toucantech

DONOR PIPELINE

Use the ToucanTech fundraising donor pipeline to make sure you reach your fundraising goals, by visualizing your progress and tracking your donors, pledges and funds, all in one simple tool integrated with your database.

WHY is it brilliant?

Close stewardship of your donor relationships is fundamental to meeting your fundraising goals. A donor pipeline lets you see the current status of your donor universe and helps keep you on track towards your development targets, highlighting which relationships need which activities to nurture them through the stages of their giving journey. Using ToucanTech's highly sophisticated donor pipeline tool, you can:

1. Review your entire fundraising progress at a glance, with a bird's eye view of how much capital is sitting at each stage, when you hover each stage of the pipeline
2. Log your interactions and drag and drop donors into stages of your pipeline, and check out notes from previous stages to create a tailored approach for your ask
3. Quickly add a potential donor to a pipeline either through their record or the fundraising section
4. Set up customized pipeline stages and their descriptions that you can reorder and tailor to your organisation processes
5. Export specific funds to check in on the progress, using filters to identify where you need to allocate capital or drive fundraising efforts
6. Export all the stages or only the current stage of a record's pipeline to get the most accurate picture of your campaign
7. Easily run filters to find out who has donated or pledged to each fund, and target them with personalized thank you notes or updates
8. Set up customised pipeline stages and their descriptions that you can reorder and tailor to your organization processes

WHO else is using this?

"ToucanTech is a game-changer for schools. We need a sophisticated CRM to track pledges and payments, alongside a communications platform for news, emails, mentoring and events – we've definitely made the right choice!"

Andy Whittall, Development Director, Tonbridge School

1 - Identify 14 ❓	2 - Research 6 ❓	3 - Prioritise 9 ❓	4 - Gift Request 7 ❓
£ 4,000.00	**£ 500.00**	**£ 100.00**	**£ 500.00**
ROGER GRIER	ANNA WOOD	HARRY BOLTON	ANNA WOOD
ANNA WOOD	HARRY BOLTON	JESS RICHARDS NOVAK	HARRY BOLTON
HARRY BOLTON	JESS RICHARDS NOVAK	KATHY LEE	JESS RICHARDS NOVAK
JESS RICHARDS NOVAK	SYDNEY STRANGER	EDWARD WINKLEBERRY	SYDNEY STRANGER
KATHY LEE	GERTRUDE ANDREYEVS	SYDNEY STRANGER	GERTRUDE ANDREYEVS
EDWARD WINKLEBERRY	SATVEER SINGH	KARLO MARKS	SATVEER SINGH
SYDNEY STRANGER		STEVEN HOPSKIN	KARLO MARKS
KARLO MARKS		CHARLIE EDDIE	
STEVEN HOPSKIN		GERTRUDE ANDREYEVS	
CHARLIE EDDIE			
GERTRUDE ANDREYEVS			
GREG PARTNER			
LEONA OJALA			
SATVEER SINGH			

GET STARTED!

How to start using the donor pipeline
You can activate your pipeline from the fundraising section within your admin portal. Find out more in the guide to setting up your donor pipeline.

Not yet a ToucanTech customer?
If you are interested in using a highly sophisticated fundraising database with inbuilt donor pipeline, CRM and email engine speak to our team to see how we can help, by emailing hello@toucantech.com or booking a demo here.