

# TRANSFORM

YOUR FUNDRAISING

## From Transactional to Transformational:

### 5 Steps to Human- Focused Fundraising

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power  
partners  
FORMULA™



/ COMMUNITY CONFERENCE

Being transactional  
does not equal  
talking about \_\_\_\_\_.

What is the difference?

***Transactional***

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***Transformational***

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# Step 1

## UNDERSTAND YOUR DONORS

To truly understand your donors, nonprofits have to stop using a blanket approach to outreach and inquiry. Identifying specific identities and alignment within your donor segments can help you tailor outreach for maximum impact.

There are three important parts of this process:

### **Activating Empathy** *(design thinking)*

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### **Putting on donor lenses**



### **Getting curious**

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*Bonus*

In season 1 Episode 6 of my podcast "What the Fundraising" my friend Dulari Gandhi discusses the funder lens for foundations in particular!

# Step 2

## SEGMENT DONORS BY PERSONAS AND ALIGNMENT

***You can create donor segments based on:***

- Giving levels
- Giving frequency
- Giving recency
- Event attendance
- Campaigns funded

How does segmenting by campaign help you focus on alignment?

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# Step 3

## CREATE AN IMPACTFUL COMMUNICATIONS CALENDAR

**You are not sending emails to JUST send emails.**

**EVERY** communication & piece of content needs a  
clear \_\_\_\_\_

*Your content should....*

1. Build Community & Belonging

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\_\_\_\_\_

# Step 3 *Continued...*

## CREATE AN IMPACTFUL COMMUNICATIONS CALENDAR

2. Keep your community problem-aware

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3. Make people feel hopeful

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### *Bonus*

DonorPerfect has a suggested timeline for donor communication in their donor retention toolkit find it and more at [www.DonorPerfect.com/resources](http://www.DonorPerfect.com/resources)

# Step 4

## BUCKET YOUR TIME AND STREAMLINE

### *Context Switching Defined*

The process of stopping work in one project and picking it back up after performing a different task on a different project.

**I suggest you bucket your time based on these three things:**

**1.**

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**2.**

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**3.**

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### *Bonus*

I go over context switching and other tips to Raise More Money WITHOUT Hounding Donors in my free Masterclass. Sign up now at [www.MalloryErickson.com/DonorPerfect](http://www.MalloryErickson.com/DonorPerfect)

# Step 4 *Continued...*

## BUCKET YOUR TIME AND STREAMLINE

### Create 1-2 time blocks for yourself

|               | SUNDAY | MONDAY      | TUESDAY     | WEDNESDAY   | THURSDAY    | FRIDAY      | SATURDAY |
|---------------|--------|-------------|-------------|-------------|-------------|-------------|----------|
| 09:00 - 09:45 | OFF    |             |             |             |             |             | OFF      |
| 10:00 - 10:45 | OFF    |             |             |             |             |             | OFF      |
| 11:00 - 11:45 | OFF    |             |             |             |             |             | OFF      |
| 12:00 - 13:15 | OFF    | ✓ Free time | ✓ Free time | ✓ Free time | ✓ Free time | ✓ Free time | OFF      |
| 13:30 - 14:15 | OFF    |             |             |             |             |             | OFF      |
| 14:30 - 15:15 | OFF    |             |             |             |             |             | OFF      |
| 15:30 - 16:15 | OFF    |             |             |             |             |             | OFF      |

### Bucket your time by type of funder, segment, and alignment

*Hot Tip*



Maximize your energy by giving yourself double the time that you think you need to do the task!

*Mallory Erickson*  
malloryerickson.com



# Step 4 *Continued...*

## BUCKET YOUR TIME AND STREAMLINE

**What can you automate in your CRM so that you can focus on human-centered donor engagement?**

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### *Bonus*

To make the most of your time watch my Fundraising Tips and Tricks video on YouTube: Starting your day with success. <https://youtu.be/2huc7Pk5EI8>

# Step 5

## REVIEW & ITERATE

**What holds you back from reviewing and iterating on your data? (Honestly!)**

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**What are some ways you can overcome the barriers mentioned above?**

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*Hi, I'm Mallory!*

I am a certified executive coach and fundraising consultant that specializes in helping social impact fundraisers apply life-changing scientific research and personal development frameworks to their fundraising work.



I am the creator of the Power Partners Formula™, a course whose brave, bold, and innovative framework teaches nonprofit fundraisers to raise more from the right funders so they can stop hounding people for money. Fundraising doesn't have to be uncomfortable when it is built around a win-win framework and authentic partnerships.

I'm also the host of the new podcast What the Fundraising, where I invite and interview authors, researchers, Ted Talk speakers, and more from outside the nonprofit sector about their areas of expertise. I then break down how we can take their knowledge and apply it to the work we do as fundraisers.

## **FIND ME**

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