The Nonprofit Automation Checklist

10 Time-Saving Tasks to Automate This Week

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A free guide for small and mid-sized nonprofit leaders.

Is Your Team Buried in Busywork?

How many hours did your team spend this week on manual data entry, pulling reports, or wrestling with spreadsheets?

If you're like most leaders at small and mid-sized nonprofits, your answer is **"Too many."**

Your team is passionate about the mission, but they're trapped in administrative tasks. This relentless manual work doesn't just drain time; it's a primary driver of staff burnout and a barrier to building the donor relationships that actually fuel your fundraising.

90%

Nonprofit leaders

gravely concerned about staff burnout

40%

Organizations

admit they lack the process automation they need

It's time to get your hours back.

Automation: Your Path to Efficiency

Automation isn't a complex, expensive luxury reserved for massive organizations. It's the single most effective way to reclaim your team's time, boost morale, and free them to focus on what they do best: building connections and driving your mission forward.

This checklist is your starting point. We've identified 10 high-impact, time-saving tasks that are prime candidates for automation. Use this guide to spot your biggest "quick wins" and start your journey to a more efficient, effective, and resilient organization.

Part 1: Fundraising & Stewardship Automation

The 10-Task Automation Checklist

Check the boxes that represent your organization's biggest time-drains.

[ ] The Instant Donation "Thank You“

The Time-Drain: A fundraiser manually runs a report of daily donations, uses a mail merge, and sends individual thank-you emails. This delay means a donor might wait 24-48 hours for acknowledgment.

The Automation Solution: An automated workflow that instantly sends a personalized, beautifully branded "Thank You" email the moment a donation is processed. This provides immediate gratitude and confirms the gift, delighting your donors when their generosity is top-of-mind.

[ ] The New Donor Welcome Series

The Time-Drain: New donors get one thank-you email... and then nothing until the next appeal. This is why over 70% of first-time donors never give a second gift. Manually tracking and emailing new donors with a stewardship "journey" is nearly impossible for a small team.

The Automation Solution: A 3-part automated email "journey" for all first-time donors.

- Day 1: Instant Thank You (see #1).
- Day 7: An email with an impact story or video.
- Day 30: A non-ask email from the Executive Director, checking in and inviting them to follow on social media.

More Fundraising Automation Wins

[ ] The Lapsed Donor "At-Risk" Alert

The Time-Drain: You only realize a donor has lapsed when you pull your annual report, by which time they're long gone. Reactivating a lapsed donor is far cheaper than finding a new one, but you have to act fast.

The Automation Solution: An automated rule that flags a donor as "At-Risk" the moment they hit 12 months without a gift. This can automatically add them to a "We Miss You" re-engagement email campaign or, even better, create a task for a fundraiser to make a personal phone call.

[ ] Birthday & Anniversary Reminders

The Time-Drain: You collect birthday data but never use it. Manually checking a spreadsheet for daily birthdays is tedious and often forgotten.

The Automation Solution: An automated task generated on a donor's birthday or "first gift" anniversary. This task lands right on your fundraiser's dashboard, prompting them to send a personal email or make a quick "thinking of you" call—a high-touch, personal interaction that builds incredible loyalty.

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More Fundraising Automation Wins

[ ] Recurring Donation Management

The Time-Drain: Manually processing recurring gifts, tracking failed payments from expired credit cards, and then chasing down donors one by one to update their information.

The Automation Solution: An integrated payment system that automatically processes recurring gifts. More importantly, it can automatically send a polite email reminder to a donor whose payment fails, linking them to a secure portal where they can update their card details themselves.

Part 2: Data & Reporting Automation

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[ ] Automated Report Delivery

The Time-Drain: Your Executive Director and board members ask for the same reports every week or month. Your development associate spends hours pulling, formatting, and emailing these reports.

The Automation Solution: "Set it and forget it" reporting. Create your key reports (e.g., "Weekly Fundraising Totals," "Campaign Progress," "Lapsed Donors") once, and schedule them to run automatically and be emailed to your leadership team every Monday at 9 AM.

[ ] Donor Portal & Receipt Access

The Time-Drain: The end-of-year rush. Donors flood your inbox in January asking for a copy of their annual tax receipt, and your team spends weeks manually pulling and sending individual statements.

The Automation Solution: A secure donor portal where supporters can log in 24/7 to see their own giving history and download their tax receipts and donation statements on demand. This empowers donors and saves your team dozens of hours.

[ ] Task Creation for Major Donors

The Time-Drain: A major donor opens your newsletter, clicks a link, and visits your "Planned Giving" page. You have no idea this happened, and a critical engagement signal is lost.

The Automation Solution: A workflow that creates a high-priority task for a fundraiser when a donor in your "Major Donor" segment takes a high-value action (like visiting a specific webpage or clicking a campaign email). This is responsive fundraising—turning digital signals into real-world conversations.

Part 3: Volunteer & Operations Automation

[ ] Volunteer Shift Reminders

The Time-Drain: Manually emailing or calling every volunteer to remind them of their upcoming shift. This is a huge time-sink for volunteer coordinators and leads to no-shows when people forget.

The Automation Solution: Automated email and/pre-shift reminders. Send an automatic confirmation when they sign up, and another reminder 24 hours before their shift begins, complete with location, time, and your contact info.

[ ] Automatic Hour Tracking

The Time-Drain: Volunteers sign their name on a physical sheet, and your staff must manually enter those hours into a spreadsheet to track impact and grant requirements.

The Automation Solution: A volunteer portal where volunteers can check in and out of their shifts digitally. The system automatically logs their hours, calculates their total impact value, and syncs that activity directly to their profile in your CRM.

Stop Dreading the "Busywork." Start Automating It.

Imagine your Monday morning.

Instead of running the same old reports, you're calling a major donor who your system flagged as "highly engaged." Instead of manually processing failed credit cards, your team is mapping out a new stewardship plan for first-time donors.

This isn't a fantasy. It's the reality of a modern, all-in-one nonprofit CRM.

The tasks on this checklist show you **WHAT** to do. Aha Impact is the **HOW.**

We built Aha Impact for one reason: to help growing nonprofits finally break free from the outdated, disconnected systems that drain their time and trap their data.

Our platform has automation built-in, from automated follow-up tasks and birthday reminders to a fully integrated donor portal and marketing suite.

You don't need to be a tech expert. You just need a tool that was built for you.

Ready to Get Your Hours Back?

You've seen how automation can save you hours each week.

Now, let's make it real — see how Aha Impact helps you implement every task from this checklist (and more) in one unified platform.

Scan the QR code below to book your free 20-minute Discovery Call and see how Aha Impact can help you re-engage your supporters.

Let's get started today!

P.S. Worried about switching from your old system? We make it painless. Ask about our Zero-Cost Migration and 5-Day Go-Live promise. We'll handle the data transfer so you can stay focused on your mission.

*Available for small to mid-sized nonprofit organizations. Terms and conditions apply