



Margaret[®]

YOUR FUNDRAISING EXPERT

POWERED BY HUDSON | FERRIS





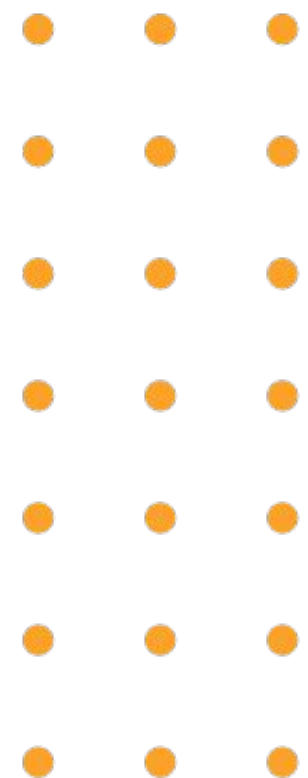
PCI Compliance



Support



SSO



Housekeeping 🧹

1

Ask questions. This should be as useful as possible for you and for your organization, so please use the Q&A box!

2

Please talk to me! We love seeing what you have to say during the session. Use the chat box to talk to us and each other.

3

Yes, we are recording this webinar! You'll receive an email tomorrow containing a link to this session, the slides, and a transcript. It'll also include links to some helpful resources!

Meet Margaret

On-demand fundraising support
from the Hudson Ferris team,
available as an add-on to your
Neon CRM subscription.

UNLIMITED REQUESTS

24-HOUR RESPONSES

REAL FUNDRAISERS

TODAY

What we will cover

01

What Margaret is

Who answers your requests, and what they cover.

02

How a request works

Submit, review, and receive responses inside your portal.

03

What is included

And the deliverables you can add as needed.

04

Getting started

Your first week, step by step.

05

Questions

THE PRODUCT

Margaret is on-demand, human fundraising support from Hudson Ferris.

“Neon helps you manage your donor relationships. Margaret helps you raise more money from them.”

Prospecting & Pipeline

Who to prioritize, and what to do next.

Grant Strategy

Funder fit and proposal development.

Development Operations

Structure, systems, and workflow.

Board Engagement

Readiness and member coaching.

Communications

Appeals, messaging, solicitation language.

Margaret does not replace Neon CRM. It helps organizations use the system and the data they already have.

WHY IT MATTERS

You have the data. Acting on it is the hard part.

“We have plenty of donor records in Neon, but we do not know who to focus on first.”

“We found a grant opportunity, but we do not have the capacity to write the proposal.”

“Our board wants to help, but they need structure and coaching.”

Margaret is built for exactly these moments: the question you don’t want to let sit, and the work your team knows matters but rarely gets to.

FROM SUBSCRIBERS

What organizations tell us



NANDA PRABHAKAR

Executive Director, The Opportunity Hub
Neon One and Margaret subscriber

“Having Margaret in our corner has been incredibly helpful, especially given recent staffing shifts.”

BRIDGE STREET DEVELOPMENT CORP.

“Thank you for the donor profile! This is exactly what I was looking for.”

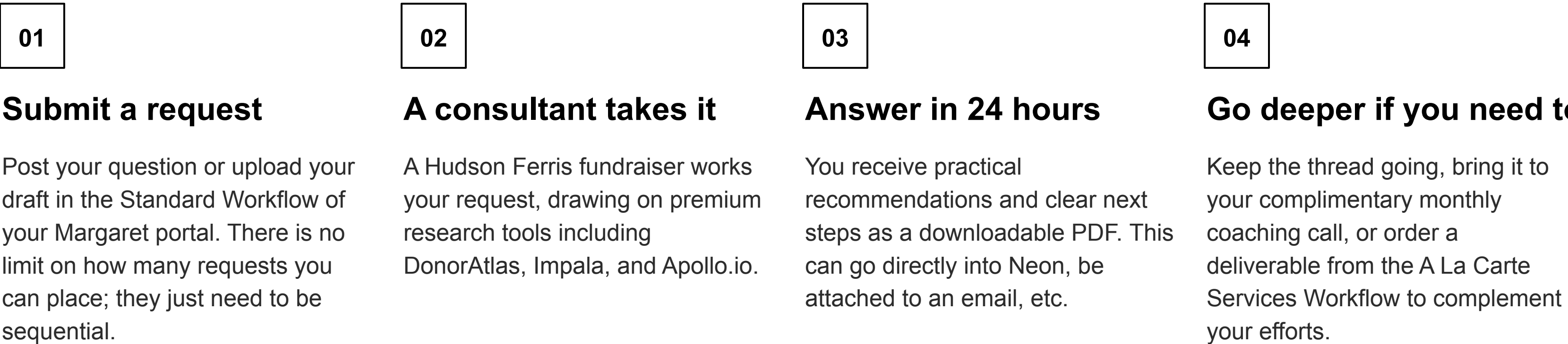
HOT BREAD KITCHEN

Three Comparisons to Keep in Mind

VS. CHATGPT / CLAUDE AI gives you words. Margaret gives you fundraisers who stand behind every answer. A chatbot drafts instantly, then a user needs to fact-check hallucinated funders and stale figures. Margaret’s answers come from people using verified donor data, and they are accountable for them.	VS. INSTRUMENTL & GRANT TOOLS They organize the grant search. Margaret tells you what is worth pursuing, then helps win it. Grants-only platforms start around \$299/mo. and still require your staff to search, assess, and write. Margaret covers grants plus individuals, board, campaigns, and communications.	VS. HIRING A CONSULTANT The same caliber of consulting, without the contract or the scoping process. Retainers run \$2,500-\$30,000+/mo. on scoped hours and scheduled check-ins. Margaret <i>is</i> Hudson Ferris consultants: month to month, unlimited requests and answers in 24 hours.
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HOW IT WORKS

From request to response, inside your portal



ONE SUPER USER

Your whole team has access to Margaret; one super user submits all requests for the organization.

THE WALKTHROUGH

From intake to answer

KICK-OFF · ONCE

- 1 The Portal Home
- 2 Intake Form
- 3 Schedule Kick-Off Call

REQUEST · EVERY QUESTION

- 4 Ask Margaret
- 5 Do you need to submit any files with your request?
- 6 Margaret's Response
- 7 Have we completed your request?

ALWAYS AVAILABLE

- Chat
- Meetings
- Files

The Ascend Bridge Program

A two-year post-secondary success program for first-generation college students in Newark, NJ — coaching, emergency micro-grants and employer placement from senior year of high school through sophomore year of college.

\$1.2M

Annual budget

180

Students in the cohort

84%

Persistence rate

600

Individuals on file

The Portal Home

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Inspire Change- Neon One

CG

I

HF

...

Flow

Files

Kick-Off

Completed

✓

 Intake Form
Completed

I

✓

 Schedule Kick-Off Call
Completed

HF

Chat

Meetings

Aug 17

10:45 AM

Started

 Inspire Change- Neon One

 August 19, 2026, 10:45 AM

10:46 AM

Ended

 Inspire Change- Neon One

 August 19, 2026, 10:46 AM

Monday

1:39 PM

Started

 Inspire Change- Neon One

 September 21, 2026, 1:39 PM

1:39 PM

Ended

 Inspire Change- Neon One

 September 21, 2026, 1:39 PM

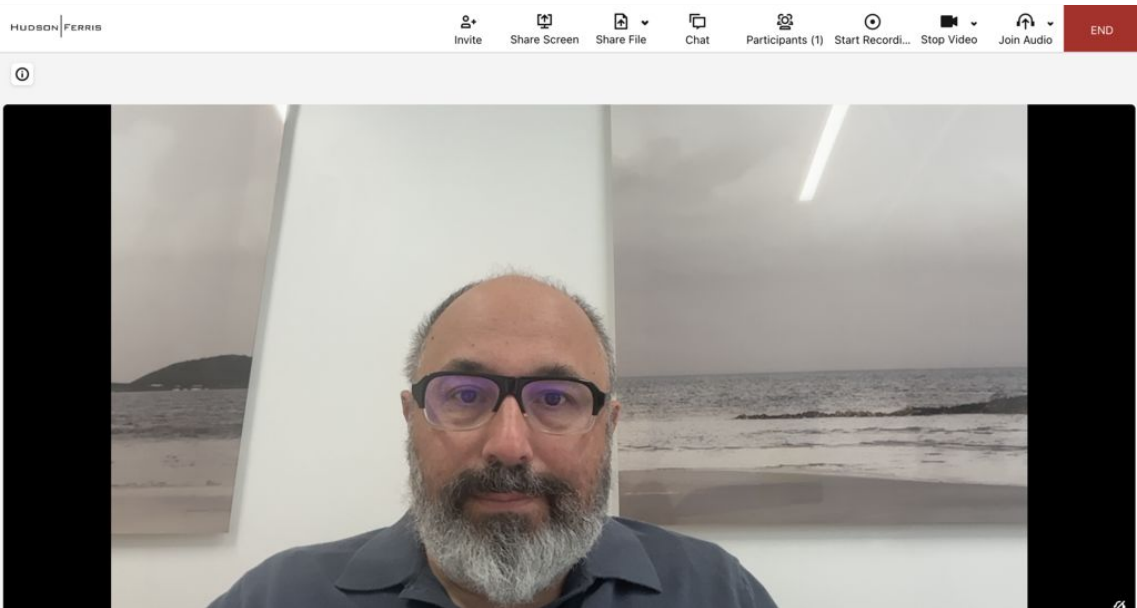
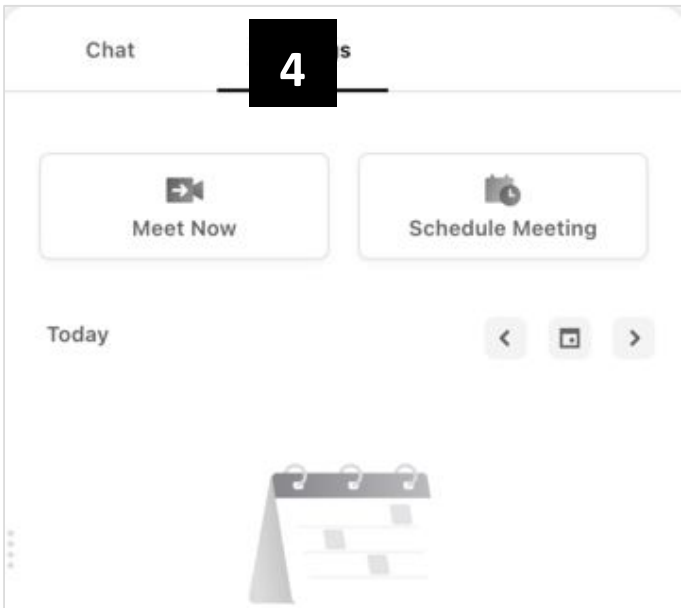
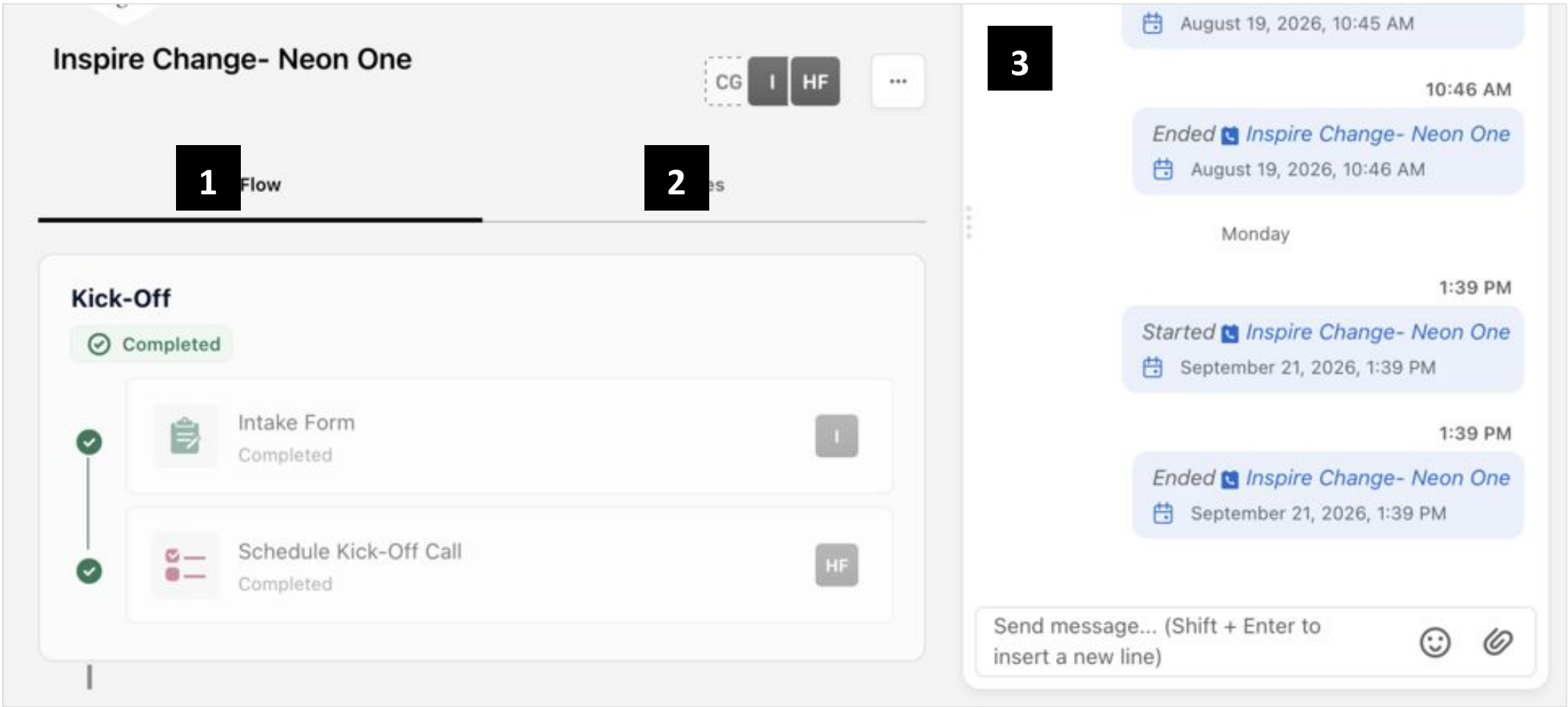
Send message... (Shift + Enter to insert a new line)



STEP 1

The Portal Home

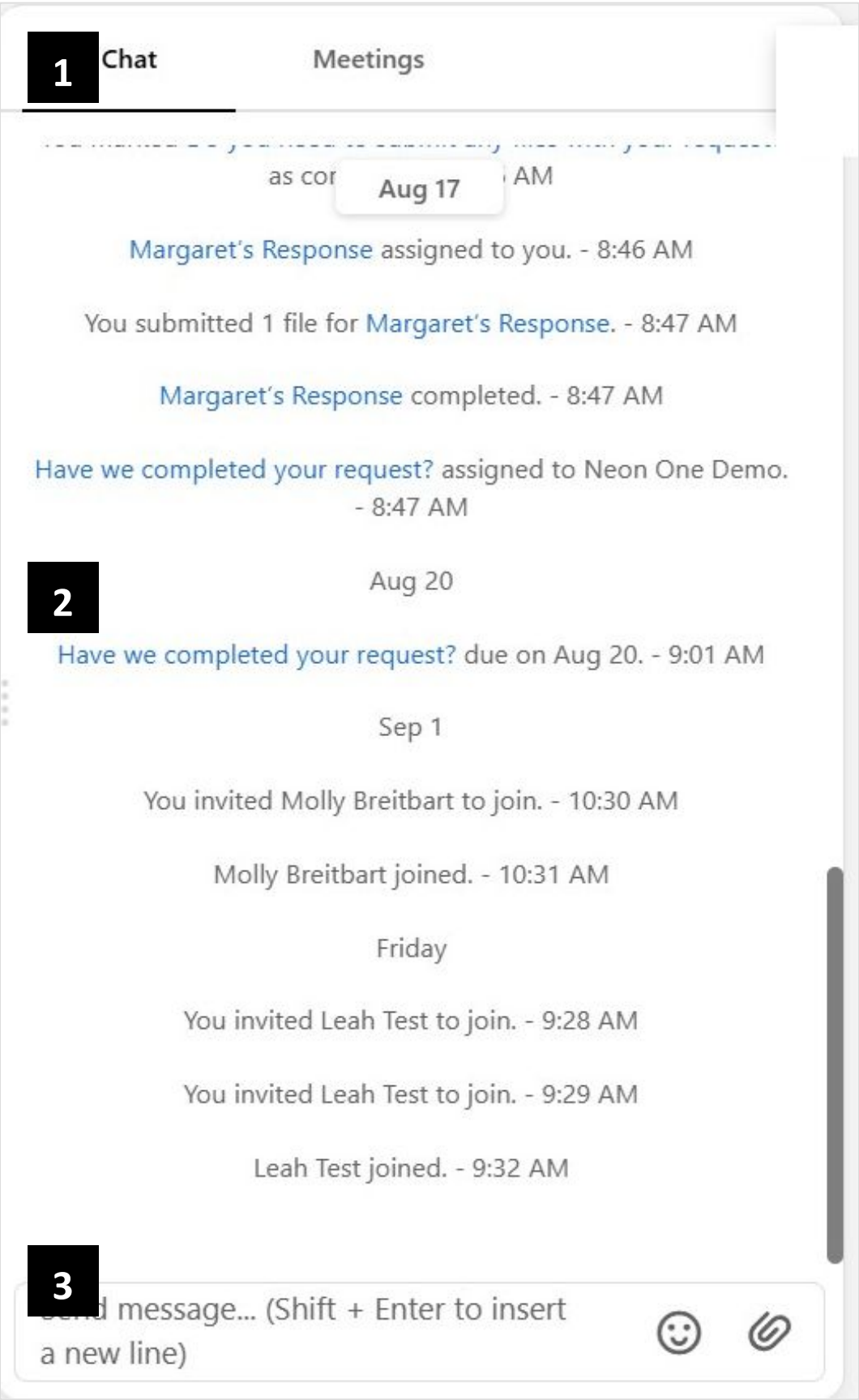
- 1 Flow — the steps, grouped into Kick-Off and Request.
- 2 Files — every form you submit and every document the team delivers.
- 3 Chat — a dated log of everything, plus direct messages to the team.
- 4 Meetings — meet now or schedule; video calls run inside the portal.



ALWAYS AVAILABLE

Chat and Meetings

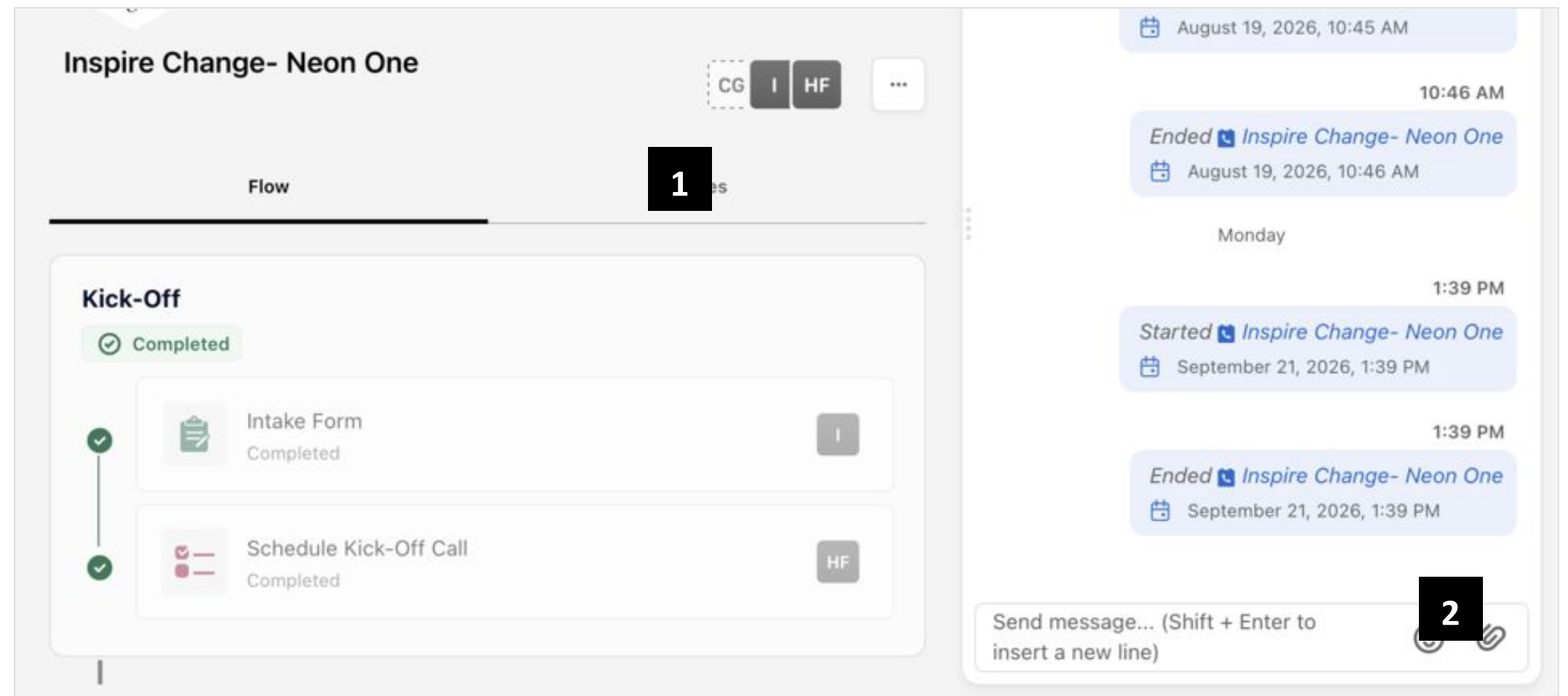
- 1 Chat and Meetings sit beside the workflow at all times.
- 2 Serve as a dated log of every action, file and team member invited.
- 3 Use Chat to message the team directly — this is where you suggest dates for a Coaching Call, ask about platform navigation, etc.



ALWAYS AVAILABLE

The Files Tab

- 1** Click Files, next to Flow, at the top of your workspace.
 - Find every form you have submitted.
 - Find every document the team has delivered.
 - Add, Open, or download any file at any time.
- 2** To send the team a file, you can also use the paperclip icon in the chat box.



STEP 2 · KICK-OFF

The Intake Form

A one-time briefing so every answer is tailored to your organization.

- Organization name · History and mission
- Population served · Current budget
- Programmatic goals · Peer organizations
- Collateral uploads · Impact numbers
- Theory of Change or Logic Model

The Ascend Bridge Program

4

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Flow

Files

Kick-Off

✓

Completed

✓

2

Intake Form

Completed

HF

✓

✓

—

Schedule Kick-Off Call

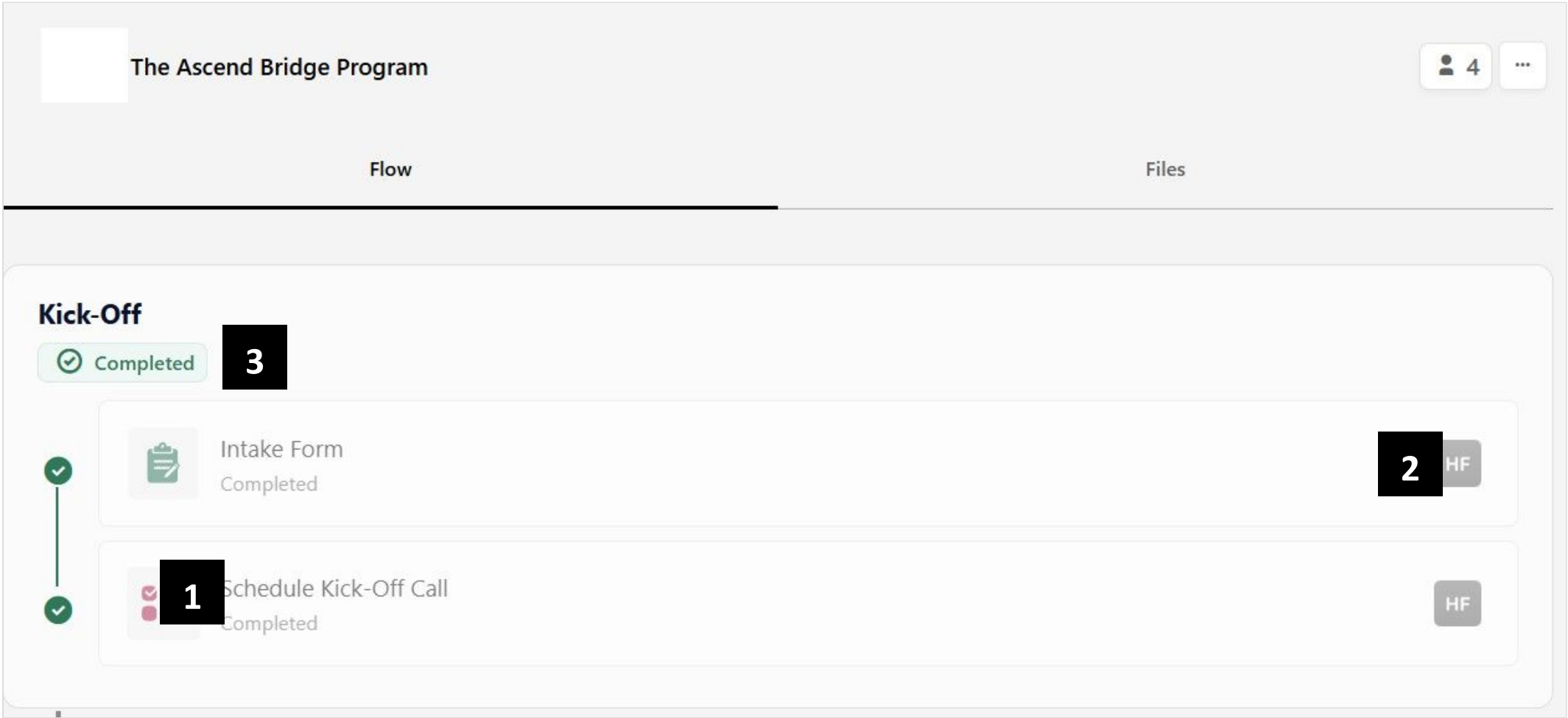
Completed

HF

BUDGET	\$1,200,000
IMPACT	About 180 students in the cohort at any time
GOALS	Coaching · Emergency micro-grants · Employer placement · Maintain our strong persistence rate (84%!)

The Kick-Off Call

- 1 Schedule a Kick-Off Call with the Hudson Ferris team.
- 2 This is a 30-minute call to review your Intake and address any questions.
- 3 Once completed, the Request stage opens.



Ask Margaret

The form takes in your need and details. Then the team gets to work.

H

F

What would you like to ask Margaret?

Who is asking this question? (Name)

Enter your answer here

Who is asking this question? (Title)

Enter your answer here

What topic does your question fall under? *

☒ Individual Giving

☐ Institutional Giving (e.g., foundations, grants)

☐ Events (e.g., planning, execution, follow-up)

☐ Special Giving Initiatives (e.g., campaigns, legacy gifts)

☐ Board Relations & Engagement

☐ Development Operations

☐ Fundraising Leadership and Management

☐ Marketing & Communications

☐ None of the above. I have a different question.

Individual Giving Questions *

☐ I have a prospect in mind, can you help me determine if they are a good fit?

☒ I have a meeting with a funder/prospect. Can you provide specific guidance?

☐ How do I identify potential major donors within our existing network?

☐ What are some strategies for stewarding current donors to encourage recurring gifts?

☐ What's the best way to re-engage lapsed donors?

☐ What should I include in a donor thank-you letter to maximize impact?

☐ What are the best practices for making an effective fundraising ask?

☐ I have a different question.

Thank you for your question!

To provide the best possible support, please answer the following questions. Feel free to leave blank if you don't have an answer.

Please provide full name of the donor/prospect and any other information you have on them.

Enter your answer here

How was this meeting arranged?

Enter your answer here

If this is a current donor, please share the giving history.

Enter your answer here

Do you have a goal in mind for this meeting?

Enter your answer here

Add Files (If Needed)

A yes/no question that lets you attach donor lists, collateral, or plans for the team to review with your request.

Action Details (Step 4)

Do you need to submit any files with your request?

Decision

1

✓ No

PROGRESS

Completed

NO

Neon One Demo

Skipped

2

Decision assigned to Neon One Demo.
Aug 17, 8:46 AM

■ You made a decision: No.
Aug 17, 8:46 AM

■ You marked this Decision as completed.
Aug 17, 8:46 AM

3

Write a comment...

Responses

Every response opens with your question, word for word, and the topic you chose — so you and your team know exactly what is being answered.

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Question (Individual Giving → I have a different question): We have about 2,400 people on our email list from petition drives, but only around 340 have ever given. We got a surge of about \$14,000 in three weeks when the data center proposal went public in March, and it has been quiet since. We are all volunteer and nobody on our board has fundraised before. How do we turn an email list of people who are angry about this project into people who actually fund the work?

Each response ends with itemized next steps

The reasoning comes first. Then every response closes with numbered next steps — specific, dated where possible, and yours to act on.

Recommended next steps

1. Merge the Google Sheet, the PayPal export, and the check stubs into one list this month.
2. Contact every March donor within three weeks with a report on the permit fight and no ask.
3. Launch a named monthly program at a \$10 to \$25 entry point with a first-year goal of 120 members.
4. Build a proximity list of property owners in the affected radius and mark who on the board knows each one.
5. Open the renewal conversation on the June grant now.

We sign every response

A named Hudson Ferris consultant writes and signs each answer — and offers next steps if you want to keep working on it together on the topic.

If it would help, we could set up a Margaret Coaching Call on the sustainer launch and the March donor reactivation. We can draft the conversion letter together and script the first few neighbor conversations so your board has words to use. Please suggest some dates and times in the chat.

Warmly,

Ed Leibman

Founding Partner

Hudson Ferris

YOUR NEON SUBSCRIBER ADVANTAGE

24hrs.

Response time on requests
(twice as fast as the
standard turnaround)

PUT IT TO WORK

Keep a running list of questions so you can submit a new request the moment an answer comes back and keep the pipeline moving.

MONTH TO MONTH

Unlimited requests, answered by real fundraising consultants, with no scoped hours and no long-term contract.

WHAT YOU GET

Included in every subscription

- Unlimited requests, answered by Hudson Ferris fundraising consultants
- Guidance and document review of appeals, proposals, invitations, and more
- A complimentary hour-long coaching call every month
- Prospect, grant, board, campaign, and communications guidance
- Insights from DonorAtlas, Impala, Apollo.io and other premium tools, analyzed against your specific fundraising needs
- Help with complex problems, like departmental structure, board relations, or campaign strategy

Start with guidance. Add deeper support only when you need it.

OPTIONAL ADD-ONS

Deliverables,
generated as needed

When your team needs a concrete piece of work rather than guidance, the Hudson Ferris team completes it on your behalf.

Submit these through the A La Carte Services Workflow, keeping guidance questions in your Standard Workflow.

SERVICE	PRICE
Prospect list — individuals	\$150
Prospect list — institutional	\$200
Website, social, or donor-journey audit	\$200
Grant proposal writing	\$350
Solicitation training	\$350

...and so much more

Your first week, step by step

Step 01 Join your workspace You receive an email from “Hudson Ferris via Moxo.” Click Join Workspace and set your login credentials.	Step 02 Explore your two workflows Standard Workflow for fundraising guidance requests. A La Carte Services for paid deliverables.	Step 03 Complete your intake form It lives inside your portal. Filling it out is what triggers scheduling for your Kick-Off Call.	Step 04 Attend Your Kick-Off Call A short session to give the Margaret team context. It officially opens your workflow to requests.
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Tip: Book your first monthly coaching call before the Kick-Off session ends. That way, nothing waits on scheduling.

Suggested first requests

PROSPECTING & PIPELINE “We do not know who to focus on first.” Margaret helps you identify priority prospects, set next steps, and build a more disciplined pipeline.	GRANT OPPORTUNITY “We found a funder, but the deadline is close.” Margaret helps you assess the opportunity, frame the request, and strengthen the proposal language.
DONOR FOLLOW-UP “What should happen after a gift or an event?” Margaret reviews your donor journey, identifies the gaps, and recommends stronger stewardship practices.	BOARD FUNDRAISING “Our board wants to help fundraise but does not know how.” Margaret helps structure board fundraising activity and prepares members for donor conversations.

WHAT IT COSTS

50% of your monthly CRM fee,
capped at \$200

A monthly cap

Margaret follows Neon’s CRM banded pricing. Subscriptions over \$400 per month cap Margaret at \$200 per month.

Billing that matches yours

Monthly or annual, aligned to your existing Neon CRM billing frequency and co-termed with that subscription.

No seats to manage

No per-user licenses, no permissions to administer; your entire team gets visibility.

FOR COMPARISON

A traditional consulting retainer runs \$2,500-\$30,000+ per month on scoped hours and scheduled check-ins. Margaret is the same caliber of consulting, month to month, with unlimited requests.

BEFORE WE OPEN IT UP...

Questions we hear most

Is Margaret an AI/chatbot?

No. Margaret is the Hudson Ferris team- all trained fundraising consultants. Answers come from real people using verified data.

How many people can use it?

Your whole team, with one superuser submitting requests.

Does Margaret replace our CRM?

No. Neon CRM organizes your fundraising information. Margaret helps your team act on it.

Are we locked into a contract?

Margaret is month to month, co-termed with your Neon CRM subscription. There are no scoped hours to spend down.

THANK YOU

Ready to ask Margaret?

Please reach out to your account representative for more information!

Hudson Ferris Inc. · 167 Madison Avenue, 602, New York, NY
10016 info@hudsonferris.com · +1 646 783 9139

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