

Scaling Personalized Donor Engagement without Compromising Security or Internal Bandwidth

With a world-renowned academic medical center's charitable foundation

Challenge

Our client needed to scale donor outreach, improve personalization, and strengthen recurring donor relationships while working within strict data security protocols.

With limited internal bandwidth and growing expectations for tailored donor experiences, they required a strategic partner who understood the nuances of healthcare fundraising.

Solution

We became an extension of their internal team, guiding donor marketing strategy without ever accessing their Marketing Automation platform.



Advised on workflows, reporting, and platform strategy to scale communications.



Led nurture strategy and journey consulting to strengthen recurring donor relationships.



Designed a preference center to improve segmentation and content relevance.



Delivered all strategy without needing platform access, ensuring data privacy compliance.



Outcome

Our collaboration and expertise allowed them to uphold its strict data and privacy requirements while still delivering strategic depth and executional clarity including these three things:



Reduced manual marketing tasks.



Increased donor personalization and retention.



Built scalable, secure systems for long-term fundraising growth.