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How do we Set Up a Cultivation Pipeline?

What is a cultivation pipeline?

Managing a non-profit can be a balancing act. You want to fulfill your mission by helping some group that is in need, but to do that you have to receive the donations to implement it. How can you get potential prospects to be convinced of the value of your organization and want to help out? One way is by educating them about your organization through a series of emails or letters. This is a cultivation pipeline. Donarius implements this journey of moving prospects through tailored phases until they ultimately become donors or volunteers.

Design Your Pipeline

The first step is to record compelling or poignant stories of how your organization has helped someone. Then you would organize these into a series of emails or letters that you want to tell a prospect so that they become excited. Sometimes it is useful to include only part of the story and point the prospect to a link to go to where they can find out more. By adding this additional step you can gauge the interest of the prospect and move them to the next phase.

Setting up the Pipeline in Donarius

To set this up in Donarius, you would:

a) Setup a donor characteristic for each phase of your pipeline e.g. Phase1a, Phase1b, Phase1c, Phase2a, Phase2b, etc.
b) Convert each of the emails or letters above into a format that Donarius can use.
c) Add a command to each email or letter to indicate to the software which phase it is for.
d) Add a command to record that email or letter has been sent out to a prospect.

We can do the above for you (for a fee) if you provide each of your emails/letters as Word documents including the sequence they are to be sent out.

Sending out each Phase

Each day you would tell the software to send each email or letter. For example to send the emails, follow these steps:

1. Click on the **Mailings** icon and choose **View Emails**.
2. Where it says **Email to View**, select the email for Phase1a.
3. Click OK and you'll see which prospects will be getting that email. Then click **[Send Emails]** to send them.
4. Repeat the above for Phase1b, Phase1c, Phase2a, etc. i.e. you select the email for each phase and send it out.
5. Find out which prospects have clicked any links in past emails and manually move them to the next phase. This is done by clicking on **Donors** and choosing **Add/Edit Donors**. Find the donor and put a checkmark on the phase they have completed, so that their next email will be for the next phase. Note: a future version of Donarius will automatically move donors to a new phase when a link is clicked.

Sending out letters is a similar process but you would choose **View Letters** after clicking the **Mailings** icon.

Sources:

https://www.donarius.com/articles/Non-Profit.pdf (Accessed Nov 10, 2026)

https://www.donarius.com/Help/hs144.htm (Accessed Nov 10, 2026)

https://www.donarius.com/Help/email.htm (Accessed Nov 10, 2026)