

Major Donor Prospecting Made Easier with Sales Hub

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Sales is evolving - nonprofits
must keep up

Major Trends

Nonprofits can't ignore

- Outbound is smarter, not louder
- The buyer (or donor) journey is self-directed
- AI and automation are driving efficiency
- Sales and marketing alignment is non-negotiable

HubSpot can help your
nonprofit adopt these best
practices

Laura

Major Gift Officer, Ocean Lovers
Portfolio of 150 donors
Gifts \$10,000+



When Laura was on Raiser's Edge

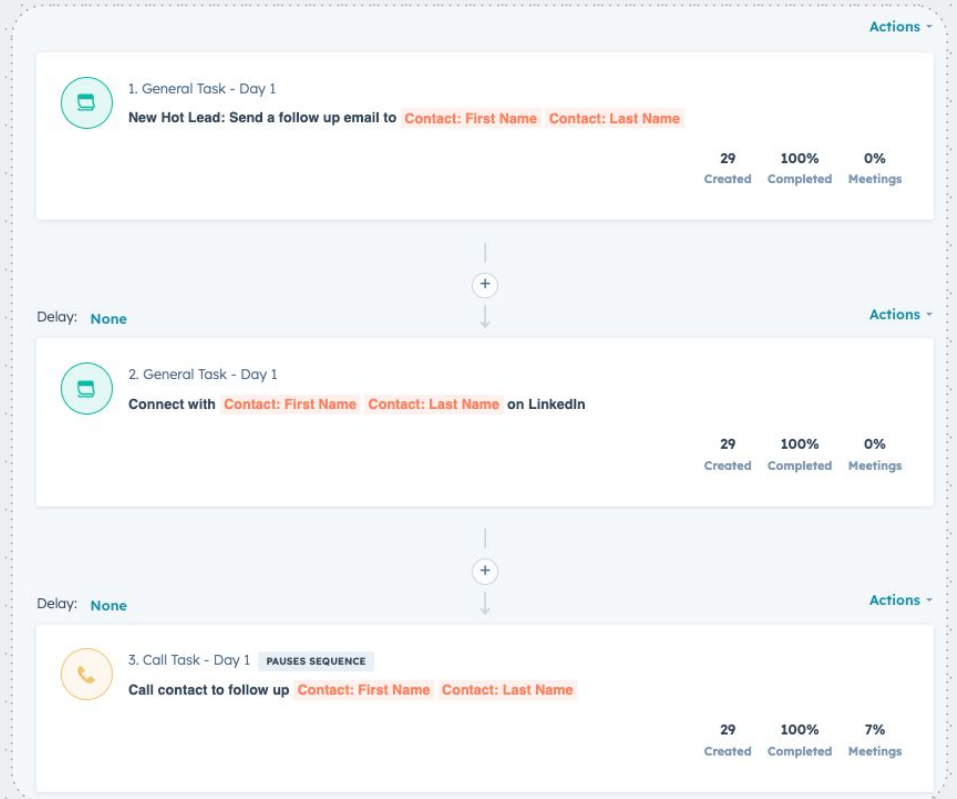
She felt frustrated

- Her donors were often included in mass market appeals
- Documenting moves management was cumbersome
- She never knew who to focus on

Let's follow Laura as she
heads to NYC powered
by HubSpot

Two Weeks Out

Laura prepares a sequence and enrolls warm prospects, four donors and two prospects agree to meet, including Jack.



Two Weeks Out

She's able to see that Jack attended last quarter's call with the program team

The screenshot displays the HubSpot CRM interface for the 'Prospecting' module. At the top, a navigation bar includes 'Contacts', 'Conversations', 'Marketing', 'Sales', 'Service', 'Automation', and 'Reports'. Below this, the 'Prospecting' section has tabs for 'Summary', 'Leads', 'Schedule', and 'Feed'. The 'Leads' tab is active, showing a total of 21 leads. There are four summary cards: 'New leads (3)' with a 'Reach out to new leads' button, 'Attempting (11)' with a 'Follow up with leads' button, 'Connected (2)' with a 'Follow up with leads' button, and 'Bad timing (3)' with a 'Follow up with leads' button. Below these cards is a table of individual leads with columns for 'LEAD', 'TAGS', 'COMPANY', 'STAGE', 'LAST ACTIVITY', and 'NEXT ACTIVITY'. The table lists five leads: Daisy Jones (New), Taylor Swift (New), Jimmy Hurdstrom (New), Dwight Schrute (Attempting), and Bruce Wayne (Attempting). Each lead entry includes a checkbox, initials, name, company, stage, last activity, and a 'Schedule Next Activity' dropdown.

LEAD	TAGS	COMPANY	STAGE	LAST ACTIVITY	NEXT ACTIVITY
<input type="checkbox"/> DJ Daisy Jones		TS The Six	New		Schedule Next Activity
<input type="checkbox"/> TS Taylor Swift		..	New		Schedule Next Activity
<input type="checkbox"/> JH Jimmy Hurdstrom		JH Yellowstone Ranch	New		Schedule Next Activity
<input type="checkbox"/> DS Dwight Schrute		DS Dunder Mifflin	Attempting	You sent an email	Schedule Next Activity
<input type="checkbox"/> BW Bruce Wayne		..	Attempting	You sent an email	Schedule Next Activity

Two Weeks Out

She notices that he visited the landing page for planned giving, but didn't open the follow-up email that was sent automatically

The screenshot shows a HubSpot CRM contact record for Daisy Jones. The contact is associated with 'The Six' and has the email address 'alozano+4@hubspot.com'. A red banner indicates 'ENROLLED IN A SEQUENCE'. The 'Emails' section shows one email: 'Follow up with Daisy', created on Jul 20, 2023, with a status of '0 of 1 completed'. The 'LAST CONTACTED' section shows an email sent on May 15, 2023, at 10:10 AM CDT. The 'LAST ENGAGEMENT DATE' is blank. The 'Leads' section shows an error message: 'Something went wrong loading this section. Please wait a minute and refresh the page and try again.' The 'Recent communications' section shows an email sent by Andi Lozano to Daisy Jones on May 15, 2023. The 'Notes' section is currently empty.

Two Weeks Out

She sees that Jack works at Microsoft, where they match contributions up to \$15,000 and Jack hasn't given this year



Two Weeks Out

Mary is tasked with prospect research

The screenshot shows the HubSpot Prospecting dashboard for a user named Beth Dutton. The dashboard is divided into several sections:

- Summary:** Shows task progress for various activities. Beth Dutton has completed 18 of 42 To-dos, 13 of 15 Emails, 12 of 21 Calls, and 25 of 25 LinkedIn tasks.
- Schedule:** Shows a timeline of tasks. At 8:00am, there are 77 tasks due today. At 9:00am, there is a task for Beth <-> John.
- Total tasks (128):** A summary of all tasks, including 78 tasks due today and 50 overdue tasks.
- Sequences (4):** Shows details for a sequence named 'Warm Lead', which has 23 contacts currently enrolled. Step 3 is 'Automated email'.
- Prospecting — Call heavy (23):** Shows details for a sequence named 'Prospecting — Call heavy', which has 31 contacts currently enrolled. Step 2 is 'Call task'.

One week out

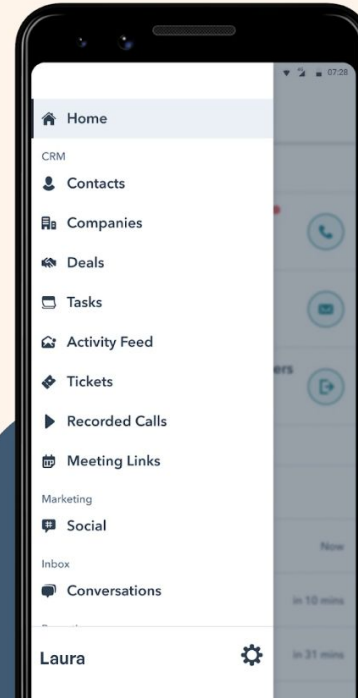
All six prospects are enrolled in a sequence designed to maximize their time with Laura

- A text is sent to Jack with an update on a recent legislation passed in NY to preserve public access in Rockaway Beach
- A confirmation email and reminder text are sent with meet up details
- A onesie is given to Laura along with a card for Jack

In NY

Laura creates a deal, logs the meeting, adds notes, sends a follow-up, and tasks Mary to mail Jack a handwritten note from her phone on the subway.

**All the power of HubSpot,
everywhere**



One week later

Laura sends Jack an email follow-up and easily logs it right from Gmail to HubSpot.

She creates a task for herself to follow-up next month.

Congrats & Upcoming Advocacy Opportunity



Recipients

Congrats & Upcoming Advocacy Opportunity

Templates Meetings Tasks Sequences More Log 0/0 Track
 Insert: Portland NHS Invite #3 ZI **Write an email for me**

Hey Jack,

Congrats again on the birth of your healthy baby! That's incredible news. I know the support you provide us will make a real difference for Chantel.

I also really appreciate you taking the time to meet with me in NY—it was great catching up.

We've got an upcoming fight in Albany to expand water testing along the NY coastline. I'd love to send you more info on ways to get involved. Sound good?

Looking forward to staying in touch!

Best,

Laura

4 weeks later

Moves management meeting

TOTAL DEAL AMOUNT	WEIGHTED DEAL AMOUNT	OPEN DEAL AMOUNT	CLOSED DEAL AMOUNT	NEW DEAL AMOUNT	AVERAGE DEAL AGE
\$190.28K	\$185.66K	\$20.93K	\$169.35K	\$0	517.4 days
Average per deal: \$10.57K	Average per deal: \$10.31K	Average per deal: \$3.49K	Average per deal: \$14.11K		

Search name or description <input type="text"/>							Board options <input type="button" value="v"/>
PROSPECTING	CULTIVATION	SOLICITATION	VERBAL COMMITMENT	PENDING APPROVAL	WRITTEN COMMITMENT	POSTED	
0	2	1	3	0	6		
	<p>Mccoy Inc - Major Gift Amount: \$1,489 Close date: 11/14/2024</p> <p>Corporate Sponsorship</p> <p> High Task 4 months ago ! No activity scheduled</p> <p>Kramer-Bennett - February Order Amount: \$1,681 Close date: 08/09/2021</p>	<p>Tom Brady - Major Gift Amount: \$3,132 Close date: 04/14/2022</p> <p>Corporate Sponsorship</p> <p> High Task 4 months ago ! No activity scheduled</p>	<p>Bill Schnepf Major Donor Potential Amount: \$5,000 Close date: 07/31/2024</p> <p>Corporate Sponsorship</p> <p> No activity for 8 months ! No activity scheduled</p> <p>Community Foundation of Western Massachusetts - Major Gift Amount: \$7,692</p>		<p>Evans PLC - Major Gift Amount: \$100,000 Close date: 12/14/2021</p> <p>Major Gift</p> <p> High</p> <p>Susan Quas - Major Gift Amount: \$5,000 Close date: 06/07/2023</p> <p> High</p>	<p>Kelsey Ingram - Major Gift Amount: \$5,000 Close date: 12/25/2021</p> <p></p> <p>The Red Sox Foundation - Major Gift Amount: \$3,684 Close date: 05/12/2021</p> <p></p> <p>Mccoy Inc - Major Gift</p>	
Total: \$0 Weighted: \$0	Total: \$3,170 Weighted: \$1,268	Total: \$3,132 Weighted: \$1,879	Total: \$14,631 Weighted: \$13,168	Total: \$0 Weighted: \$0	Total: \$132,359 Won (100%)	Total: \$36,984 Won (100%)	

6 week later

Laura sends Jack an email asking for a gift to support the water testing project.

He uses Fundraise Up to make the gift resulting in \$15,000 from Jack and \$15,000 from Microsoft.

Join Us in Expanding Water Testing – Your Gift Doubled!



Recipients

Join Us in Expanding Water Testing – Your Gift Doubled!

Templates Meetings Tasks Sequences More Log 0/0 Track
 Insert: Portland NHS Invite #3 ZI Write an email for me

Hey Jack,

I hope you're settling into life with a newborn—congrats again!

I wanted to follow up on our conversation about expanding water testing along the NY coastline. This is a critical moment in our advocacy efforts, and we have a big opportunity to make an impact.

Microsoft offers a 1:1 matching gift program, and with your support, we can unlock those funds to help drive this initiative forward. A \$15,000 gift from you would be doubled through Microsoft's program, providing \$30,000 to fuel our fight in Albany.

This funding will help us mobilize local voices, push for stronger legislation, and ensure that water quality testing becomes a priority along the coastline. With the legislative session heating up, now is the time to act.

Would you be open to making this gift and submitting the match through Microsoft? I'd love to chat if you have any questions.

Appreciate you considering this, Jack—your support means the world.

Best,

Laura

Twelve Weeks Out

Laura notices that two of the prospects she met in NYC have not engaged with any of her follow-up.

- She disqualifies the lead
- She enrolls them in a re-engagement sequence to fire off in six months
- She subscribes them to program updates from the marketing team

*With **HubSpot**, Laura isn't just fundraising - she's building lasting donor relationships using proven **for-profit tactics**.*

Thank you!



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