



The Winning Formula in Major Gifts

How Tech + Relationships Together Achieve Fundraising Goals

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Objectives

- ◆ Understand why technology and relationships are both essential to major gift fundraising
- ◆ Explore how collaboration between frontline fundraisers and data teams strengthen donor strategy
- ◆ Identify practical ways to improve communication, prospect management, and donor engagement



The Fundraising Paradox

- ✦ Technology and data provides insights but not human connection
- ✦ Relationships inspire giving but need data to guide them
- ✦ Alone, each is limited but together, they're transformational

Technology



Relationships



**Fundraising
Success!**



Relationship Building and Major Gifts

- ✦ Identification of donors somewhat differs by sector, the qualification process is similar
- ✦ Role of the fundraiser:
 - **Listen deeply**, don't make assumptions
 - Align donor passion with mission impact
 - Builds **trust** through engagement and stewardship
 - Solicits for new gifts and commitments that are **mission-driven**
- ✦ Dialogue transforms data into dollars





Alone vs. Together

- ♦ **Tech Alone:** Identifies wealth but doesn't know donor motivations
- ♦ **Relationships Alone:** Builds trust but risks missed opportunities without data
- ♦ **Together:** CRM flags donor – MGO engages – tailored cultivation – meaningful gift
- ♦ **Examples:** LYBUNT donors, “The Hidden Major Gift Donor”





Collaboration in Action

- ✦ Involve fundraisers in shaping CRM reporting needs
- ✦ Regular portfolio review meetings between Prospect Management and Major Gifts
- ✦ Building and prioritization of major gift pipeline
- ✦ Shared accountability for prospect movement
- ✦ "The Right Ask at the Right Time by the Right Solicitor"
- ✦ Celebrate gifts and roles in closing the gift and the power of storytelling





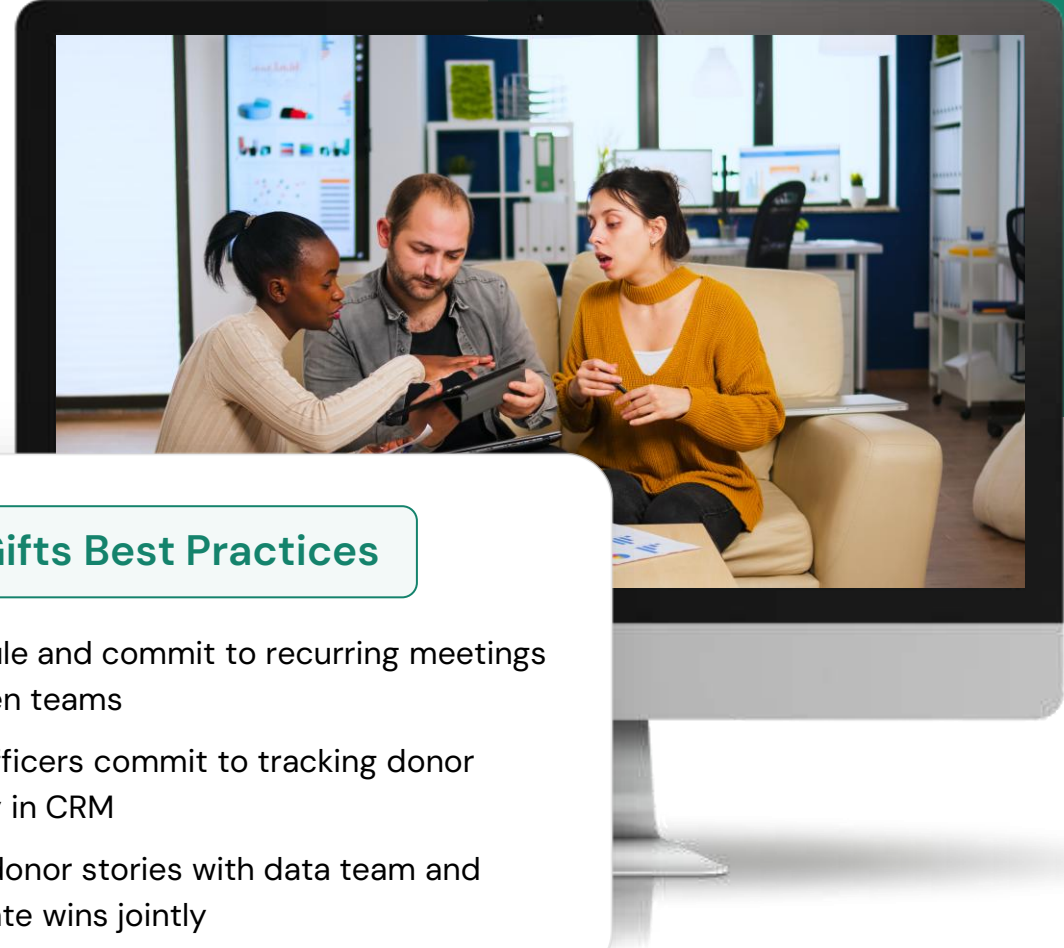
- ✦ Higher retention and upgrade rates
- ✦ Stronger major gift pipelines
- ✦ More efficient use of staff time
- ✦ Increased donor satisfaction and trust



Results of Collaboration



Best Practices for Teams



Data Team Best Practices

- ◆ Invest time in CRM training for frontline fundraisers
- ◆ Provide relevant reporting for prospecting, moves management and attainment

Major Gifts Best Practices

- ◆ Schedule and commit to recurring meetings between teams
- ◆ Gifts officers commit to tracking donor activity in CRM
- ◆ Share donor stories with data team and celebrate wins jointly



The “Winning Formula” in Major Gifts

- ◆ Think “partnership” not silos
- ◆ Success requires **BOTH:**
 - Data for clarity and prioritization
 - Relationships build trust and inspire
- ◆ Use technology to work smarter and relationships to make a lasting impact
- ◆ Together, they create transformational philanthropy



Thank You



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