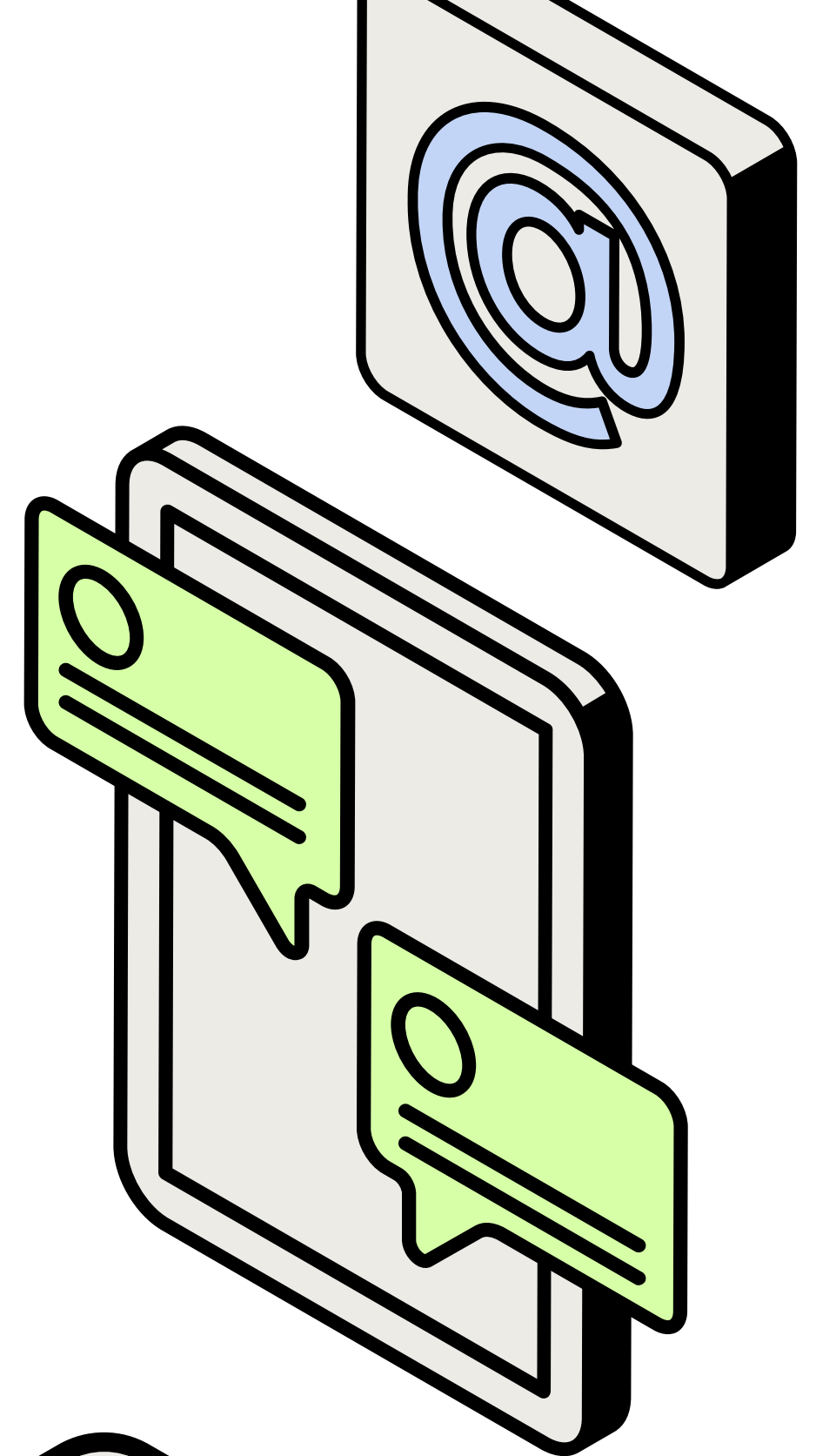
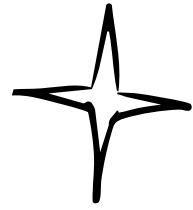


The Digital Fundraiser's Toolkit: The Tools That Save You Hours



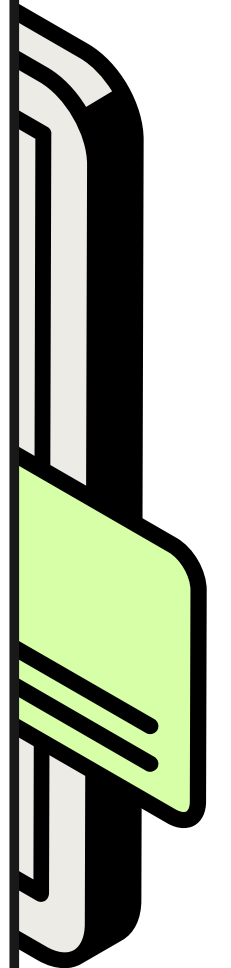
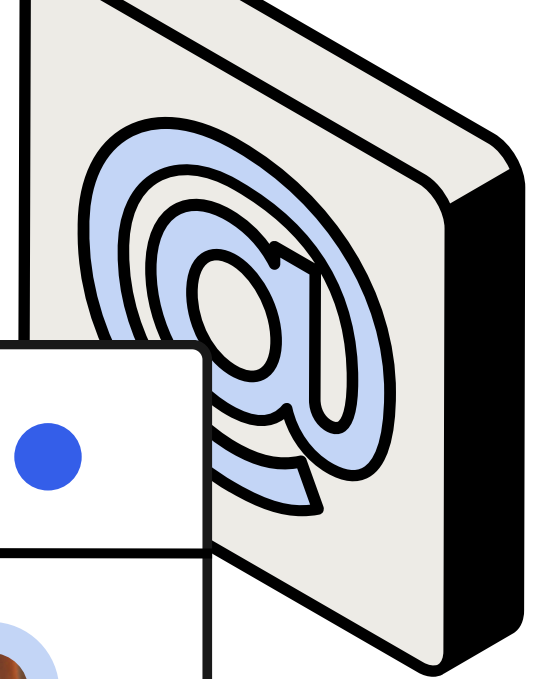
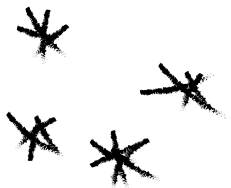


TEREZA LITSA

WELCOME 🖐️

Tereza Litsa

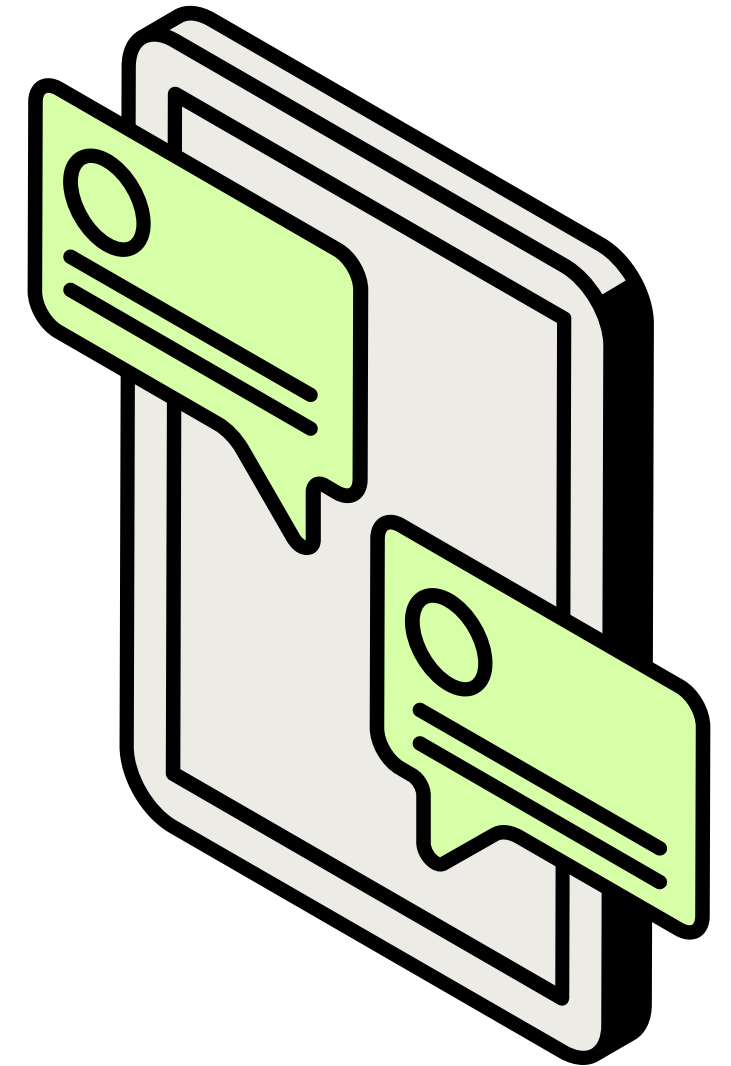
- Marketing strategist
- LinkedIn trainer
- Working with brands and nonprofits



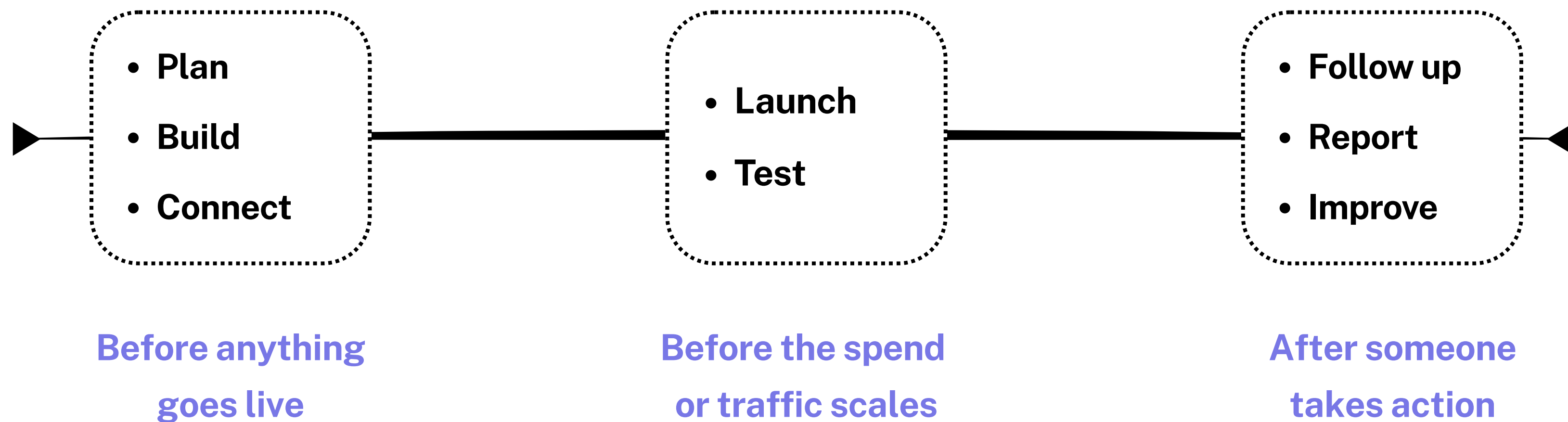
Every fundraising team pays a manual tax

Three quiet costs that take hours:

- Leads needing to be up-to-date across different tools and reports
- Unverified leads burning ad spend
- Not knowing which channel actually converts



The journey-led toolkit



Plan

- What action are we asking for: donation, lead, event sign-up, or volunteer enquiry?
- Where should the data go after someone takes action?
- What follow-up should happen, and how fast?
- What needs to be tracked, and what will we report on?
- Who owns the pre-launch checks?

Tools

- Campaign plan + UTM sheets
- Google Sheets / Excel
- Notion / Airtable
- Trello / Asana / Monday
- ChatGPT / Claude



Build

- Landing page, donation form or lead form
- Event registration and email confirmation
- CRM record and internal notification
- Tracking setup wired in from the start
- Consent capture — not bolted on afterwards

Tools

- **Donorbox / JustGiving / Givebutter:**
donation pages
- **Website landing pages**
- **Typeform / Meta & LinkedIn Lead Forms**
- **GTM, GA4, Meta & LinkedIn Insight Tag:** tracking setup



Connect

- Lead form → CRM
- Donation → fundraiser alert
- Event sign-up → email platform → reminder
- High-value enquiry → team notification
- Campaign action → nurture journey

Tools

- **Zapier:** straightforward workflows (eg. Meta lead → CRM → alert)
- **Make:** Good for branching workflows with multiple decisions
- **CRM workflows:** native automations inside your donor database
- **Slack / Teams alerts:** human eyes on the moments that matter



Launch

- Email, organic social, partner campaigns
- Meta Ads, Google Ads / Ad Grants
- LinkedIn Ads
- QR codes and ambassador / trustee posts
(Canva has a QR generator)
- Link tracking

Same questions every time: what are we asking,
how are we tracking it, what happens next?

LinkedIn beyond tracking

- **Sales Navigator:** build CSR/corporate-led partner lead lists with intent alerts
- **Document Ads + Lead Gen forms**
- **Thought leadership ads:** leadership posts warm up before the ask
- **Organic posts** from the team



Test

- Does the page load? Do links work? Are UTMs present?
- Does the form submit and does the donation journey complete?
- Does the confirmation email arrive?
- Does the lead reach the CRM? Does the internal alert trigger?
- Does the right tag/pixel fire and does GA4 record the event?
- Is anything firing twice?

Tools

- **Google Tag Assistant:** install and troubleshoot tags
- **GA4 DebugView:** test donation journey events
- **Meta & TikTok Pixel Helper:** check pixels are working
- **Test donations / payment sandbox:** a real transaction, not a guess
- **Browser / device checks:** mobile test



Follow up

- New donor welcome email
- Regular giver thank-you journey
- Event reminder + post-event follow-up
- Corporate partnership enquiry handover
- Re-engagement journey for lapsed supporters

Tools

- **Mailchimp / MailerLite:** automated welcome & stewardship series
- **HubSpot / Salesforce etc:** CRM-driven workflows
- **Zapier:** follow-up automations



Report

Going beyond clicks and impressions:

- Valid leads, consent rate, donation completion rate
- Follow-up engagement and lead quality
- Conversion to donor / prospect / volunteer
- Drop-off points across the whole journey

Tools

- **GA4 + Looker Studio** : campaign performance dashboard
- **GA4 Explorations**: underused for donation-funnel drop-off
- **CRM & email platform reports**: whether it actually mattered, not just what happened
- **LinkedIn Campaign Manager**: corporate/major-donor funnel performance



Improve

The conversion is not the end. It is the start of the relationship.

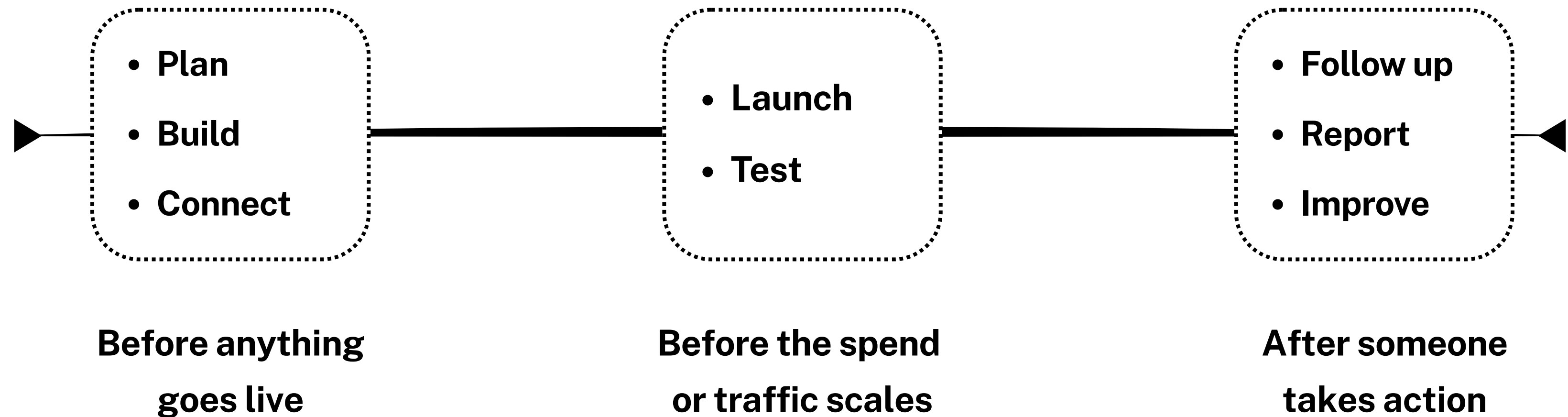
- What should we repeat?
- What should we stop doing?
- What needs a better process?
- What should we test next?
- What could we automate next time?
- What follow-up needs improving?

Tools

- **Campaign retrospective template**
- **AI summaries**
- **GA4 Explorations**
- **Survey / feedback tools**
- **Sheets / Excel analysis**
- **Testing backlog to track future ideas**



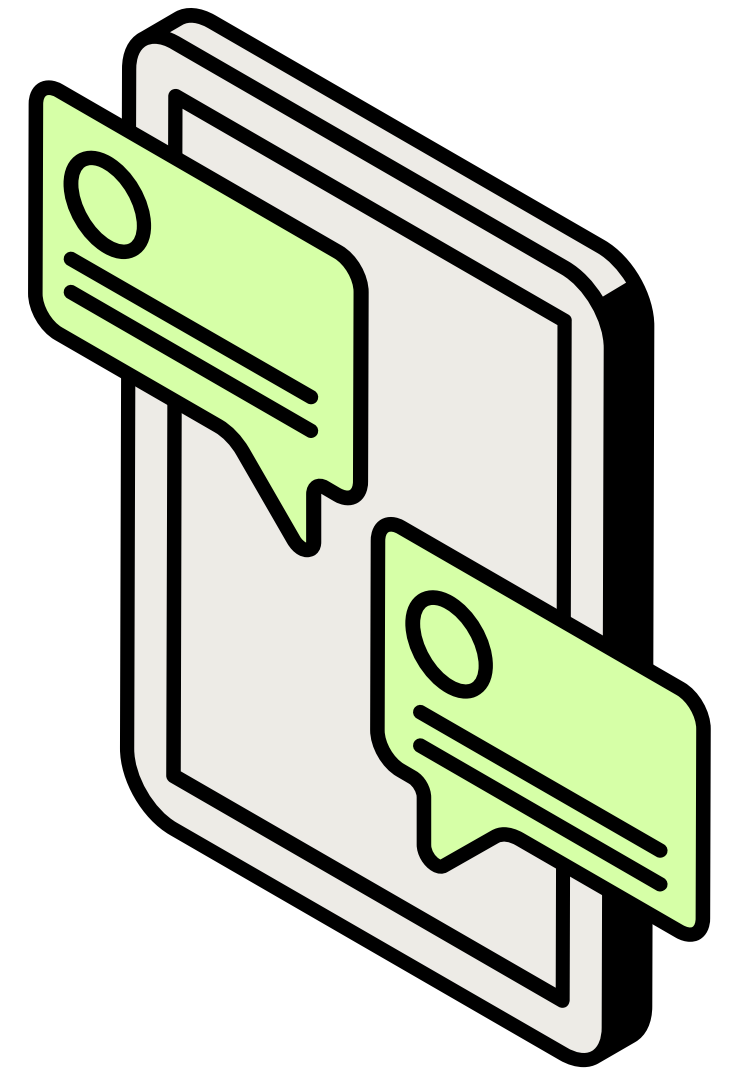
The journey-led toolkit

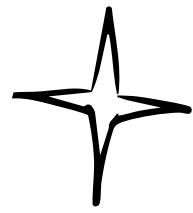


You don't need more tools. You just need the ones that help you on every stage.

The best toolkit is the one that makes the next campaign easier to run

- Which channel drove useful action, and where did people drop off?
- Which audience, creative or message worked best?
- What broke, or took too long?
- What can be automated next time?





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Thank you.

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