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## Breaking the \$2.5M Ceiling: How a Two-Person Development Team Generated \$202K from Strangers in Nine Months

*A case study on transforming major donor fundraising from maintenance mode to sustainable growth*

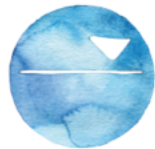
Executive Summary .....	2
The Plateau: What Stagnation Actually Looks Like .....	3
The Partnership: Beyond Prospect Research .....	5
The Journey: How Growth Actually Happens .....	7
The Results: What Changed in Nine Months .....	10
Lessons for Development Teams .....	12
The Partnership Model: When to Consider External Support ....	15
Conclusion: From Maintenance to Momentum .....	16
About This Case Study .....	17
Appendix: Development Team Playbook .....	18



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## Executive Summary



# HEALING WATERS INTERNATIONAL

Healing Waters International spent three years trapped at \$2.5 million in annual revenue. Their two-person development team knew how to maintain relationships with longtime supporters but had never successfully cultivated a major gift from a previously unknown prospect. When the organization launched an ambitious expansion requiring \$300,000 in additional revenue, they faced a stark choice: learn to do major gifts differently or scale back their mission impact.

Healing Waters had been working with Atticus since late 2023 for prospect research, but results were limited. The breakthrough came in January 2025, when they shifted from occasional research support to a fully embedded strategic partnership.

Through weekly coaching, structured relationship planning, and a fundamental mindset shift, the team secured 6 major gifts totaling \$202,000 from 4 previously unknown prospects who became new major donors. Beyond these results from cold outreach, the systems and strategies implemented through the partnership transformed their entire fundraising operation, demonstrating that small teams can achieve significant growth when equipped with the right frameworks and support.

This case study documents the specific frameworks, pivotal decisions, and operational changes that enabled this transformation. For development professionals at small to mid-sized nonprofits, it offers a replicable model for breaking through revenue plateaus without adding headcount.

## The Plateau: What Stagnation Actually Looks Like

### *The Surface Problem*

In late 2024, Healing Waters International stood at an inflection point. The organization had spent 15 years delivering clean water to underserved communities through point-of-use solutions. Now they were ready to scale impact dramatically by installing community-wide piped water systems that would deliver clean water directly into homes across Central America and the Caribbean.

The 2025 goal was ambitious: serve more than a dozen communities across three countries, reaching over 11,000 people. The capital requirement exceeded \$2 million, including \$300,000 in new revenue beyond their current donor base. Leadership made a strategic decision: rather than spread efforts across multiple fundraising channels, they would focus on building new major donor relationships to accelerate growth.

There was just one problem: Healing Waters had never successfully cultivated a major gift from a previously unknown prospect.

### *The Real Problem*

The development team consisted of two people working from the U.S. office. Both were capable and committed, but they operated without a structured major donor strategy. Annual revenue had plateaued at approximately \$2.5 million for three consecutive years. When leadership examined their fundraising data, the patterns were clear:

- **No pipeline:** Reviews showed zero new qualified major donor prospects
- **Maintenance forecasting:** Projections simply repeated last year's gift amounts from the same donors
- **Reactive stewardship:** A single staff member managed all proposals, reports, and communications with no systematic follow-up
- **No prospecting experience:** The team had never successfully engaged a major donor they didn't have a prior connection to

Most of their major donors (defined as gifts of \$5,000 or more) had come through the founder's personal relationships or through a previous development staff member. The current team knew which donors enjoyed coffee meetings and maintained that level of contact, but they lacked confidence and training to lift giving levels or approach new prospects.



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### *What Was Actually at Stake*

The organization's expanded mission required complex engineering, multi-year community partnerships, and significantly higher per-capita costs than their previous model. Without new major donor relationships, Healing Waters faced:

- **Delayed project timelines:** Communities selected for water systems would wait months or years longer
- **Missed construction windows:** Remote mountain communities have limited seasonal access
- **Strategic credibility risk:** Announcing an expansion without the funding to execute it would damage trust with both communities and existing donors
- **Staff uncertainty:** Field engineers and operations staff need predictable project pipelines

But the real stakes went beyond organizational metrics. Field staff understood what delayed funding actually meant:

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*"When we ask, 'Who are you?' the kids respond, 'I am a wonderful creation.' Hearing them declare that—from little ones to teenagers—fills me with joy. It doesn't matter that it takes ten hours to reach these communities; seeing this transformation makes it all worth it." —Isaura, Field Staff*

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*"It's not always about the beautiful, emotional moments. There are many difficult days filled with technical challenges, community issues, contracts, and logistics. These things aren't glamorous, but they are part of the work God has called us to do." —Sebastian, Field Staff*

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The plateau wasn't just a fundraising problem. It was a capacity crisis that would determine whether the organization could fulfill its expanded mission and reach communities where children needed both literal and living water.



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## The Partnership: Beyond Prospect Research

### *The Decision Point*

By the end of 2024, leadership made a consequential decision. They had been working with Atticus since late 2023 for prospect research, but results had been limited. The breakthrough came when they committed to go all-in on the partnership.

In January 2025, Healing Waters transformed their Atticus engagement from occasional prospect research to comprehensive strategic partnership. This meant weekly or biweekly coaching sessions, real-time donor strategy consultation, and systematic implementation of new fundraising frameworks.

The scope included:

- Delivery of 59 high-quality prospect profiles (75% new prospects with no prior connection, 25% overlooked contacts already in their network)
- Weekly strategic consulting sessions
- Ad-hoc coaching for specific donor conversations
- Custom relationship engagement plans (REPs) for each prospect
- Email and call scripts
- CRM structure and forecasting models
- Ongoing refinement based on what was and wasn't working

### *What Changed Operationally*

The partnership introduced several new rhythms and tools that remain in use:

**Relationship Engagement Plans (REPs):** Rather than generic "reach out to this donor," the team created personalized maps for each prospect that started with understanding the individual. Each REP documented:

- Donor's values, interests, and giving motivations
- Connection points between their passions and HWI's mission
- Cultivation approach tailored to how this specific person likes to engage
- Timeline that respected the donor's decision-making pace
- Stewardship touchpoints designed around what would be meaningful to them
- Potential project alignment (not "what we need to sell" but "what might resonate")
- Next actions with specific deadlines to ensure follow-through

**Weekly Development Huddles:** Short internal check-ins to review portfolio progress, upcoming deadlines, and obstacles requiring coaching.



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**CRM Discipline:** Atticus trained the team to use Salesforce for task reminders and progress tracking. Previously, donor touchpoints lived in email inboxes and memory. Now every interaction was logged with next steps assigned.

**Engagement Tracking:** A custom Excel tool (later integrated into Salesforce) logged every touchpoint with each prospect, preventing outreach from falling through the cracks.

**Forecasting for Growth:** Instead of projecting gifts based on prior year giving, the team built forecasts around donor potential and organizational need, then worked backward to identify the cultivation required to reach those goals.

**Stewardship Templates:** Structured report formats and proposal outlines that reduced manual effort while improving quality.

#### *What Stopped*

The team deliberately de-prioritized activities that consumed time without deepening relationships:

- **Mass communications:** Generic donor newsletters were replaced with personalized updates
- **Reactive forecasting:** "Ask for what they gave last year" was replaced with "ask based on capacity and interest"
- **Unstructured stewardship:** Ad-hoc thank-yous became formal reporting cycles with calendar reminders



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## The Journey: How Growth Actually Happens

### *The Mindset Shift*

The single most important change wasn't tactical. It was philosophical.

Atticus introduced a reframing that fundamentally altered how the team approached donors: **Serve donors for what you envision them giving, not what they've given before.**

This sounds simple, but it was revolutionary for a team conditioned to play it safe. It meant:

- Approaching a \$5,000 donor as a potential \$25,000 partner
- Contacting strangers with the same confidence as old friends
- Treating persistence as a sign of respect, not pestering
- Viewing asks as invitations to partnership, not transactions

One team member later reflected: *"We had been thinking of fundraising as 'can we get them to give again?' when we should have been asking 'what role could this person play in our mission?'"*

### *The Stranger Outreach Breakthrough*

The most significant gifts came from prospects Healing Waters had never met. This was new territory for a team that had always relied on warm introductions.

The process followed a consistent pattern:

**1. Profile Review:** Atticus delivered a detailed prospect profile showing capacity, giving history, values alignment, and contact information (often including personal cell numbers and social media).

**2. Strategy Session:** During coaching calls, the team and Atticus would discuss: Who should make contact? What's the entry point? What's the ask timeline? What could go wrong?

**3. Sequenced Outreach:** Rather than a single email, the team learned to create multi-touch sequences:

- Initial email introducing the organization
- Follow-up call
- Text message with relevant content
- LinkedIn connection or social media engagement
- Personalized video or field update
- Additional follow-ups at strategic intervals

**4. Coached Persistence:** When outreach didn't get immediate responses, Atticus coached the team to persist without desperation. One donor responded after seven touchpoints. Another after the team sent a personal note related to a social media post about climbing Mt. Everest.

**5. Relationship Development:** Once contact was established, the focus shifted to discovery: understanding the donor's interests, capacity, and timeline before making an ask.

#### *A Representative Story*

One prospect profile highlighted a foundation principal the team had tried to reach years earlier without success. The profile confirmed his contact details and revealed that his adult children were now active in giving decisions.

Armed with accurate information and coached by Atticus, the development director launched a thoughtful outreach plan. After seven touchpoints over several weeks, she connected with the principal's son (referred to here as "D"). He admitted her message had stood out among many requests.

The team proposed a set of project options in Haiti, Mexico, and Guatemala, aligned with family interests highlighted in the profile. When communication stalled, Atticus advised patience. Shortly after, the team noticed on social media that D was climbing Mt. Everest. Atticus consultants directed the development director to send a photo of herself and her son after summiting a Colorado 14er and helped craft a lighthearted message asking if he'd reviewed the proposal.

D responded immediately, reopening the conversation. The family ultimately committed \$86,000 for projects in Haiti and Guatemala.

The development director later said: *"Following up that many times felt awkward at first, like I might be a pest. But Atticus kept reminding me: persistence communicates care. That reframe changed everything."*



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### *The Scale Reality*

Not every profile led to a gift, and success didn't happen overnight. Of 59 prospects delivered in 2025:

- 23 responded (39%)
- 2 became donors, contributing 2 of the 6 gifts

The other 2 donors came from profiles delivered in 2023-2024. Initial outreach had begun but stalled. When the team adopted the systematic frameworks and coached persistence approach in January 2025, they successfully revived these relationships. The new strategy worked on both fresh prospects and previously cold leads.

Major donor fundraising isn't about single-year conversion rates. The same methods that unlocked breakthrough with earlier prospects also accelerated results with 2025 prospects. Patient cultivation with proper coaching and frameworks produces results that compound over time.

## The Results: What Changed in Nine Months

### *Quantitative Outcomes (January - October 2025)*

#### **From Atticus-identified prospects:**

- **New donors secured:** 4 major donor relationships
- **Major gifts received:** 6 gifts (2 donors gave twice)
- **Total revenue:** \$202,000
- **Gift range:** \$5,000 to \$100,000
- **Donor types:** 3 individuals, 1 family foundation
- **All from cold outreach:** 100% came from prospects with no prior relationship to Healing Waters

#### **Broader portfolio impact:**

The frameworks, coaching, and systems implemented through the Atticus partnership transformed fundraising operations beyond just stranger outreach. The same relationship management tools, forecasting methods, and confidence-building that enabled cold prospect success also improved cultivation and stewardship across the entire donor base.

### *Qualitative Outcomes*

**Pipeline transformation:** For the first time, Healing Waters maintains a structured pipeline of qualified major donor prospects with documented cultivation plans.

**Team confidence:** Staff no longer feel intimidated approaching high-net-worth individuals. They view themselves as offering partnership opportunities, not asking for favors.

**Sustainable systems:** The frameworks, templates, and CRM discipline implemented in 2025 remain in use, allowing the small team to manage an expanded portfolio without increasing headcount.

**Strategic positioning:** The organization successfully funded its first wave of piped water system projects, validating the expanded mission and creating proof points for future fundraising.



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### *What This Means for Similar Organizations*

The transformation at Healing Waters offers a proof of concept: small development teams can break through revenue plateaus without adding headcount if they:

1. Commit to systematic outreach to strangers
2. Build forecasts based on organizational need, not donor history
3. Implement relationship management frameworks like REPs
4. Maintain coached persistence through multi-touch sequences
5. Shift from maintenance mindset to growth posture

Organizations with compelling missions don't need massive development departments to achieve major donor growth from cold prospects. They need discipline, coaching, and the courage to approach strangers with confidence. And the systems that enable stranger success also elevate performance across the entire donor portfolio.



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## Lessons for Development Teams

### *Strategic Breakthroughs*

Five mindset shifts enabled Healing Waters' growth:

#### **1. Serve donors for potential, not precedent**

Stop asking "What did they give last year?" and start asking "What role could they play in our mission?" This single reframe unlocked larger asks and more ambitious cultivation.

#### **2. Donors want partnership, not transactions**

Reframing from "asking for money" to "offering partnership opportunities" changed tone, confidence, and results. Donors don't want to feel like ATMs; they want to solve problems alongside you.

#### **3. Customization scales better than mass communication**

Personalized engagement plans for individual donors produced better results than generic newsletters to hundreds. Even small teams can implement this by prioritizing their top 20-30 prospects.

#### **4. Forecasting is a strategic act, not an administrative task**

Building projections around desired growth, then working backward to identify required cultivation, transforms fundraising from reactive to proactive.

#### **5. Stewardship is part of the sales funnel**

Strong donor reporting and follow-up aren't administrative overhead. They're what fuel re-engagement and increased giving. Healing Waters formalized reporting cycles with calendar triggers, ensuring no donor went more than 90 days without contact.

### *Tactical Frameworks to Copy*

#### **Multi-Touch Outreach Sequences**

Healing Waters' most successful donor relationships began with 5-7 touchpoints before meaningful engagement. A typical sequence:

1. Initial email (brief organizational introduction, specific project highlight)
2. Follow-up email 5-7 days later (different angle or story)
3. Phone call (leave voicemail referencing emails)
4. LinkedIn connection or social media engagement
5. Text message with relevant content (field update, impact story)
6. Handwritten note or personalized video
7. Additional follow-up referencing something from the donor's world (social media, news mention, mutual connection)

#### **Relationship Engagement Plans (REPs)**

Create a one-page document for each major prospect that starts with understanding the person, not your organizational needs:

- Who is this donor? (Background, values, what motivates their giving)
- What matters to them? (Mission alignment, personal interests, giving patterns)
- How do they prefer to engage? (Communication style, decision timeline, involvement level)
- What connections exist between their passions and your work?
- Cultivation approach tailored to this individual (6-18 months typically)
- Specific touchpoints with dates and owners
- Potential project or program alignment
- What obstacles or concerns might we need to address?
- Next three actions to deepen understanding and relationship

Review REPs weekly in development huddles. Update after every interaction.

## Forecasting for Growth

Replace "last year plus 5%" with:

1. Identify organizational funding needs for the coming year
2. Set aggressive but achievable revenue targets
3. Assign dollar amounts to donor segments (existing, lift, new)
4. Calculate required number of asks to reach targets (assuming realistic conversion rates)
5. Work backward to determine required cultivation activities
6. Build quarterly activity goals (profiles to review, outreach attempts, discovery meetings, asks)

## Stewardship Automation

Use CRM triggers to:

- Schedule 30-day thank-you calls after every gift
- Require 90-day impact reports for gifts over \$10,000
- Set annual re-engagement touchpoints for lapsed donors
- Prompt discovery meetings before solicitation conversations
- Flag donors approaching 180 days since last contact

### *What Won't Work*

Healing Waters' success came from systematic implementation, not magic. Three things that won't work:

**Prospect research without follow-through:** Having profiles doesn't matter if outreach is inconsistent or poorly sequenced.

**Coaching without implementation:** Strategy sessions are worthless without the discipline to execute between meetings.

**Activity without persistence:** Single-touch outreach rarely works. Major gifts come from sustained, thoughtful engagement over months.

## The Partnership Model: When to Consider External Support

Healing Waters' story raises a practical question for development leaders: when does external coaching and research support make sense?

Consider this approach if:

**Your team has capacity constraints but mission growth demands**

Small teams with ambitious goals often can't build major donor capacity from scratch while maintaining current operations.

**You lack major donor expertise internally**

Coaching accelerates learning dramatically. Healing Waters compressed years of trial-and-error into nine months of coached practice.

**You need pipeline velocity**

Prospect research that would take your team 100 hours per prospect can be delivered in days, freeing your team for relationship building.

**You value accountability and structure**

Regular consulting sessions force prioritization, maintain momentum, and prevent the urgent from consuming the important.

**Your donor base needs expansion**

Organizations overly dependent on a small group of long-time supporters need systematic stranger outreach to achieve sustainable growth.

### *The Long-Term Investment*

The value of strategic partnership extends far beyond trackable stranger gifts. The frameworks implemented to enable cold outreach also transformed how the team approaches existing donors, lapsed supporters, and warm prospects. The coaching that built confidence for stranger calls also elevated discovery conversations across the portfolio. The CRM discipline that tracked cold outreach also improved stewardship for long-time donors.

For small teams, this model can provide expertise that takes years to build internally while preserving headcount flexibility during organizational transitions. The investment is in building permanent capacity, not hiring temporary help.

## Conclusion: From Maintenance to Momentum

Healing Waters International began 2025 with a two-person development team that had never cultivated a major gift from a previously unknown prospect. Nine months later, they had secured gifts from four new major donors and built a systematic approach to pipeline development that will serve them for years.

The transformation wasn't about working harder. The team was already working hard. It was about working differently:

- Replacing hope with strategy
- Replacing hesitation with coached confidence
- Replacing reactive forecasting with growth-oriented goals
- Replacing mass communication with personalized cultivation
- Replacing isolation with partnership

The technical frameworks matter (REPs, forecasting models, CRM discipline, multi-touch sequences), but the mindset shift mattered more. When the team began viewing donors as partners rather than accounts, and persistence as respect rather than pestering, everything changed.

For development professionals at small to mid-sized nonprofits, Healing Waters' story offers a replicable model. You don't need a large team to achieve major donor growth. You need:

1. Systematic stranger outreach
2. Relationship management frameworks
3. Forecasting discipline
4. Multi-touch persistence
5. External coaching or accountability
6. The courage to ask based on potential, not precedent

The water crisis Healing Waters addresses won't be solved with small thinking. Neither will most missions worth pursuing. Growth requires breaking through the comfort of maintenance mode into the discomfort of systematic expansion.



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## About This Case Study

This case study was developed with the full cooperation of Healing Waters International leadership and documents actual results from January - October 2025. Donor names have been changed to protect privacy. For organizations interested in exploring similar partnership models, contact Atticus at [sales@atticustechnology.com](mailto:sales@atticustechnology.com) or learn more at [atticustechnology.com](http://atticustechnology.com).

**Healing Waters International** exists to end the global water crisis by bringing safe, sustainable water to communities that are often overlooked. Their model equips communities to establish and self-operate community-wide water systems, ensuring long-term impact through local ownership. Today they are expanding from kiosk-based distribution to piped systems that deliver clean water directly into homes across remote villages in Central America and the Caribbean. Learn more at <https://healingwaters.org>.

**Atticus** partners with nonprofit organizations to expand their major donor reach through prospect research, strategic consulting, and donor engagement coaching.



## Appendix: Development Team Playbook

If you're facing a similar plateau:

### **Within the next week:**

- Calculate your organization's 3-year revenue trend (flat, declining, or growing?)
- Identify your dependence ratio (what % of revenue comes from your top 10 donors?)
- List the number of qualified major donor prospects in active cultivation
- Review your forecasting method (is it based on last year's results or future potential?)

### **Within the next month:**

- Create REPs for your top 10 donor prospects
- Build a multi-touch outreach sequence for one cold prospect
- Implement weekly development huddles with clear agendas
- Audit your CRM for missing next steps and stewardship gaps

### **Within the next quarter:**

- Develop a growth-oriented forecast for next year's revenue
- Identify capacity gaps preventing you from executing that forecast
- Research external partnership options if internal capacity is insufficient
- Test stranger outreach with at least 20 prospects

Breaking plateaus doesn't happen accidentally. It happens when teams decide that maintenance mode no longer serves their mission, then commit to the systematic work of building something different.