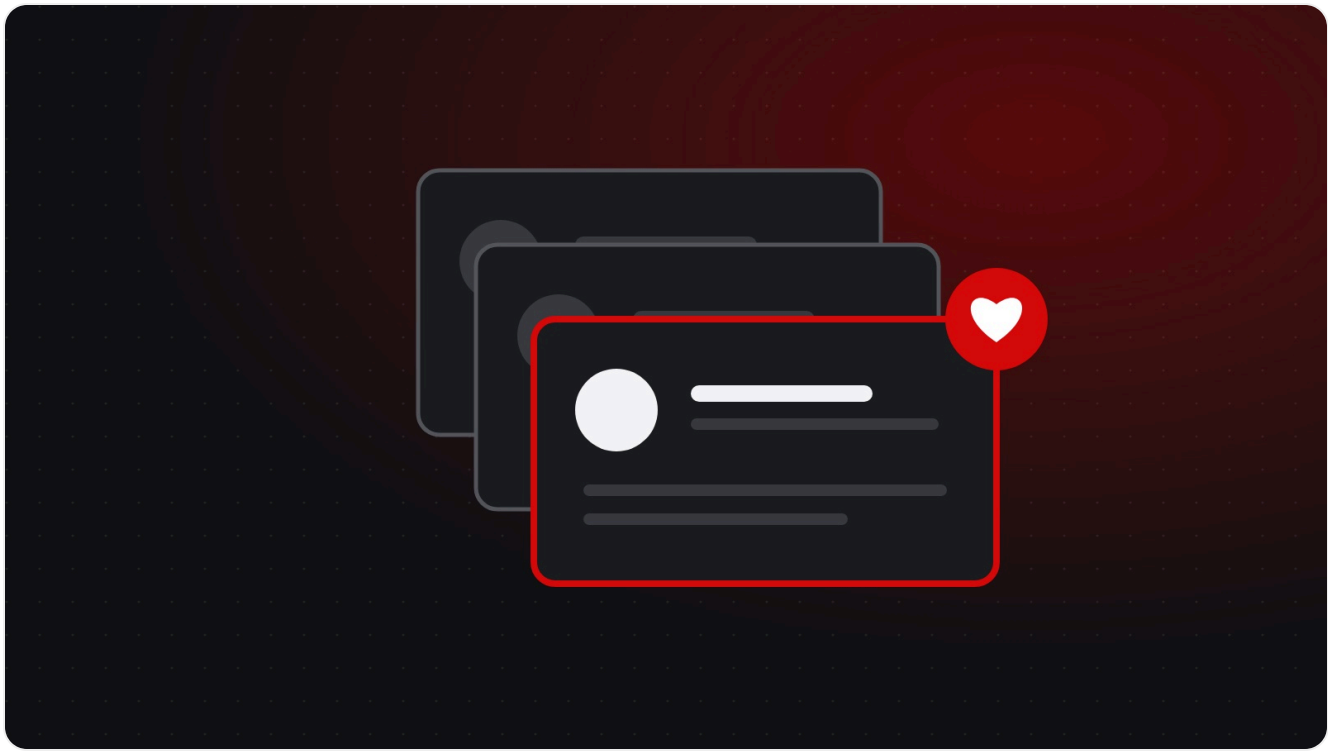
Issue 011 • MINISTRIES & AI · PART 4 • AUGUST 31, 2026 • 6 MIN READ

AI Will Not Replace the Cultivation of Your Donors. It Will Help You Deepen It.



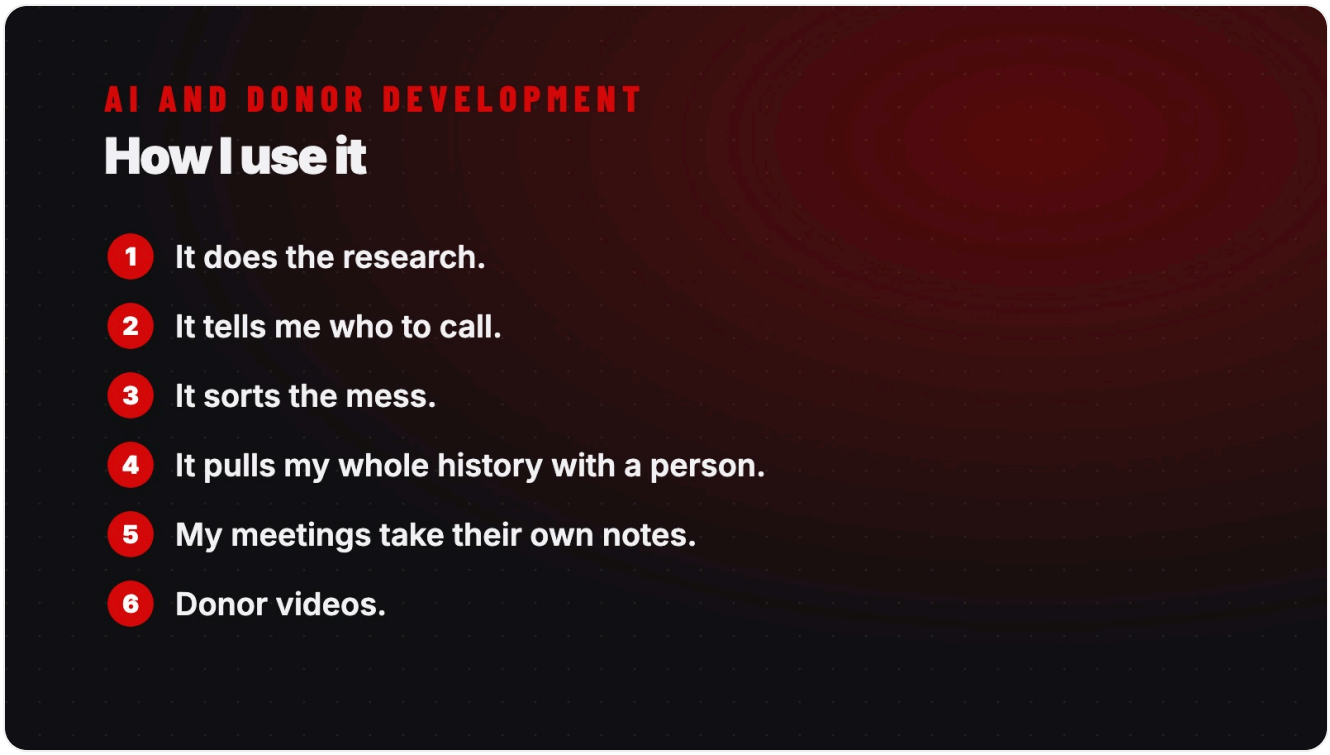
By Tommy Lee



The fear I hear about AI and fundraising is that it is going to make the whole thing cold, fake, and impersonal. Authenticity is the key to success in fundraising, but creating an AI program to help you with donor development seems inauthentic? Can it be done? Will it be good? I would argue that it can be done, but not if you think it will just help you write letters and send emails and not require any cultivation effort on your part. You still need to do the work, but the AI platform will allow you to be much more efficient than you are now.

Most people think the hard part of donor work is the relationship. It's actually not. The cultivation part, once you have built the relationship, is the easy part. The harder part is everything around it. Identifying the right contact. Remembering who you talked to and what they care about. What you promised them. Who you still owe a follow up. It's also finding out who potential new donors are.

Here's how I have used AI for donor development in the last year.



- **It does the research.** Before I sit down with someone, I can have AI pull together a quick background on them. Who they are, what they have given to, what they care about. I am so passionate about this, I am building a tool that will better refine this process in the future.
- **It tells me who to call.** I can hand it my whole list and have it flag the one or two people I should follow up with this week. If you use Claude, ChatGPT, or Gemini and use the Google platform, you can tell it to add it into your calendar and then send you all the notes from past conversations. Create filters and direction to allow the AI to prioritize the donors you need to call. In fact, create a fundraising subagent, give it a name, and then ask this subagent to give you two or three names each week for you to follow up and call. Subagents on Claude are very helpful.

- **It sorts the mess.** Give it a pile of numbers and it allows you to sort information easily and look at trends easily. Compile all the numbers to see the percentage of church giving, monthly giving, or major donors. Ask it to analyze the data and give you key trends to note and help develop a strategy around it. Also use this same process to gather data on your results to report to donors. Push it past reporting into spotting problems too. Ask it to find your lapsed donors, the ones who gave last year and nothing this year, the giving that is slipping, and the quiet major donors who could give more. For example, show me everyone whose giving dropped more than 20 percent in the last year.
- I would also recommend that you use it for reporting progress and results as well. For instance, you have a discipleship program to a certain region of a city or country. How many people have been part of it? How are they finding out about it? What are they doing after the program? Is it more men and women? What industry do they work in? What is the number of people in that potential and what percentage are you working with? What did it cost per person? What happened to them a year later? What is our goal for next year and the gap to get there? AI can pull and now analyze all of this information. Those last questions connect the data straight to the ask, which is what a donor actually wants to see.
- **It pulls my whole history with a person.** It can go through my email and gather up every interaction I have had with somebody, every thread, every note, and lay it all out in one place. So before a call, I am not scrolling back through two years of email trying to remember what we said and what I promised.
- **My meetings take their own notes.** When a call ends, the summary and the follow ups are already there waiting for me if you are using Zoom or Microsoft Teams. They all have that capability these days, so use it. I also like using Fireflies.ai to help me with the transcription of the meeting. Or if it's a face to face, I would recommend that you record the notes on your phone as a voice memo, upload the file, and then transcribe it with notes and action items to put into your CRM.
- **Donor videos.** There are more and more tools that will allow you to create videos to report to donors. This could be testimonials and interviews, but also videos with B roll footage and music. Even if you are a small or medium sized organization with limited resources, you are now able to easily create this. The tools have gotten pretty easy to use and they are not cheesy. Even graphic design capabilities are now available if you are a small organization lacking resources to hire for design. And remember, one shoot gives you many pieces. A single field interview can become a 60 second thank you for a major donor, a 15 second clip for social, and a still with a quote for the newsletter. My favorite move is a short personalized video for a top donor with their name on the screen and a simple message, here is what your gift did this year. It lands harder than any letter and now it takes minutes to make.

The one thing I do not do is that I do not let AI write and send my donor emails. It’s just not done well and you can spot an AI generated thank you letter or email easily.

Tommy

Issue 011 · Ministries & AI, Part 4 · August 31, 2026



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