

The logo for KindCon 2025, featuring the word "KindCon" in a dark grey sans-serif font with "2025" in a smaller font size above the "on".

KindCon²⁰²⁵

Impactful Engagement

**Designing Prospect Development Flows
That Inspire Generosity at Every Level**





KindCon²⁰²⁵



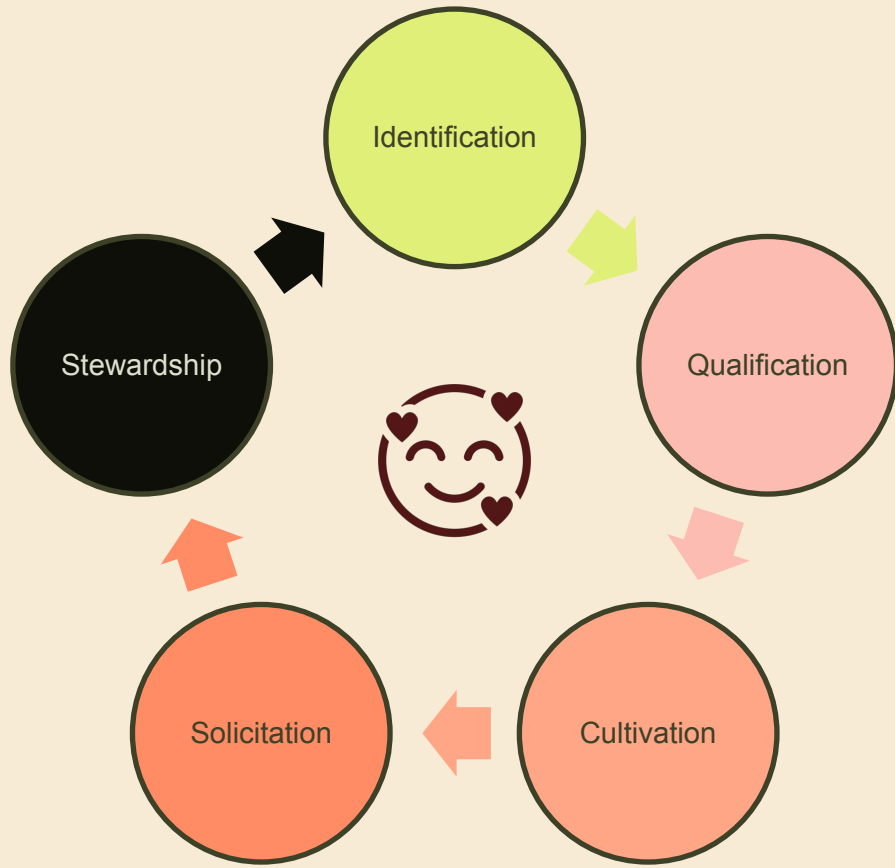
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Impactful Engagement

Every stage, at every level, should feel like a continuation of a relationship, not a transaction.



Using Data & Storytelling



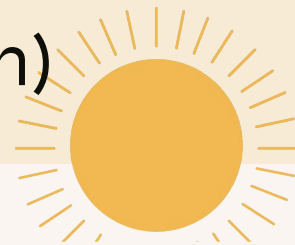


Prospects don't just fuel
the story, they are part
of it – build it with them.



Identification

Data & Segmentation (Research)



Wealth Data

Capacity ratings, giving & volunteer **history**, external **philanthropy**– all help you determine *from a data perspective* whether someone is a good prospect, & at which level



Predictive modelling

Build predictive models leveraging anything from a macro-enabled Excel, to machine learning, predictive modelling can help take out the guess work.



Engagement Scores

If you don't already have one, develop an engagement score. This tells you who's engaged, where there's work to be done, and can help track efforts to improve constituent engagement over time.



Interests

Being data protection compliant, record all interests and use them to help segment efforts in outreach

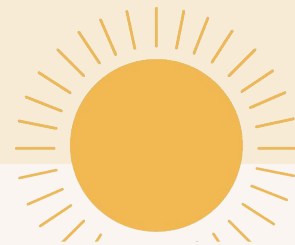


Prospects are people,
not statistics; their data
show characters, not
currency.



Qualification

Building the plot



Be transparent

At **every** level, be transparent about your efforts - *and* ensure that your efforts haven't just been about solicitation.



Know your institution & donors

Qualification is a bit like a job interview – it's not just whether or not the prospect might be a good donor, it's whether or not your institution matches their philanthropic wishes & interests.



Find the synergy

Ask questions that help determine where there's overlap in interest and impact between the institution and your donor.



Active Listening

Qualification is about **everyone** actively listening; from the prospect managers, to the annual fund callers. Role-play, practice, know your cues and clues.

Cultivation

The story takes shape



Build on connection

Nurture the seeds sown in qualification. Bring impact-driven stories that help shape and refine the synergistic cause (and amount!).



Leverage partners

Whether student volunteer callers, a peer, or Deans of departments of interest, prospects love being reminded of the community they're part of, & hearing from the sources themselves



Keep everyone informed

...including yourself! Let everyone know what's happening, from your teammates, to other teams in the department. Inform each other of successes and failures to better learn. Remain agile & know what you're talking about.



Record and reassess

Keep your data and records updated to ensure quick and accurate responsiveness, measurements, and predictions, as well as continuity.

Solicitation

The apex, not the drama



Be expected

By the time you ask, the prospect should expect it. It's the apex of the story, but shouldn't be dramatic in any way. Everything should feel like it's led to this point.



Share tales from the road

Storytelling doesn't just belong between the institution and constituents; share solicitation plans with peers, get/give feedback & implement learnings.



Do your homework!

Know where there is and isn't room for negotiation. Educate your prospect ahead of time of your institution's hard lines.



Solicitation pipeline

Every planned solicitation should be in the system. Average yield rates at every level (works less for PG), can help predict financial performance, but also, knowing what's coming and for what helps efficiency.

Stewards hip

The epilogue (& beginning of the sequel!)



Let the donor tell their story

Build the library of stories that donors share, which in turn, inspire others.



Build the next chapter

Data is more important than ever – our last donor is our best next donor, and ensuring that their data is accurate for them and our own models is vital



Say “Thank you!” more than “please”

It’s well-known that people remember how you make them feel; make them feel appreciated in perpetuity.



Keep sharing!

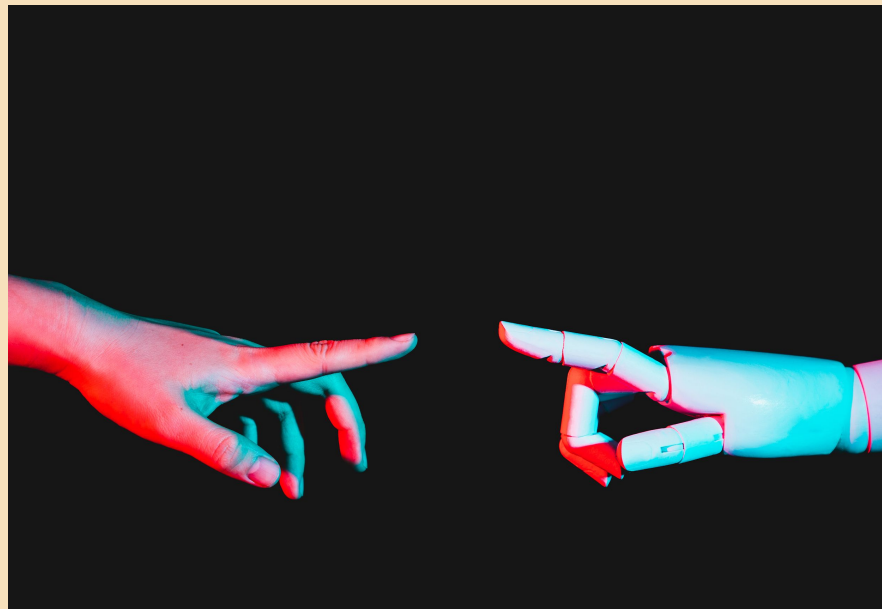
Don’t just send a donor’s report on the gift. Share – regularly – what’s happening at the institution. What sparks an interest? You’re back in the cycle!

Automation vs. the Human Touch



In this, the age of **AI**, we have ever-increasing opportunities for efficiency. By all means, build the predictive models, the chatbots that help a donor give, the (well-verified!) research. But always keep a human touch available. Ensure that alongside the chatbot is the contact information for the Gift Office; look at the results of those models and see threads of the fabric of your institution; get that research and remember that it is part of someone's story.

Use the tools you have to buy you the time for even greater human interaction.



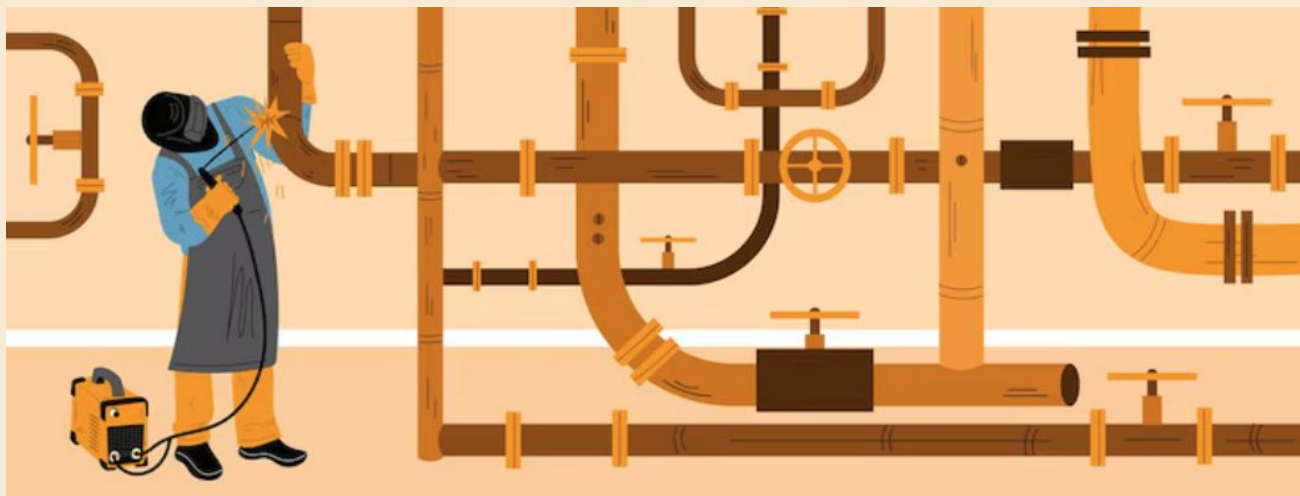


PROSPECT DEVELOPMENT FLOWS & THE CONNECTION ECONOMY



THE PSYCHOLOGY OF THE JOURNEY

Donors don't move through a pipeline; they move through a story about who they are.



We're not managing donors; we're *facilitating meaning*.

What's Changing in Donor Behavior



We are leaving the Industrial Economy and entering the Connection Economy ... relationships and human connections assume the mantle of value and economic growth.



The Connection Economy
thrives on abundance.

Connections create more connections.
Trust creates more trust.
Ideas create more ideas.



The Core Shift

- **Data** tells us what donors do.
- **Story** reveals who they are.
- **Psychology** explains why they give.

A **prospect development flow** is about recognizing and honoring that convergence.

The Invitation Framework

Every act of generosity begins with an invitation.

- Activate Identity — Who am I?
- Anchor Emotion — How do I feel?
- Affirm Connection — Where do I belong?
- Fundraising invites donors to live out who they already believe themselves to be.



I Think I Am . . .

Caring

Compassionate

Fair

Kind

Hardworking

Friendly

Trustworthy

Generous

Helpful



The Role of Data

THE FOUR-RIGHT RULE

RIGHT STORY = Affinity

RIGHT HUMAN =
Data/Research

RIGHT APPROACH =
Channels/Journey/Story

RIGHT INVITATION =
Giving History + Data + Case



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Donor Lifecycle Stage	StoryBrand Role	Invitation/Identity Layer	Data Lens
Identification	Character with a problem	Activate identity (“This is who you are”)	What behavior signals this identity?
Qualification	Guide emerges	Align values (“We see what matters to you”)	Engagement scoring, cause affinity
Cultivation	Guide gives a plan	Anchor emotion (“Here’s how we walk with you”)	Track response to content types, tone, story arcs
Solicitation	Call to action	Invite participation (“Here’s your part in the story”)	Optimize timing, channel, message resonance
Stewardship	Belonging and Mattering	Affirm connection (“You helped create this ending”)	Report back data as narrative proof of impact

Integrating Identity Into the Lifecycle

- Identification → Activate identity ('You care deeply about...')
- Qualification → Align values ('We've noticed your advocacy for...')
- Cultivation → Anchor emotion ('Together, we've already made...')
- Solicitation → Invite participation ('You belong in this circle of impact.')
- Stewardship → Affirm connection ('Because of you, this community...')

The Architecture of Trust

Prospect Development is the Cornerstone of Trust

- - Accurate records, ethical research, and transparent systems create confidence — both inside the organization and beyond it.
- - **Data stewardship is gift stewardship.**
(“You can’t steward a donor, you can only steward a gift.”)
- - When systems are consistent and reliable, they make the invitation believable.

Bringing It All Together

- Strategy | Systems | Story → Flow
- Systems support story.
- Story expresses identity.
- Data sustains belonging.
- When data serves connection and story serves identity, generosity becomes inevitable.



Data is the story
donors are telling us.



Data Stewardship = Donor Stewardship

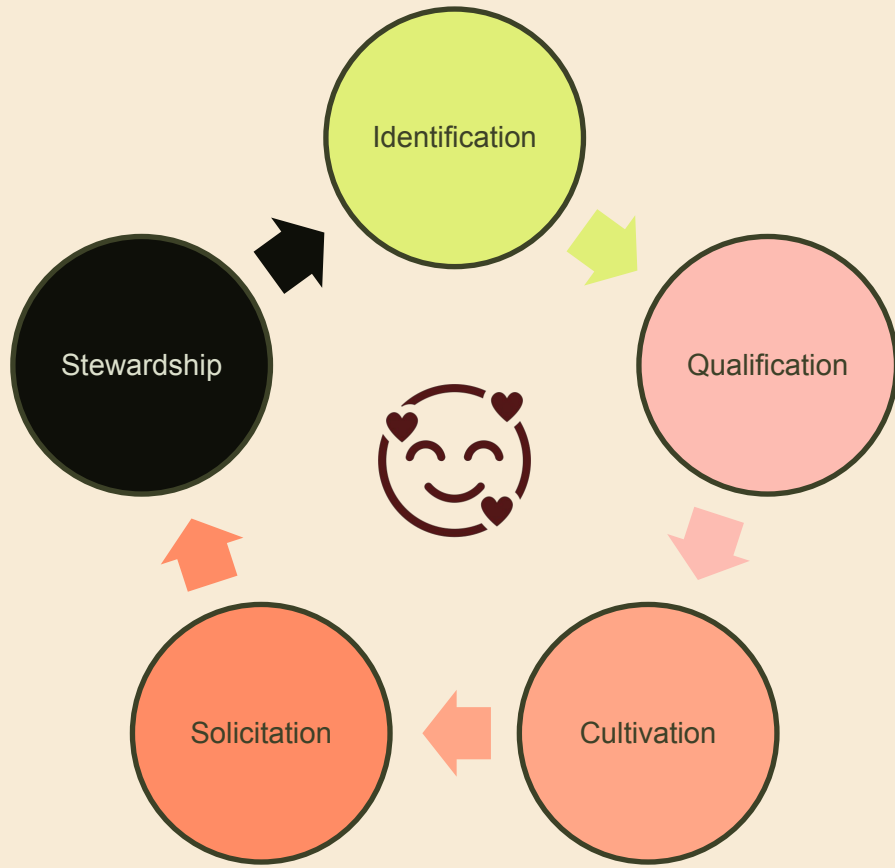
- Wrong name → broken connection.
- Outdated story → missed resonance.
- Incomplete history → lost trust.
- Data stewardship keeps the entire flow moving

Generosity Is a System, Not a Segment

Giving Level	Core Need	Expression of The Invitation	Data's Role
First-Time / Annual Donor	Recognition & belonging	"You matter here. You are part of this community."	Accurate contact info, timely acknowledgment, segmented welcome journeys
Mid-Level Donor	Relationship & resonance	"We see you. You make this possible."	Engagement scoring, behavioral tracking, personalized stewardship loops
Major Gift / Legacy Donor	Purpose & partnership	"You're shaping what this becomes."	Prospect research, narrative impact reporting, shared vision documents

Designing for Scale

- **Personalization isn't personalization** if it can't scale.
The goal isn't to send one perfect message; it's to build a *system that notices*.
- At the heart of scalable generosity are **data practices that preserve humanity**.
- Automation delivers *consistency*.
- Humans deliver *connection*.
- Prospect Development ensures that as generosity scales, **trust doesn't dilute**.



Design your flow

Choose a giving level and think about how you can design a flow centered around impact, data, & storytelling.





Questions?



Thank
you.