



STEWARDSHIP AT SCALE

# Automation with a human touch

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# Introductions



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# Agenda

1. Intro: Using automation to create space for human touch
2. What is Scalable Stewardship?
3. Where automation fits in the donor journey
4. Best practices & things to avoid
5. The “Stewardship Stack” in action with the American Heart Association
6. Q&A - *please add any questions to the Q&A submission box!*

# Housekeeping

1. This session is being recorded
2. The recording will be available here later today
  - Later this month, we'll add it to the Learning Hub (accessible in your Partner Portal)
3. The slide deck can be downloaded below
4. This session is CFRE-approved for 1.0 continuing education credit



Introduction

# Automation creates space for human touch

# Automation creates space for human touch

## Pain points

- Donor expectations are rising (timely, personalized, relevant)
- Staff capacity is limited
- Stewardship often feels like a "to-do" list that grows faster than the team
- When we are busy, the first thing to drop is the non-urgent "thank you"

## The vision

- Automation ≠ replacing human touch → **it creates space for it!**
- Moving from "one-off gestures" to an **operationalized system (aka Stewardship Stack)**



What is scalable stewardship?

# What is “scalable stewardship”?

## What it is...

- Consistent follow-up across *all donors* (not just major gifts)
- Timely touchpoints triggered by behavior (not manual tracking)
- Personalized communication at scale

## What it is NOT...

- Automating everything so you never interact with donors
- Cold and generic outreach

## Examples

- Instead of ad hoc thank-yous → triggered, timely acknowledgments when new PG donors are added to your CRM
- Instead of manually tracking PG donor stewardship outreach → automated welcome + education series



# Where automation fits in the donor journey

# Where automation fits in the donor journey

## Step 1: Tag the donor appropriately

- Contact tagged in CRM within 1 week
- Tag triggers human follow-up

## Step 2: Start with a human touch

- Templated Email Thank You - **personalized** by gift officer
- Phone call to thank donor, text follow-up
- If donor does not respond: Second email replying to the initial email with personalized, templated reminder
- Hand written Thank You note
  - Idea: Card vendor like **Handwrytten** or **Postable**

## Step 3: Plan for ongoing education

- Within **one week** add the contact to e-newsletter/organizational updates email list



# Early stewardship (first 30-90 days)

Fully-automated  
Stewardship Stack!

## Welcome Series (2-3 initial emails)

- Welcome to the Legacy Society/esteemed group!
  - A heartfelt thank you (consider adding a video)
  - Focus on the permanence of their gift
  - Confirm they are now part of the **[Legacy Society Name]** or **esteemed of group of donors**
- Educational content (impact stories, how gifts are used)
  - *The “**Impact Story:**” A “no-ask” update*
  - *Share a short story of a life changed by the mission, showing the future they are now protecting*

## Ongoing Stewardship

- Quarterly impact updates, annual reports
- Birthday wishes! → Trigger a human touch: 2 weeks prior to the donor’s birthday, send a card
- Segment newsletters/updates based on donor’s interests



# How to set up automation

You don't need a complex CRM. Since systems differ, consider using AI to help configure the steps for your specific setup.

## Step 1: Map it out

- Trigger → Action → Timing
- Example:
  - Trigger: Donor leaves a charitable bequest
  - Actions: Task assignments + Planned Giving Welcome Series
  - Timing: 1 week after last personalized email

## Step 2: Use what you already have

- Email platform: Mailchimp, Constant Contact
- CRM email templates (if applicable)

## Step 3: No Automation? Batch tasks!

- Example:
  - Every Friday send Welcome emails using a template





Best practices & things to avoid

# Best practices to follow

*Automation should never be  
the last touch, it should  
prompt the next human one!*

## Your voice is valuable

- Avoid sending 100% AI generated content

## Balance automation and human touch

- What to automate:
  - Task assignment
  - Welcome Series
  - Reminders for Gift Processing Teams
- What to humanize:
  - Thank you email personalization
  - Phone calls
  - Text messages
  - Handwritten notes
  - In-person time



# Best practices to follow

*Stewardship is key! Research shows confirmed bequests are about twice as likely to be removed if donors receive no communication*

## Start simple (don't over-automate)

- Begin with 1-2 automations (task assignment, welcome series)
- Build and customize over time

## Personalization > perfection

- Use things like:
  - A real sender name (instead of *development@* or *info@*)
  - Include a headshot of the 'sender' in the email signature
  - Informal gratitude video
- Light personalization goes a long way!

# Things to avoid

## Do not...

- *Set it and forget it*
  - Create a calendar reminder once a quarter to audit existing automations
  - Document every active automation with shared team access
- Overload donors with too many emails
  - Track the following:
    - Engagement: Open/click rates
    - Conversion: PG donor gives annually, etc.
    - Retention over time
- Ignore personal follow-up (phone calls, donor meetings, text messages)





Quick wins

# Quick wins

## Level 1: 10 minute Reminder Automation

- Take 10-15 minutes and set a calendar reminder to review new gifts and batch send thank you notes to donors weekly.

## Level 2: Email Welcome Series

- Take 1 hour to utilize the “**Trigger → Action → Timing**” framework to create an automation for a simple 2-email Welcome Series
  - Decide your Trigger, Action, and Timing.
  - Outline a plan for personal *versus* automated follow-up.
  - Review your automation after one month.





Stewardship Stack in action:  
**American Heart Association**

# American Heart Association



**Pamela Leonard**

National Executive Lead,  
Charitable Gift Planning

## Current Stewardship Stack

- Email #1 (personalized template)
- Email #2
- Call (optional text)
- Email #3
- Add to automated Legacy Society ongoing communication



Q&A

# Resources recap

- [AI Prompt](#) for building a stewardship automation in your CRM
- Planned Giving Stewardship:
  - [Email, call-scripts & text templates](#)
- Smart Giving:
  - [Stock Stewardship Guide](#)
  - [QCD Stewardship Guide](#)
  - [DAF Stewardship Guide](#)
  - [Crypto Stewardship Guide](#)
- American Heart Association [case study](#)





# Thank you!

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