

DONOR SUCCESS

DONOR CULTIVATION TOUCHPOINT PLANNER

A working template for planning intentional donor relationships - not random communication.

PLAN → PERSONALIZE → CONNECT → FOLLOW UP → LEARN

**The goal is not more touches.
The goal is more meaningful touches.**

Grow Donors. Grow Giving. Grow Impact.

Cultivation should be intentional.

Donor relationships rarely weaken because an organization does not care. They weaken because cultivation becomes reactive - a thank-you here, an event invite there, then another ask when the campaign starts.

This planner gives your team one place to decide who needs attention, why the touch matters, what should happen next, and who owns it.

STEP	PRINCIPLE	WHAT IT MEANS
1	Start with the donor	Plan around relationship needs and interests, not your internal calendar.
2	Give every touch a purpose	Gratitude, impact, listening, engagement, connection, solicitation, or follow-up.
3	Mix channels	Calls, email, handwritten notes, meetings, events, video, text, and mission experiences.
4	Capture what you learn	Every interaction should make the next interaction smarter.
5	Always define next best action	A touchpoint without a next step becomes activity instead of cultivation.

Donor Relationship Snapshot

Complete this before planning the touchpoints. If you cannot answer these questions, the first cultivation goal may simply be to learn.

Donor / Household / Organization:

RELATIONSHIP AREA	WHAT WE KNOW

Suggested areas: connection to mission, giving history, interests, communication preference, relationships to board/staff, recent engagement, known capacity or opportunity.

Set the Relationship Goal

Cultivation is not a collection of random touches. Define what a stronger relationship would look like over the next 30, 60, or 90 days.

Current relationship status:

What do we want the donor to know, feel, or experience?

What would meaningful progress look like?

Primary objective: ■ Gratitude ■ Learn ■ Show Impact ■ Engage ■ Deepen ■ Re-engage ■ Prepare for Ask

90-Day Donor Cultivation Plan

Plan fewer, better interactions. Each touch should have a clear purpose and should build on what came before it.

DATE / WINDOW	PURPOSE	TOUCHPOINT	CHANNEL	OWNER	NEXT STEP

Ideas: personal thank-you, impact update, handwritten note, mission tour, coffee, program visit, donor story, leadership introduction, volunteer opportunity, event invitation, listening call, campaign update, board member outreach.

The Seven Purposes of a Donor Touch

THANK Express gratitude with no ask attached.	LEARN Understand motivation, interests, experience, preferences, and aspirations.
SHOW IMPACT Connect generosity to meaningful outcomes and mission progress.	CONNECT Build a stronger human relationship with staff, leadership, board, or community.
ENGAGE Invite participation in the mission beyond giving.	ASK Present a thoughtful giving opportunity when the relationship and timing support it.
FOLLOW UP Close loops, keep promises, answer questions, and demonstrate reliability.	

If every touch in your plan is an ASK, you do not have a cultivation plan. You have a solicitation calendar.

Monthly Portfolio Planner

Use this page at the beginning of each month to identify which donor relationships need proactive attention.

DONOR	HEALTH / STATUS	WHY NOW?	ACTION THIS MONTH	OWNER	DUE

Donor Meeting Prep Sheet

Donor:

Purpose of this meeting / call:

What we know about the donor:

Three questions we want to ask:

One story / impact point that may be relevant:

Possible next best action:

Donor Interaction Debrief

The value of a donor conversation is not just what happened in the meeting. It is what your team learns and does next.

CAPTURE	NOTES

Capture: interests, concerns, personal details volunteered, mission connection, questions, commitments we made, engagement signals, giving signals, and next action.

ARE WE BUILDING A RELATIONSHIP OR JUST COMMUNICATING?

Cultivation Balance Check

Review the last 90 days of touches. Count how many fall into each category.

PURPOSE	COUNT	HEALTHY QUESTION
Thank		Have we expressed gratitude beyond the receipt?
Learn		Have we asked and listened?
Show Impact		Have we demonstrated what generosity makes possible?
Connect		Has the donor had meaningful human interaction?
Engage		Have we offered a way to participate?
Ask		Are asks proportionate to stewardship?
Follow Up		Did we close the loops we opened?

Watch for: too many asks, long silence, only mass communication, no listening, no personal ownership, or repeated touches that ignore what the donor already told you.

15-Minute Donor Cultivation Huddle

A simple weekly or bi-weekly huddle keeps high-priority donor relationships moving without creating another long meeting.

MINUTES	QUESTION
0-3	Which donor relationships changed since our last huddle?
3-6	Who needs attention because of risk, silence, or a missed commitment?
6-9	Where do we see an engagement or giving opportunity?
9-12	What are the next best actions, and who owns each one?
12-15	What support, introduction, content, or leadership help is needed?

Leave the huddle with names, actions, owners, and dates - not general discussion.

PUT IT INTO ACTION

Make every touch earn the next conversation.

Donor cultivation is not about staying busy. It is about intentionally strengthening trust over time.

Plan around the donor. Give each touch a purpose. Personalize where it matters. Capture what you learn. Follow through on what you promise. Then use that intelligence to choose the next best action.

The best donor cultivation plan does not make a donor feel managed.

It makes them feel known.

READY TO PUT DONOR CULTIVATION INTO A REPEATABLE SYSTEM?

Donor Success helps nonprofit teams understand donor health, organize relationship activity, identify risk and opportunity, and know what to do next.

Visit donorsuccess.com to learn more or book a Donor Growth Assessment.

Grow Donors. Grow Giving. Grow Impact.