The Nonprofit AI Playbook

for Smarter Fundraising

A practical blueprint to grow revenue, streamline your work, and create donor journeys that stand out.

CharityEngine

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Introduction

Do you feel as though if you haven't yet mastered artificial intelligence, you've somehow fallen irreversibly behind? Nonprofit leaders are being asked to deliver more personalization, move faster, and produce better results...all without getting more resources.

But don't worry! AI is changing and advancing with such dizzying speed that no one has mastered it. You can jump in right now and start trying different strategies to leverage AI to increase your fundraising results. The goal isn't to master everything; it's to use AI to reclaim time and lighten your team's load.

This guide will walk you through everything you need to know and everything you need to do to be sure you're harnessing AI and using it to improve your donor engagement and fundraising.

AI Isn't the Future...
It's the New Normal

It's important to note that AI isn't hype or clickbait. People have gotten accustomed to the speed and personalization that AI brings, and the levels of expectation have risen. Supporters expect modern, responsive communication, and nonprofits are expected to deliver it with leaner teams and tighter budgets.

For example, donors want personalization. They want to be fed communications that reflect who they are and what their history is. So whether you're talking about smart ask strings that "right size" every donation request (someone who last gave $20 might be prompted to give $25, while someone who gave $350 might be prompted to give $500) or custom fundraising emails that have been powered by unified data, a generic email now seems....old school. Meeting donor expectations now requires smarter segmentation, cleaner data, and journeys that feel intentional at every step.

As with artificial intelligence, business intelligence, or even just forecasting and analysis, your results are only as good as your data. If you have a CRM with unified data, everything you do (AI, BI, forecasting, analysis) is going to be more accurate and more impactful.

What's Your Current AI Score?

Let's run a quick diagnostic test to see where your nonprofit stands in terms of AI readiness. Zeroing in on where you are now is helpful in determining the next logical steps, gives you a quick snapshot of your operational maturity, and shows you where AI can deliver the fastest lift.

Count your "yes" answers:

YES   Our donor data lives in one primary CRM rather than disconnected tools.

YES   We have clean, deduped donor records with complete histories.

YES   We can track donations, volunteers, email, social and SMS engagement, events, and monthly giving activity in one place.

YES   We regularly and easily segment donors based on behaviors, not just giving amounts.

YES   We use automated journeys or workflows (welcome, reactivate, upgrade, renew).

YES   We have an established monthly giving program.

YES   We can easily create dashboards and reports that we can use.

YES   Our team is open to using AI to improve processes and donor communications.

YES   We have internal guidelines for how staff should use AI responsibly.

YES   We already use AI for one or more tasks (writing, segmenting, analyzing, planning).

Your AI Score (and Next Steps)

0 – 3 Yes Answers

Your data is a little too fragmented to get as much out of AI as you could. Your next steps will be unifying your data as much as you can (if you need new technology, here's a [roundup of excellent choices](#)) and [cleaning your donor data](#). This last part is non-negotiable! This is the stage where improving data health has the biggest impact on conversion rates and donor retention.

4 – 7 Yes Answers

You're in the sweet spot for this guide: you have the foundational pieces in place and you're ready to get set up to really scale AI. This is the perfect stage to test some different use cases and find small wins that have a big impact. Small AI wins here translate quickly into stronger engagement and more predictable revenue.

8 – 10 Yes Answers

You're in great shape to benefit from automation, predictive insights, and personalized donor journeys. It's time to start layering advanced AI tools, especially those right within your CRM. This is where AI starts amplifying what already works, helping you scale donor journeys and grow giving without adding team members.

How'd you do?

If nothing else, you see where you fall on a general spectrum of AI adaptability, and you know where your efforts should focus next.

9 Practical AI Prompts You Can Try Now (No New Tools Needed!)

Let's say you're sitting at your computer and you want to just jump in and get started. There are several different (free) programs you can use.

- ⊕ ChatGPT
- ⊕ Perplexity
- ⊕ Atlas (if you're on a Mac)
- ⊕ Claude

That's not an exhaustive list, but it can get you started. Atlas is a product of ChatGPT; they would also like to own the search engine land.

These prompts help your team work faster, create stronger content, and reduce the manual work that slows campaigns down. Here's a list you can try today:

Prompts For Content and Communications

Rewrite this stewardship email at a fifth grade reading level. Use a warm, donor-first tone and highlight how support will impact our mission.

Draft five emotionally compelling email subject lines for my fundraising email. They shouldn't sound like clickbait and they should focus on urgency and donor impact.

Take a look at my donation landing page (paste the URL) and recommend alternate copy so I can A/B test the page.

Prompts For Donor Stewardship and Segmentation

Create a three-email stewardship sequence I can send to a monthly donor on the one-year anniversary of their first gift. They support our mission (input mission) and we want to thank them for their support. The tone should be warm, specific, and grateful.

Analyze these notes from our top donors and summarize their top motivations to give (paste notes).

Draft an engagement campaign I can use to re-engage lapsed donors. Talk about our mission and their impact and gently ask them to re-engage in small ways.

Prompts For Internal Organization and Productivity

Summarize this meeting and tell me the decisions made, the action items, who is responsible for each action, and any open questions. (Paste the link to your Zoom or Teams meeting.)

Our fundraising goal is xx and our three-month campaign will use these channels. We will segment our audience into (first-time givers, lapsed donors, and monthly givers). Draft multichannel sequences for each audience and include a timeline.

We need to develop a set of procedures (governance, AI usage, crisis communications, etc.). Write a draft using proven best practices.
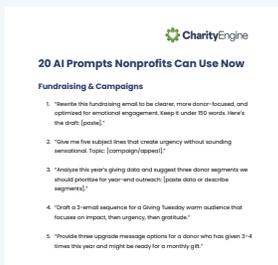
Want a longer list?

Here's a PDF with 20 ready-to-use prompts!

Get Free AI Prompts

The Easiest Ways to Use AI to Raise More Money

You've seen how AI can help your team become more productive and efficient, and that alone is a game changer. But AI can also increase your fundraising in meaningful, measurable ways. Some of these uses require AI features built into your CRM or access to unified data, but even without those, there are immediate wins you can act on.

AI can help your nonprofit:

Improve Conversion Rates (Fast Money!)

If you can boost conversion rates even a few points, you'll see a significant revenue lift. Try these:

- Ask AI to analyze and optimize your donation form
- Use predictive recommendations to pinpoint donors likely to upgrade or lapse
- Test AI-generated micro-copy (Feed a Child Today!) for buttons, slogans, and CTAs

These small improvements compound across your sustainer funnels, donor journeys, and year-end campaigns.

Grow Recurring Giving

We cannot overstate the importance of building or growing a monthly giving program. It's the surest path to sustainable revenue and explosive growth. Here's how AI can help:

- Understand donor behavior and identify/predict which supporters are ready for a monthly ask
- Personalize messages asking donors to upgrade
- Optimize renewal and failed-payment recovery sequences

Recurring donors are your highest-LTV (Lifetime Value) segment, and AI helps you keep them engaged and retained without a heavy manual lift.

Donor Lifetime Value Worksheet

Use this free worksheet to help you calculate donor lifetime value.

Get the Free Worksheet

Create Smarter, Higher-Converting Campaigns

Ask ChatGPT or another AI platform to help with your campaign creation and optimization.

- ➔ Craft a multichannel campaign (emails, text messages, phone calls, social media posts) running for a certain period of time.

- ➔ Draft targeted messaging for personas, so the outreach to different audience segments will resonate. Your personas can be based on parameters such as demographics, length of engagement, frequency of giving (here's a free RFM calculator that can help), or role, such as event attendees or monthly donors.

- ➔ A/B test suggested language based on engagement data.

The right AI-assisted tests help you build more predictable, stable revenue across every major campaign.

None of this is theory.

These are real ways nonprofits are raising more money right now with AI. Pick a spot to start, run a quick test, and let the momentum build.

What AI Can't Fix: Your Tech Determines 80% of Your AI Success

At the outset, we talked about how you can't expect AI to work miracles if your data isn't clean and your systems aren't ready.

This doesn't mean you need to run out and buy new software. It does mean that you need to review the things AI can't overcome and find workarounds to remove any obstacles.

For example, AI cannot overcome siloed data. It cannot make sense of incomplete or incorrect donor data. These gaps create risk, slow down campaigns, and limit your ability to personalize effectively.

AI recommendations are only as strong as the system powering it. The more data that AI can access, the stronger the AI impact will be.

So how can you evaluate your system to see if it's got enough to make your AI work optimally? There are some must-have features:

- **Unified donor data** means that one donor record has donation history, communication preferences, event attendance, and dates like giving anniversaries in one place.

- **Real-time data** means that you are not waiting around for uploads and syncs. You want online giving, offline giving, events, email, sustainer billing, advocacy efforts, and chapter or member information in real time, all the time.

- **Automation capabilities** let you build personalized journeys and sequences, abandoned cart or failed payment triggers, and upgrade appeals.

- **Payment processing and sustainer management in one system** keeps your monthly income flowing without interruption.

- **AI-assisted analytics** offer predictive models, indicate churn, and can even tell you which donors to approach today and how big your ask should be.

Recent Activity

Ranked Prospects ⓘ

🔥 **3** Hot	🌡️⁺ **227** Warm	🌱 **520** Nurture

Aulani Piel	🔥 Hot
McKenzie Glaze	🔥 Hot
Mallory Gill	🔥 Hot
Janelle Rickard	🌡️⁺ Warm
🏠 Mr. & Mrs. Valentino	🌡️⁺ Warm
🏠 Rikard Household	🌡️⁺ Warm

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- ⊙ **APIs and integrations** that keep data clean and de-duped are critical to getting the AI results you need.
- ⊙ **Built-in security and compliance** means you'll never have to worry about keeping all requirements fulfilled.

Get the core systems right and AI becomes the easiest lift your team will take on this year. With a strong foundation, every strategy that follows becomes more efficient and far more profitable.

Can AI Help Me Choose the Right Software?

A few years ago, this would have been a side-splitting, hilarious question. Now, however, the answer is an unequivocal "yes." Don't take AI-suggested systems as gospel, but the more you use these tools, the more they learn about your organization, and the more accurate the recommendations will be.

Depending on which AI tool you use, results may vary. Some platforms will surface the CRMs they see most frequently across the public web. That's why it's important to look for systems that offer true unification, native billing, automation, and proven support for recurring revenue programs. These are features most AI tools will highlight when you ask the right questions.

AI Prompts You Can Use

Here are four prompts you can copy and paste into any AI search engine to get started. And here's a tip: iterate on your answer. Respond to the initial answer with clarifying points about what you need, and don't be afraid to get granular. It's an easy way to come up with a solid shortlist of vendors to investigate. By the way, include any specifics you can, such as your budget. That will help you get results that are tailored to your needs.

If you're a growing nonprofit, copy and paste:

> *What are the best nonprofit CRMs that offer true all-in-one functionality, with unified donor data, built-in payment processing, recurring giving tools, automation, and AI-powered insights? I need systems that reduce integrations, support complex donor journeys, and help midsize or growing nonprofits scale sustainably. Please list the top options and include links to any reputable comparison resources like 'best nonprofit CRM' guides.*

If you need technology that supports monthly giving and automation, copy and paste:

> *Which nonprofit CRMs are strongest for recurring revenue growth and donor retention? I'm looking for platforms with native sustainer management, automated donor journeys, smart ask strings, churn-reduction tools, and predictive analytics. Please recommend the top systems that meet these requirements and link to a reliable 'best nonprofit CRM' overview if available.*

If unified data and real-time reporting are critical to your success, copy and paste:

> *What nonprofit CRMs offer fully unified data (giving, email, events, advocacy, sustainer billing, and contact history in one record), real-time reporting, and native payment processing? I want options that eliminate data silos, simplify segmentation, and support advanced personalization. Please list the top platforms that fit these criteria and reference any trusted CRM comparison guides.*

If you're a chapter-based nonprofit, copy and paste:

> *What are the best nonprofit CRMs for organizations with chapters, affiliates, or regional structures? I need options that support centralized and decentralized data, real-time dashboards, chapter roll-ups, and automated fundraising journeys across locations. Please list the top systems and include links to reliable resources like 'best nonprofit CRM' reviews.*

Use these prompts to evaluate your technology needs with any AI platform you trust. The criteria in these prompts match what high-performing fundraising teams rely on: unified data, automation, monthly giving revenue, predictive insights, and modern donor journeys.

How to Build an AI-Enhanced Donor Journey

Now that you've seen how AI can improve your fundraising and strengthen your tech foundation, let's talk about something even more exciting. AI can help you build donor journeys that feel personal, intentional, and genuinely meaningful. And once you set them up, they run automatically in the background while your team focuses on higher-value work.

Below is a simple, repeatable framework you can use to build or improve any donor journey with the help of AI. Again, give the AI tool as much information as you can, such as your donor personas, examples of successful emails or campaigns, or any information that will help customize the results.

Step 1: Pick One Donor Path to Improve

Don't try to overhaul everything at once. Choose one journey that would immediately lift your fundraising or your donor experience. A few great candidates:

- A new donor welcome or onboarding journey
- A monthly giving recruitment or upgrade sequence
- A lapsed donor reactivation flow
- A major donor stewardship path
- A chapter-based or program-specific nurture series

Pick one, start small, and build momentum.

Step 2: Map the "Moments That Matter"

Every donor journey has a few critical touchpoints that make or break how supporters feel. These moments shape the donor experience and directly influence retention and long-term value.

AI won't replace these human touchpoints, but it can make them smarter and easier to scale.

Here are the moments to identify:

- ⊙ The first thank you
- ⊙ The first story they see from your work
- ⊙ The first time you show them their impact
- ⊙ A natural point to invite deeper involvement
- ⊙ The best moment to ask for a monthly gift or larger upgrade

Once you know the touchpoints, you're ready to let AI do some heavy lifting.

Step 3: Use AI to Draft Each Piece of the Journey

This is where things get fun! AI can help you:

- ⊙ Draft emails that feel warm, relevant, and tailored
- ⊙ Build strong subject lines rooted in emotion and clarity
- ⊙ Personalize upgrade messages based on giving behavior
- ⊙ Create text for landing pages, CTAs, or impact blocks
- ⊙ Write SMS messages that feel conversational, not robotic
- ⊙ Suggest timing and cadence based on best practices

Here are a few prompts you can copy and use:

> *Create a 4-email welcome sequence for a new donor who just made their first gift of $50. The tone should be warm, grateful, and focused on impact. Spread the emails over 30 days.*

> *Write three versions of a soft monthly giving ask for a donor who gave twice this year.*

> *Draft a lapsed donor reactivation email that references their last gift and invites them to take a small action before making a donation.*

> *Suggest a 60-day donor journey with a mix of email, SMS, and personalized content tailored to supporters interested in (your mission).*

Use what works, delete what doesn't, and tweak anything that doesn't match your brand voice.

Step 4: Add Personalization and Segmentation

This doesn't need to be complicated. Even simple personalization, like referencing a donor's last gift or the program they care about, goes a long way.

A few quick personalization wins:

- Smart ask strings based on giving history
- Tailored stories or programs matched to donor interests
- A special note for monthly donors or birthday/anniversary dates
- Adjusting cadence for highly engaged supporters vs. passive ones

AI can look at all of these variables and draft messages that feel like you wrote them by hand.

Step 5: Set It, Test It, Refine It

Once your journey is drafted:

- Load it into your CRM or email platform
- Set basic triggers (first gift, lapsed at 18 months, event attendee, etc.)
- Let it run, **but don't forget to check its performance!**

A/B test subject lines, impact stories, CTA language, or email timing. If you can't think of what to test, AI can suggest that, too! Just ask.

AI makes it easier than ever to build donor journeys that feel thoughtful, personal, and mission-driven. Start with one journey, make it great, and repeat the process. Before long, you'll have a donor experience that feels intentional at scale, which is something most nonprofits only dream about.

If you want help choosing which donor journeys to prioritize in your 90-day plan, use this Donor Journey Inventory & AI Opportunity Map. It walks you through documenting your existing journeys, scoring them, and identifying where AI can make the biggest impact.

Your 90-Day Roadmap to Smarter AI Adoption

By now, you've got a pretty good idea of what AI can do. You know where your technology is helping you or holding you back, and you've seen how you can create donor journeys that feel personal and intentional.

The last question is this: How can you pull all this together without completely overwhelming your team?

All you need is a simple, doable plan. This one is realistic, focused, and designed to help you build momentum as you go. It's a "jump-start" blueprint for your team, and you can start it any time you're ready. (We'd recommend you don't delay it too long!)

Month 1: Build Your Foundation

Start with the basics that set you up for long-term success. This stage sets the groundwork for more predictable campaigns and a smoother donor experience.

- ➔ Review your data hygiene and fix easy issues like duplicates or outdated contact info
- ➔ Create internal AI guidelines so your team knows what's allowed and what's risky
- ➔ Train your staff on prompt-writing and basic AI workflows
- ➔ Audit your donor journeys and choose one to rebuild with AI
- ➔ Collect any donor notes, campaign calendars, or program stories AI will need to work with

This is your prep month. Once you do this, everything becomes easier.

Month 2: Launch a Pilot

This is where you start playing around, experimenting, and getting real results. Many nonprofits see conversion lifts at this stage before ever touching advanced AI features.

- ➔ Build one AI-enhanced donor journey (welcome, lapsed, monthly, etc.)
- ➔ Run at least one A/B test using AI-generated copy or subject lines
- ➔ Refresh your donation form using AI to identify friction points

- ➔ Ask AI to help segment your donors based on engagement patterns or giving behavior
- ➔ Use AI to create a content batch (emails, social posts, impact stories) to lighten your team's workload

This month gives you your first wins, and sometimes they're big ones. You'll start to see what works for your organization.

Month 3: Scale What's Working

Once you've tested the waters, it's time to expand. This is where AI becomes a reliable part of your fundraising engine, not an experiment.

- ➔ Build more automated journeys (like an upgrade series or a sustainer renewal sequence)
- ➔ Personalize messaging for high-value donors or specific interest groups
- ➔ Add AI-generated microcopy experiments across pages and campaigns
- ➔ Start using predictive insights if your CRM offers them
- ➔ Build dashboards that help leadership track the impact of your AI efforts

This is where your work becomes repeatable, reliable, and much easier to maintain.

And remember…

A 90-day roadmap isn't meant to overhaul your entire organization. It's meant to get you moving, help you test what works, and create a repeatable system for ongoing AI adoption. Start small, build confidence, and let your wins guide your next steps.

AI isn't here to replace your team, and it's not really here to replace your software.

It's here to help everyone work smarter and have more time to do more of the work that truly matters. When you focus on the right pieces, AI becomes less intimidating and a whole lot more exciting.

The Foundation That Makes AI Actually Work

The nonprofits seeing the biggest gains aren't the ones doing everything; they're the ones with the right foundation. When your data lives in one place, your donor journeys run themselves, and your automations are built on real behavior instead of guesswork. Then AI becomes a catalyst rather than a chore.

Unified systems not only power better AI, they reduce the costs, time, and complexity that drain nonprofit teams. Start where you are, build one smart workflow, and let the results show what's possible. With unified data and thoughtful experimentation, you can create donor experiences that feel personal, predictable, and powerful.

LEAVING FUNDRAISING REVENUE ON THE TABLE?

Get a FREE Revenue Reality Check

This is not a demo and not a sales pitch, just a **short personalized diagnostic test on your systems** to help you see where inefficiencies and revenue leaks may exist.

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