



BUSINESS PLAN · INDIA

Fundraising and Donor-Management Agency

Donor acquisition and CRM services

NONPROFIT

AISEVAK.IN · BY ABL DIGITAL TECHNOLOGIES

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This document is confidential and prepared for planning purposes. All financial figures are illustrative model assumptions for an Indian MSME context and must be validated against live quotes, local rates and professional advice before any investment or borrowing decision.

1. Executive Summary

This plan sets out a **Fundraising & Donor-Management Agency** in India — a **for-profit service business** that helps NGOs/non-profits raise & retain funds through donor acquisition (face-to-face, tele-fundraising, digital/performance marketing), donor CRM/management, campaigns & retention. Unlike the NGOs it serves, this **is a commercial, profit-making services firm**: it earns **fees, retainers, commissions or success-fees** from NGO clients, and is modelled here on the normal for-profit P&L. It monetises the sector's need for professional, scalable fundraising as Indian philanthropy & the NGO ecosystem grow.

NGOs need to raise money efficiently but often lack in-house fundraising capability, technology or scale — so they outsource donor acquisition, campaigns & CRM to specialist agencies. A fundraising agency is a **marketing/services + technology business** serving the social sector: it acquires donors for NGO clients (F2F, tele, digital), manages donor relationships/retention (CRM), runs campaigns, & is paid via **retainers, per-donor/acquisition fees, % of funds raised (within ethical norms) or SaaS/CRM fees**. Success rests on donor-acquisition efficiency (cost-per-donor, donor LTV/retention for clients), channel capability, technology, NGO relationships & a repeatable engine — it is a for-profit, acquisition-, retention- & client-driven services business.

This is a for-profit services business — funded by promoter equity plus working capital. This plan models a fundraising agency requiring **₹80 lakh** (₹30 lakh promoter + ₹50 lakh bank/WC finance), targeting **₹4 crore** revenue in Year 1 and **₹11 crore** by Year 3. (*Fundraising/donor-management agency; FOR-PROFIT service — fees/retainers/commission/success-fee, acquisition/retention/client-driven — figures illustrative; serves the social sector.*)

2. Business Description, Vision & Legal Structure

Concept: A for-profit fundraising & donor-management agency serving NGOs - donor acquisition (F2F/tele/digital), donor CRM/retention, campaigns - earning fees/retainers/commission/success-fees.

Vision: To power the social sector with professional, effective, ethical fundraising.

Mission: Help NGOs raise & retain more funds - efficient acquisition, strong donor relationships & technology - profitably & ethically.

Legal structure options

- **Private Limited / LLP** — for-profit services firm; recommended for scale, NGO clients, tech & funding.

Regulatory anchor: a fundraising agency is a for-profit services business (company/LLP, GST on services, service contracts with NGOs, data-privacy/DPDP for donor data, ethical-fundraising norms, no misrepresentation; commission/success-fee structured ethically & per client/regulatory norms). Donor-acquisition efficiency, retention (client donor LTV), channel/tech capability, NGO relationships & a repeatable engine determine success — a for-profit, acquisition-, retention- & client-driven services business.

3. Promoter & Ownership

Led by a promoter with fundraising, marketing, social-sector or agency expertise & NGO relationships. The team includes donor-acquisition (F2F/tele/digital teams), donor-CRM/retention, campaigns/creative, technology & account management/BD. Donor-acquisition efficiency, retention, channel/tech capability & NGO relationships are the differentiators. Ownership & stakes are editable inputs; this is a for-profit firm.

4. Market Analysis — India

India's growing philanthropy, NGO ecosystem, CSR & digital giving create rising demand for professional fundraising services — NGOs need efficient donor acquisition, retention & CRM but lack in-house scale. Demand is NGO-/philanthropy-/digital-giving-driven. The market rewards donor-acquisition efficiency, retention, channel/tech capability, ethics & NGO relationships; it is client-, efficiency-, channel- & ethics-sensitive, met with acquisition, retention, tech & relationships.

Demand drivers

- **Growing NGO ecosystem & philanthropy.**
- **NGOs outsourcing fundraising** (lack scale/tech).
- **Digital giving & donor-CRM** growth.
- **Donor retention & LTV** focus.
- **Professionalisation of the sector.**

Market sizing (illustrative framing)

Layer	Definition	Indicative scale
TAM	Fundraising services in India	Growing
SAM	NGO segment & channels	Substantial
SOM (Yr 1-3)	NGO clients / donors acquired	Scaling

Target clients

- Mid-large NGOs (donor acquisition/retention).
- Growing NGOs (fundraising outsourcing).
- NGOs needing donor-CRM/tech.
- Campaign/crisis fundraising clients.

5. Competition & Competitive Advantage

Landscape: other fundraising agencies, F2F/tele agencies, digital-marketing agencies, donor-CRM SaaS & NGOs' in-house teams. The agency competes on donor-acquisition efficiency (cost/quality), retention/LTV for clients, channel mix, technology, ethics & NGO trust.

The business's edge

- **Donor-acquisition efficiency (cost/quality).**
- **Retention & donor LTV (for clients).**
- **Multi-channel (F2F/tele/digital) & tech.**
- **Ethics & NGO trust/relationships.**
- **Donor-CRM/technology & analytics.**

6. Products & Revenue Model

Stream	Model	Basis
Donor acquisition (F2F/tele/digital)	Per-donor / campaign fee	Core
Retainers (managed fundraising)	Monthly retainer	Recurring
Success-fee / % of funds (ethical)	% of funds raised	Upside
Donor-CRM / SaaS	Subscription	Recurring/tech
Campaigns / creative / consulting	Project fee	Margin

Revenue is **for-profit fees** — donor-acquisition (per-donor/campaign), retainers (recurring managed fundraising), ethical success-fees (% of funds raised), donor-CRM SaaS & campaigns/consulting. Economics = clients × fees × margin (net of acquisition/channel cost); donor-acquisition efficiency, retention, channel/tech & NGO relationships drive it — the decisive fundraising-agency levers (a normal services P&L).

7. Go-to-Market — Clients & Channels

- **NGO client BD** (mid-large/growing NGOs).
- **Donor-acquisition track record** (efficiency/quality).
- **Multi-channel & tech** (F2F/tele/digital/CRM).
- **Retention/LTV results** (client value).
- **Retainers & SaaS** (recurring).

Sales approach

Win NGO clients (efficiency/track record) → acquire & retain donors for them (multi-channel + CRM) → demonstrate donor LTV/ROI → convert to retainers & SaaS (recurring) → grow clients & channels. Donor-acquisition efficiency, retention, tech & NGO relationships build a profitable, recurring services business.

8. Operations Plan (services + tech)

- **Donor acquisition:** F2F teams, tele-calling, digital/performance marketing, campaigns.
- **Donor CRM & retention:** donor database/CRM, communications, retention/upgrade programmes.
- **Technology:** donor-CRM platform, analytics, campaign tools, payment/giving integration.
- **Account management:** NGO client servicing, reporting (ROI/LTV), compliance/ethics.
- **Ethics & data:** ethical fundraising, DPDP/donor-data privacy, no misrepresentation.

Workflow

Stage	Activity	Metric
Win client	NGO BD/contract	Clients
Acquire	F2F/tele/digital	Donors/cost-per-donor
Retain	CRM/communications	Retention/LTV

Report	ROI/LTV to client	Client value/renewal
Grow	Retainers/SaaS	Recurring revenue

9. Regulatory, Licences & Compliance (India)

- **Entity:** company/LLP (for-profit); GST on services; PAN/TAN.
- **Contracts:** NGO service agreements; commission/success-fee (ethical/per norms); SLAs.
- **Data & ethics:** DPDP/donor-data privacy; ethical fundraising; no misrepresentation.
- **People:** payroll/labour (F2F/tele teams).

10. Organisation & Manpower Plan

Role	Yr 1	Yr 2	Yr 3
Promoter / leadership	1	2	3
Donor-acquisition teams (F2F/tele/digital)	20	45	85
Donor-CRM, retention & campaigns	4	9	16
Technology & analytics	3	6	10
Account management, BD & admin	4	8	13
Total	32	70	127

11. Implementation Timeline & Milestones

Phase	Timeline	Milestone
Setup	Month 0-2	Entity, teams, CRM/tech, first NGO clients
Ramp	Month 2-7	Donor acquisition, retention, retainers
Traction	Month 7-12	Clients & recurring; ₹4cr revenue
Expand	Year 2	More clients/channels/SaaS, ₹7.5cr
Scale	Year 3	₹11cr revenue; recurring & tech

12. Financial Plan (Illustrative — for-profit P&L)

All figures are illustrative model assumptions for an Indian context, shown so the promoter can replace them with live rates. They are not projections of guaranteed results. This is a FOR-PROFIT services business (normal P&L); donor-acquisition cost, retention/LTV for clients, channel mix & recurring revenue drive economics.

12.1 Project cost & means of finance

Capital requirement	₹
Working capital (salaries + acquisition runway)	40,00,000

Technology (donor-CRM/platform) & setup	20,00,000
Office, teams & onboarding	12,00,000
Brand, BD & pre-operative	8,00,000
Total project cost	80,00,000
Promoter contribution	30,00,000
Bank / WC finance (MSME)	50,00,000

12.2 Projected Profit & Loss (3 years)

Particulars	Year 1	Year 2	Year 3
Donor acquisition (fees/campaigns)	2,40,00,000	4,20,00,000	6,00,00,000
Retainers & success-fees	1,20,00,000	2,50,00,000	3,60,00,000
Donor-CRM/SaaS & consulting	40,00,000	80,00,000	1,40,00,000
Total revenue	4,00,00,000	7,50,00,000	11,00,00,000
Acquisition teams & salaries	2,20,00,000	4,00,00,000	5,70,00,000
Channel/marketing & acquisition cost	70,00,000	1,30,00,000	1,90,00,000
Technology, office & overheads	70,00,000	1,25,00,000	1,80,00,000
Interest & other	8,00,000	12,00,000	16,00,000
Total expenses	3,68,00,000	6,67,00,000	9,56,00,000
Net profit (before tax)	32,00,000	83,00,000	1,44,00,000
Net margin	8%	11.1%	13.1%

12.3 Unit economics & break-even

- **Clients × fees × margin:** donor-acquisition fees + retainers + SaaS/consulting; acquisition cost (channel/teams) is the big variable; retention/LTV (for clients) & recurring retainers/SaaS lift margin & stickiness.
- **Acquisition efficiency & retention:** cost-per-donor & donor LTV/retention delivered for NGO clients are the make-or-break — good results win renewals, retainers & referrals; a normal services-firm efficiency game.
- **Break-even:** at a client/revenue threshold covering teams, acquisition & overheads; margins healthy for services, improving with retainers, SaaS & scale.

12.4 Projected Cash Flow — Year 1 (quarterly, illustrative)

Particulars (₹)	Q1	Q2	Q3	Q4
Opening balance	8,00,000	7,20,000	7,40,000	7,80,000
Fee & retainer collections	80,00,000	98,00,000	1,10,00,000	1,18,00,000
Teams, acquisition & operating	80,80,000	97,80,000	1,09,60,000	1,17,20,000
Closing balance	7,20,000	7,40,000	7,80,000	8,60,000

A for-profit services firm with team/acquisition-cost-led spend & NGO-client receivables. Retainers (recurring/advance), acquisition efficiency, retention results, SaaS & a WC line manage cash; the key risks are acquisition-cost/efficiency, client concentration/churn, ethics/data-compliance & receivables — met with efficiency, retention, recurring retainers/SaaS & client diversity.

12.5 Key Performance Indicators to Monitor

- **Acquisition:** cost-per-donor; donors acquired; channel efficiency.
- **Retention/value:** donor retention/LTV (for clients); client renewal.
- **Revenue:** retainer/SaaS recurring share; clients; ARPU.
- **Finance:** revenue/employee; net margin; receivable days.

13. Funding Requirement & Bankability

Total ask: **₹50 lakh bank/WC finance** against ₹30 lakh promoter contribution — working capital (teams/acquisition) + technology, MSME-eligible. As a **for-profit services firm**, bankability rests on client base, donor-acquisition efficiency, retention/recurring revenue & margins; the growing NGO/philanthropy sector supports demand. Year-1 profit ~₹32 lakh growing to ₹1.44 crore supports servicing; acquisition efficiency, retention & recurring revenue are key. Donor-acquisition efficiency, retention, tech & NGO relationships underpin the model.

13.1 Funding utilisation

Use of funds	₹	% of total
Working capital (salaries + acquisition runway)	40,00,000	50%
Technology (donor-CRM/platform) & setup	20,00,000	25%
Office, teams & onboarding	12,00,000	15%
Brand, BD & pre-operative	8,00,000	10%
Total	80,00,000	100%

14. Risk Analysis & Mitigation

Risk	Mitigation
Acquisition-cost / efficiency	Channel optimisation, retention/LTV, digital, analytics
Client concentration / churn	Diversify NGO clients, retainers/SaaS, results/renewals
Ethics / data (DPDP) compliance	Ethical fundraising, DPDP, no misrepresentation, governance
Team attrition (F2F/tele)	Incentives, training, retention, tech
Receivables / WC	Retainers/advances, credit discipline, WC line

15. SWOT Analysis

Strengths Growing NGO/philanthropy demand; recurring retainers/SaaS; multi-channel + tech; for-profit scalability; sector expertise.	Weaknesses Acquisition-cost-/efficiency-dependent; client concentration/churn; team-attrition; ethics/data-critical.
Opportunities NGO fundraising outsourcing; digital giving; donor-CRM SaaS; retention/LTV; sector professionalisation.	Threats Competition (agencies/in-house); acquisition-cost inflation; ethics/data scrutiny; NGO-funding cycles.

16. Recommended AiSevak Tools for This Business

This fundraising agency would use AiSevak's Nonprofit vertical tools in delivery:

- **Fundraising ops:** donor-acquisition/channel & donor-CRM/retention, campaign/analytics & cost-per-donor/LTV tools.
- **Business ops:** NGO-client-CRM/contracts & DPDP/ethics, GST & receivable tools (with Media & Finance verticals).
- **Practice:** Business Plan, acquisition/retention/recurring and Break-even tools to model the agency.

17. Key Assumptions & Notes

- Fundraising/donor-management agency is a FOR-PROFIT services business serving NGOs (uses normal P&L, not the non-profit adaptation) — fees/retainers/commission/success-fees; profit-making.
- Clients × fees × margin; donor-acquisition efficiency (cost-per-donor), retention/LTV (for clients), channel/tech & recurring retainers/SaaS are the levers.
- Company/LLP + WC (MSME); GST-on-services, NGO service contracts, DPDP/donor-data, ethical fundraising.
- Acquisition efficiency, retention, recurring revenue & NGO relationships drive economics; figures illustrative, exclude GST; serves the social sector but is itself for-profit.

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