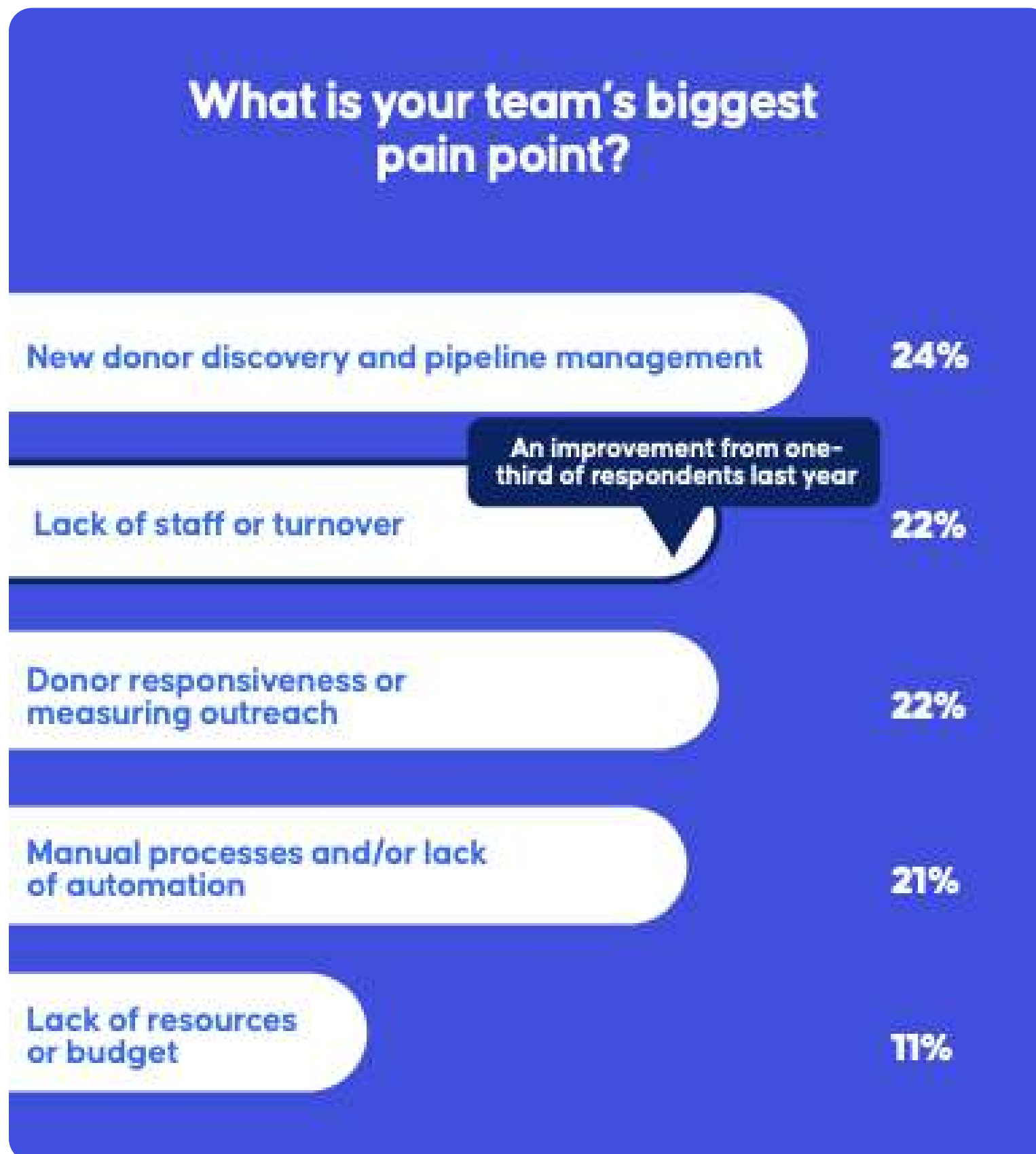
Type of organization



Key Metrics Importance Ranking

Metric	2024 level of importance ranking	2025 level of importance ranking
Dollars raised	#1	#1
Donor retention	#2	#2
Total number of gifts	#9	#3
Average gift size	#8	#4
Donor upgrade	#4	#5
Engagement metrics	#3	#6
Qualify for major gifts	#5	#7
Number of contacts per year	#7	#8
Number of visits per year	#6	#9

What are teams struggling with

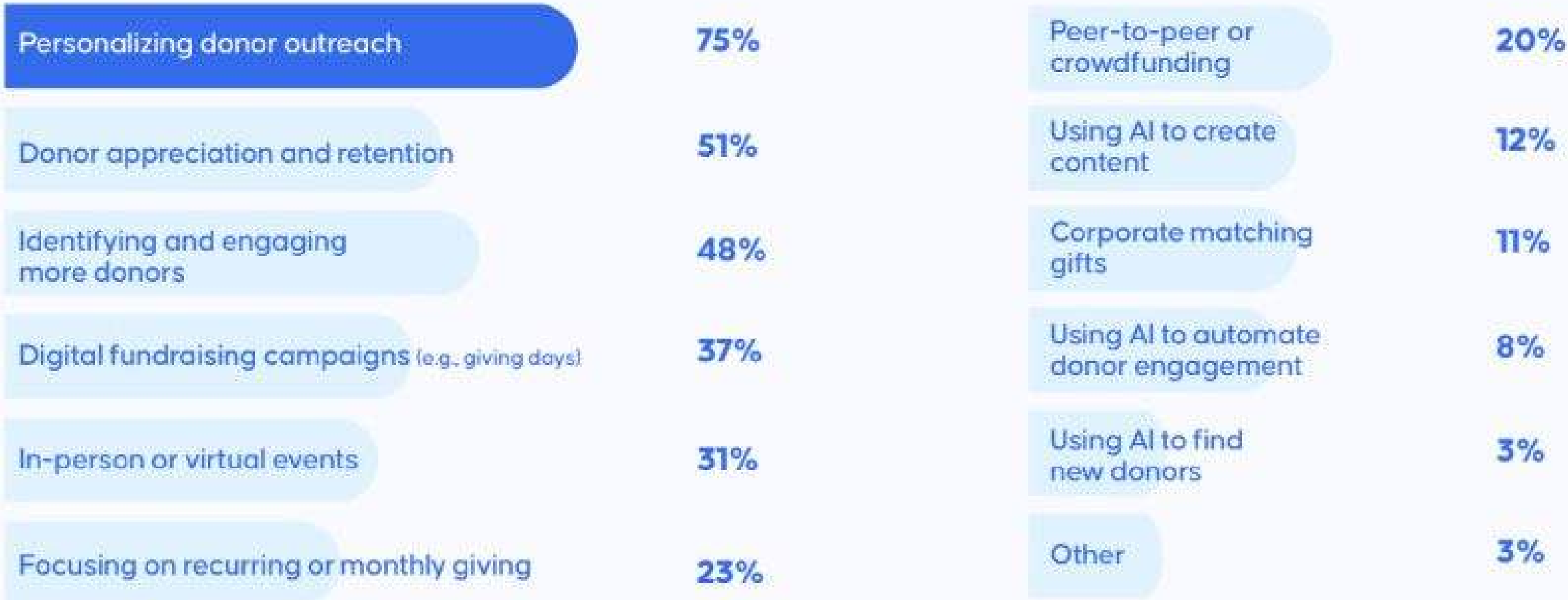


Teams struggle with donor discovery and pipeline management, but there are improvements with staffing and resources.

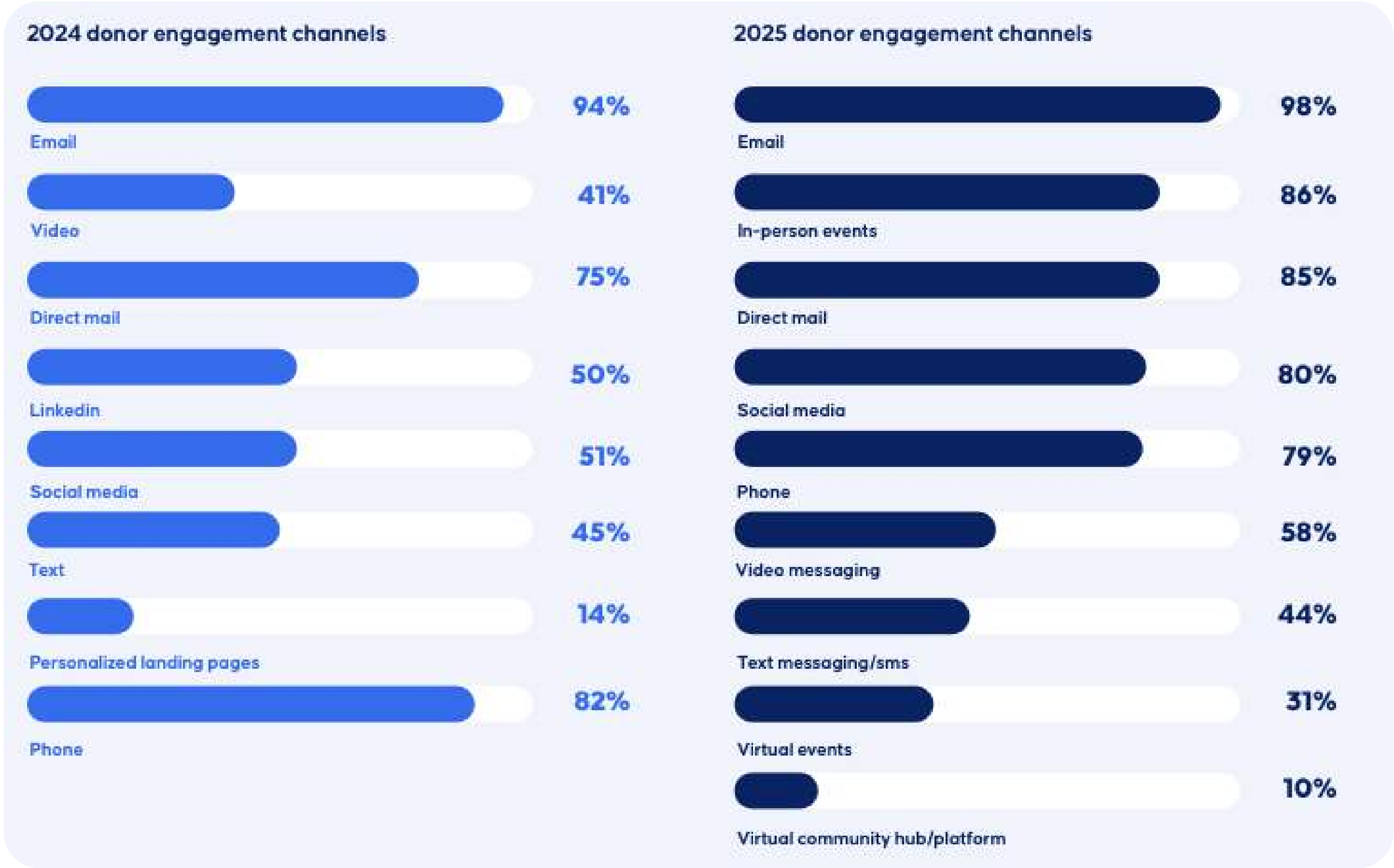
What are you seeing?

Fundraising Strategy

What was the most effective fundraising strategy your team implemented in the last year?



Donor engagement channels

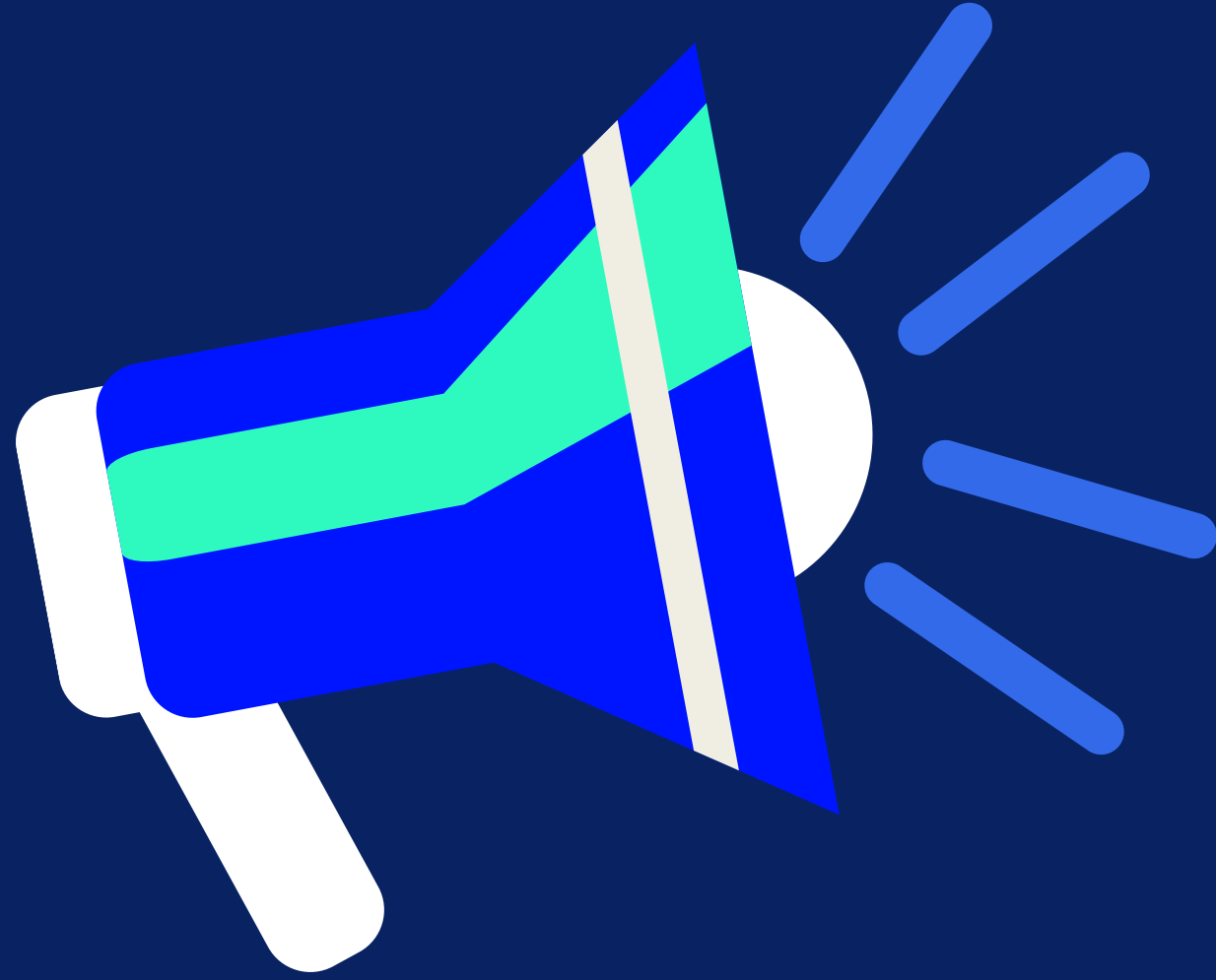


AI and Fundraising

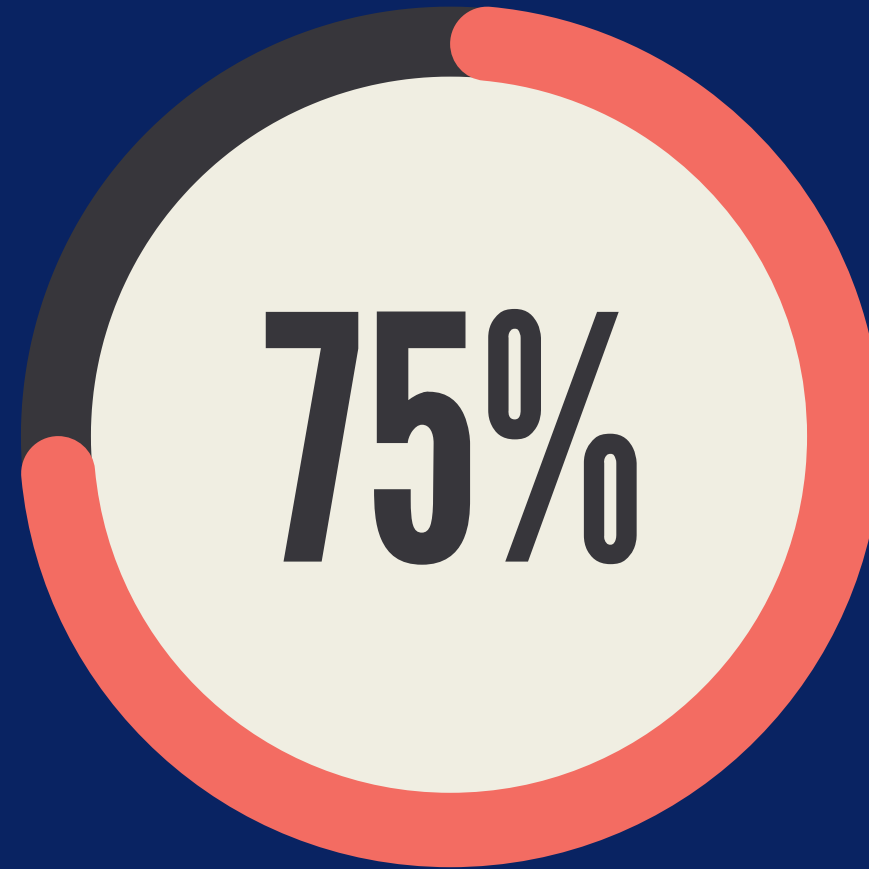


How often do you use AI tools?

Who is using it?

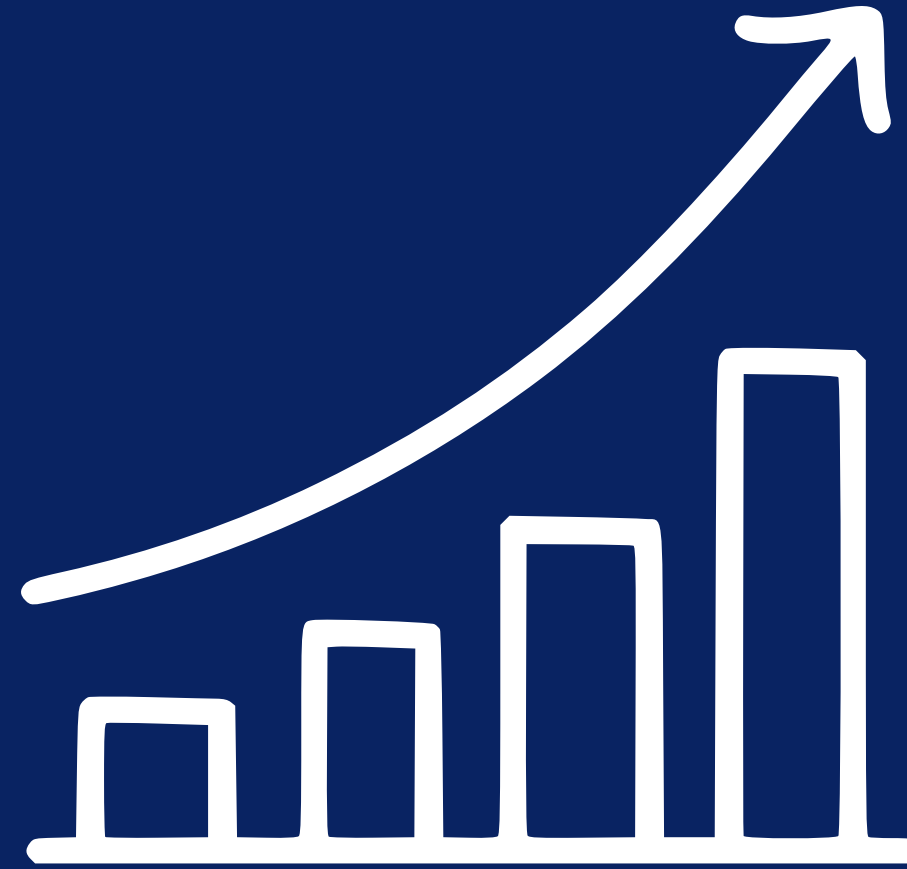


Importance of AI



**of generative AI users are
looking to automate tasks at
work and use it for work
communications**

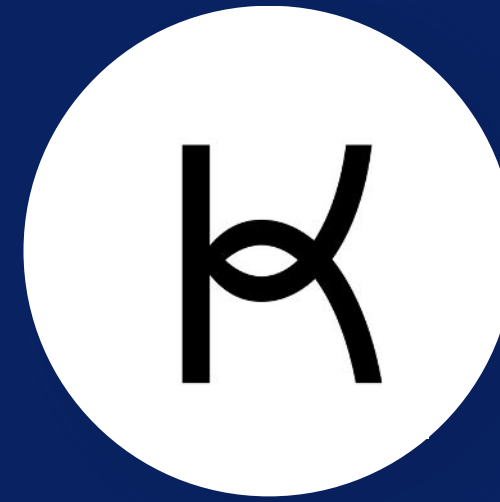
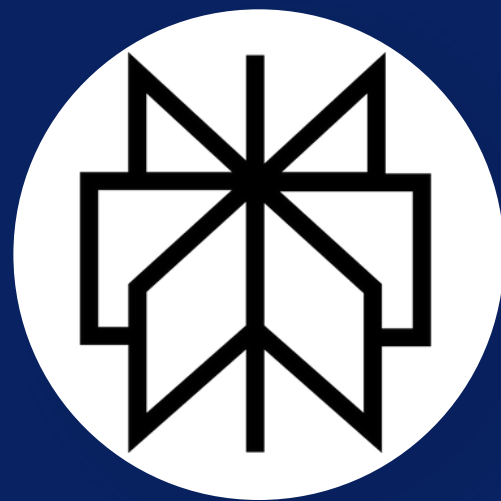
Salesforce report-Top AI stats for 2023



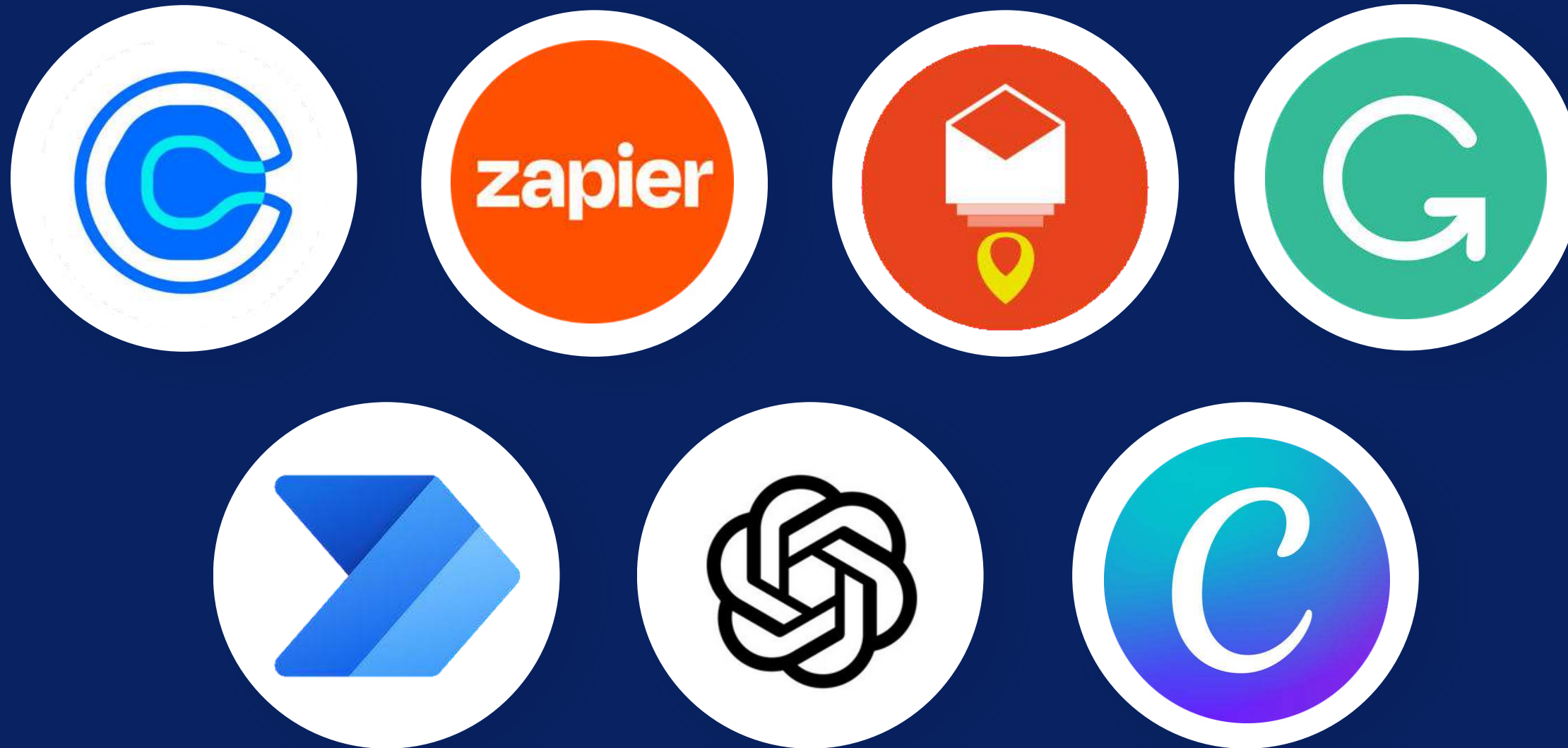
**Access to the chatbot ChatGPT
decreased workers' time to
complete tasks by 40 percent.**

MIT News-Study finds ChatGPT boosts worker
productivity for some writing tasks

AI Tools



Other Tools



The need

Using technology
to stay on task,
build authentic
relationships,
and prioritize



Solution #1

Reducing manual and administrative tasks allows time for more **personalized stewardship, outreach, and appreciation**

6+ hours

Time saved per week if repetitive workplace tasks were automated
Source: McKinsey Global Institute



Forty-four percent of donors would give 10% more if their **communications were personalized**



66%

For millennials, that numbers jumps to an even more impactful 66 percent

** Charity Digital-Why Personalisation is Key*

71%

of donors said personalization makes them feel more engaged.



The Nonprofit Times, Donor Loyalty study

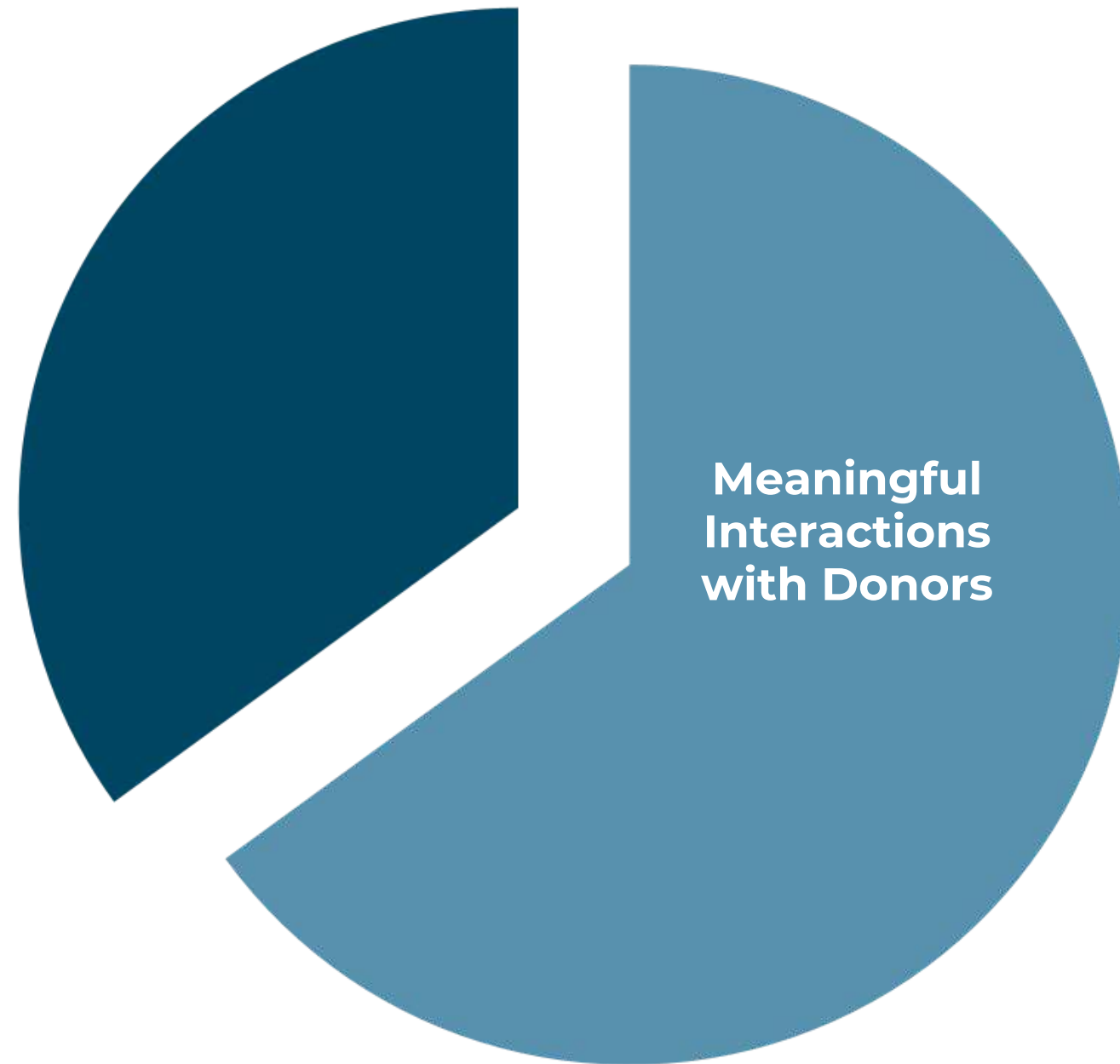
93%

**would definitely or probably
give again to charity that
provided a prompt and
personal thank you**

Penelope Burke-Donor Centered Fundraising



The #1 challenge fundraising teams face is... the **lack of time prioritization**



What if you could **double** or **triple** your output **without** adding additional work or time?

Raise First Draft

First Draft

Hi Grace,

I hope all is well with you. I wanted to find out if you might be free to be my guest for lunch or dinner sometime in February?

I know you've been a generous supporter of Gravyty and I'd love to tell you about some of the wonderful things happening at the organization.

Please let me know if there is a day and time that might work best for us to connect. 'Asian Kabab & Grill' on Massabesic St looks like a great place near you where we could meet for lunch or dinner.

Thank you again for your support and I look forward to talking with you soon.

Kindly,
Don

EDIT FIRST DRAFT



First Draft - Grace Murach



My Raise

Analytics

Portfolio Coverage



In Cultivation
adam@gravyty.com
[\(753\) 908-6238](tel:(753)908-6238)
CRM ID: 562684

Last Gift \$249,449
Lifetime Giving \$868,344
Last Action None
Number of Gifts 40

DELETE PHOTO

Your Raise Activity

	Sent	Follow Ups Set	Other Actions	Gifts
This Week	26	10	10	4
Last Week	17 ▲ 52%	6 ▲ 66%	13 ▼ -23%	1 ▲ 300%

Why Grace Murach?

Major Donor High Charitable Giving In Zipcode

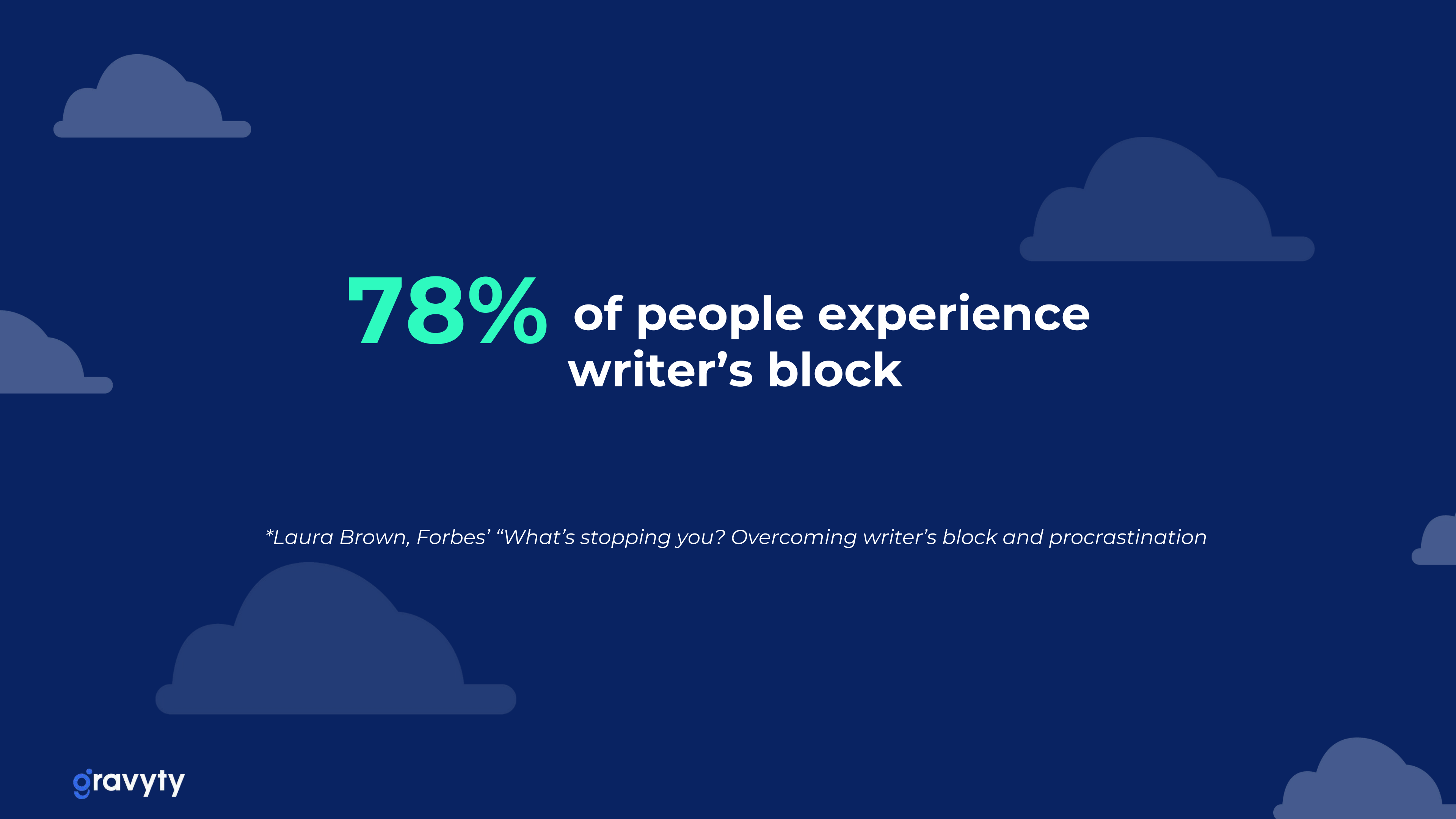
Don,

Grace Murach is a major donor with lifetime giving of \$868,344 to Gravyty. Most recently, on July 2, 2024, Grace made a \$249,449 gift. Her latest largest gift of \$249,449 was made on July 2, 2024.

Grace lives in New York, NY. Now might be a great time to set up a dinner or lunch meeting. We have suggested a meeting at Asian Kabab & Grill, which you can learn more about [here](#).

Raise drafted the below email to Grace on your behalf. This donor is in your Primary portfolio. If you'd prefer to call, her number is [\(753\) 908-6238](tel:(753)908-6238).

You could also connect with Grace on social media.

The background is a solid dark blue color. Scattered across the background are several stylized, light blue cloud shapes of varying sizes and positions. Some are in the top left, some in the top right, and some in the bottom left and bottom right.

78% of people experience
writer's block

**Laura Brown, Forbes' "What's stopping you? Overcoming writer's block and procrastination"*

Solution #2

Storytelling can show impact, appreciation, and build trust

59%

Of fundraisers surveyed said impact stories drove the most donor engagement.
Engagement = Retention



Video outperforms.





**One minute of
video is worth 1.8
million words.**

The data

People retain
**95% of what they
watch** vs 10% of
what they read



CRM Integrations



and more...

Solution #3

Thoughtful and
retention-minded
portfolio handoffs.



No. 1

Reason people stop giving is because of poor communication around their gifts. Couple this with a disjointed experience with a singular staff, and you have a recipe for low retention.

Donor engagement survey snapshot

A CLOSER LOOK

The untapped potential of process

Just 10% of teams say their portfolio handoff process is smooth, and a staggering 42% of teams say they have no formal process at all. Related, a majority (58%) of teams don't have a set number of contact attempts before disqualifying a prospective donor. This highlights an opportunity for fundraising teams to streamline and scale pipeline building activities through internal processes and workflows.



Video works well
for **portfolio
handoffs**, too.

72%

Of business leaders think
effective communication have
increased their team's
productivity

*Source: McKinsey Global
Institute*



“Building trust is a process. Trust results from consistent and predictable interaction over time.”

Barbara M. White

Why Gravyty?

1. Time is our most precious resource
2. Hiring and onboarding is expensive
3. Hidden gems in your database

What is Gravyty?



Our AI platform is:

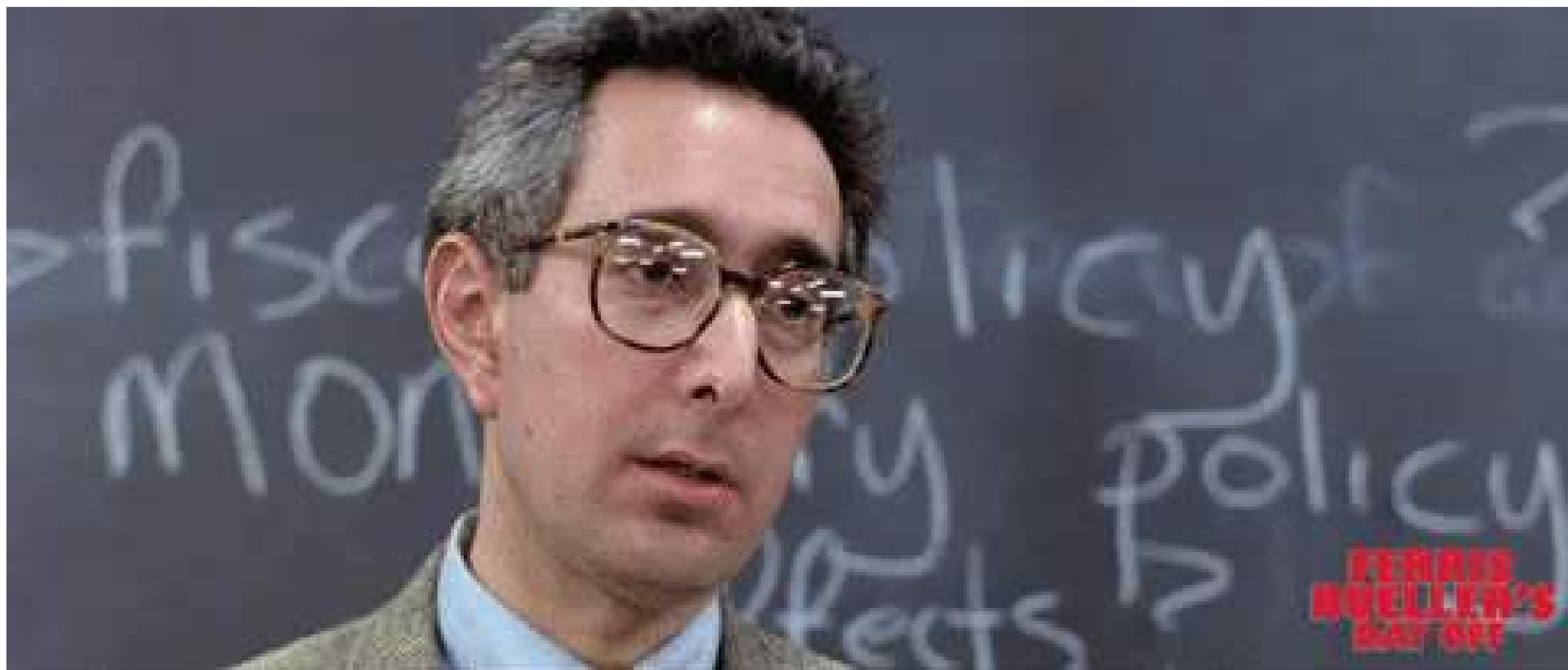
1. Enclosed patented AI-based technology
2. Automate & streamline portfolio workflows
3. Integrated into your inbox and CRM



Our video platform is:

1. Simplified video outreach for 1:1 & 1:Many
2. Sent via email or text
3. Provides highest impact in the shortest time

**WHO LIKES
LOGGING
ACTIONS?**





Those exceeding their fundraising goals during the past year rated the data quality within their organizations' CRM system higher than those respondents who reported falling short of their fundraising goals.

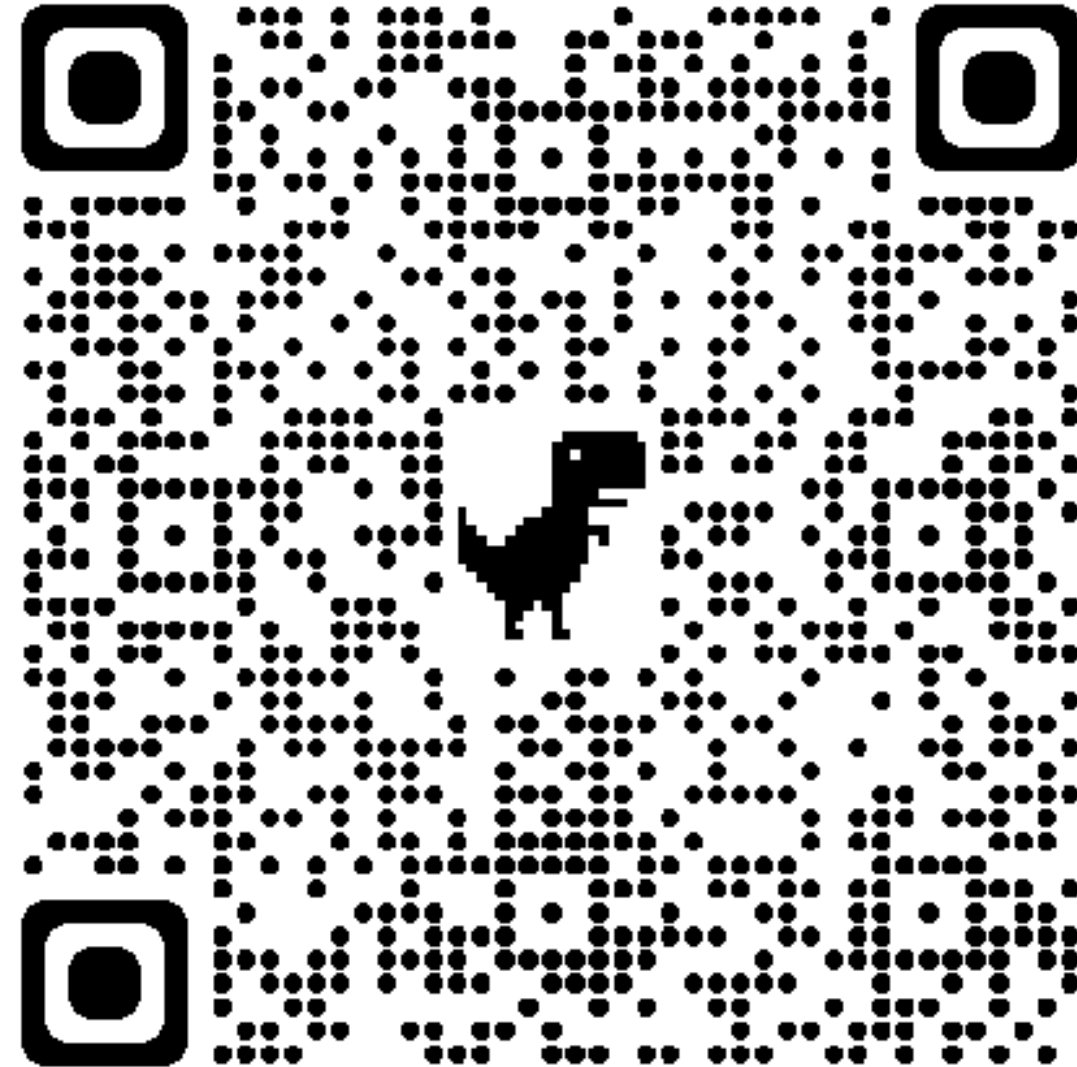
AFP Global-How Are Fundraisers Spending Their Week?



**"When the well is dry, we
know the worth of the
water."**

BENJAMIN FRANKLIN

**Send me a
sample &
the report**



Thank you!



Frank Mumford, CFRE

Head of Strategic Partnerships
Gravyty

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