

Pipeline Worksheet

A pipeline is a set of repeatable steps that your development team follows to convert new contacts into donors. Use this worksheet to standardize your efforts and build a roadmap for your success.



INSTRUCTIONS

- Write down the key activities, milestones, and decisions that **need to take place** throughout the course of every relationship.
- Choose a series of **stages** to support that process—between 3–7, depending on the complexity of the relationship. Typical stage names include:
 - Prospect
 - Propose
 - Make Contact
 - Get Signature
 - Qualify
 - Receive Payment
 - Research
 - Check-In
 - Pitch
 - Re-Engage

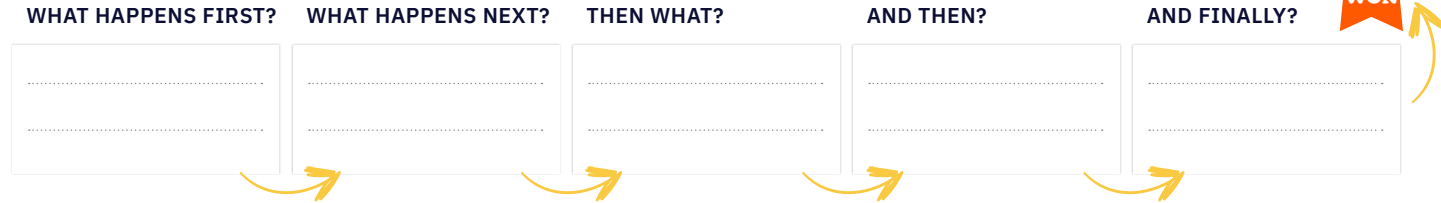
Note: Each stage should have a **goal** that must be completed before the lead moves forward. What's the specific action or agreement that must be reached in each stage?

- For each stage, **list the tasks** that your development team must complete to accomplish the stage goal. Some typical tasks include:
 - Call potential donor
 - Send informational material
 - Prepare for meeting
 - Collect information for proposal
 - Send gift packet
 (see: [follow-through tasks](#))

Optional: Do you assign fundraising leads to your team members based on territory, value, or other criteria? **Think about the rules** you currently use to distribute each new lead to the person who's most likely to close it. (You can automate these rules in Nutshell.)

Pro Indicates a feature only available in Nutshell Pro

Your Donor's Decision Process



Your Sales Stages (aka Your Pipeline)

*To add pipeline stages, lead assignments, goals, tasks, and automated email sequences in Nutshell, go to your [Sales Automation](#) page



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