

Training & Masterclasses



OPTIMISE EXPERIENCE
MAXIMISE IMPACT

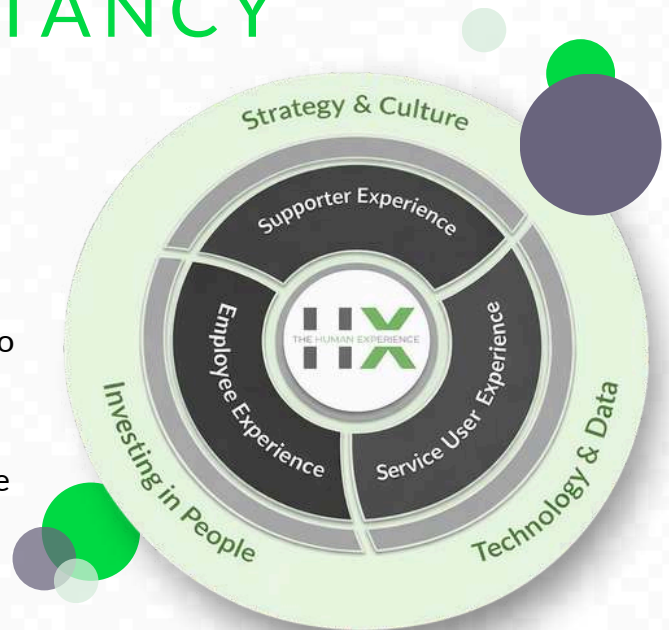


WELCOME TO

THE HX CONSULTANCY

HUMAN-CENTERED THINKING
DATA-DRIVEN DECISIONS
MEANINGFUL IMPACT

At The HX Consultancy, we work alongside purpose-driven organisations to turn insight into action. Through practical training and masterclasses, we help equip individuals and teams with the knowledge, tools and confidence to create stronger organisations and brighter futures.



*At **The HX Consultancy** we are passionate about building organisational capacity for social impact*

WHAT YOU CAN EXPECT

PRACTICAL LEARNING

Tools and real world examples you can use straight away

FRESH PERSPECTIVES

New ideas to challenge, inspire and spark change.

ACTIONABLE IMPACT

Support to turn learning into meaningful, lasting results

TAILORED SOLUTIONS

Training designed around your goals, challenges and journey stage

THE HX MASTERCLASSES

PRACTICAL LEARNING FOR
A BIGGER IMPACT.

Our sessions bring practical insight, fresh thinking and real-world experience to the challenges facing today's fundraising and nonprofit leaders. Whether you're developing your skills, tackling a specific challenge or looking at what comes next, each master-class is designed to help turn ideas into action.



OUR SESSIONS ARE FOR YOU IF...

You're an organisational leader or fundraising professional who wants to explore fresh perspective, build knowledge and develop your skills. Our masterclasses are also a critical opportunity to connect with like minded peers to establish a network for future exchange and learning

Our masterclasses are designed for people at different stages of their journey, from those building their foundations to experienced leaders looking to challenge their thinking.



WHAT DOES YOUR ORGANISATION NEED RIGHT NOW?

Wherever you are, we are here for you with tailored support. Every organisation is on a different journey. You might be strengthening your strategy, developing your people, getting to grips with your data, reviewing your technology or looking to improve supporter experience.

Start with the challenge: Our masterclasses offer practical learning and fresh perspectives to help you understand what's happening, explore what's possible and take the next step.



Non-profit Boards

Income Generation

Are you a trustee of a nonprofit organisation? Are you or your peers on the board new to the nonprofit sector? Or perhaps you would like to better understand how you can empower professional fundraising?

This is a leadership-level exploration of your organisation's current and future funding model, spanning fundraising and other relevant methods of income generation. Bringing years of nonprofit board experience, this masterclass will explore how your trustees will drive successful income generation for your organisation. Although rooted in governance, this session focuses on financial resilience and independence.

Together we will explore strategy and culture, planning and programme maturity, investment and capacity building. The session is designed to empower boards to recognise and dismantle barriers to effective income generation by providing informed top-down strategic support to the executive and fundraising teams.

The content will be tailored to support organisations at different levels of maturity in their fundraising programme based on a thorough understanding of your strategic and operational objectives. The skillset of the board will also inform the session, with an emphasis on leveraging sector-transferable skills pragmatically and appropriately.

AT A GLANCE



DURATION
3 hours



FORMAT
In-person /
online



AUDIENCE
Non-Profit, Boards and
Leadership

SESSION OUTLINE

- Sector Context – Board governance, culture and transferable skills
- Strategy and Planning – Strategic multi-year planning and investment
- Relationships – Delegation, challenge and oversight
- Funding Models – Is your funding model serving you? Risk vs resilience
- Programme Maturity - Plotting your course to develop your fundraising mix
- Capacity Building – Investment strategies, teams, skills and culture
- Metrics - Defining and planning success, KPIs and reporting frameworks

LEARNING OUTCOMES

- Understanding of transferable skills across sectors and overcoming jargon
- Appreciation of cultural and resourcing nuances of nonprofit sector and governance
- Explore lines between roles of boards, subcommittees and executive teams
- Deep dive of funding models, income streams and implications for programmes
- Understand evolution of fundraising cycles and establishing different income streams



INTERESTED IN THIS MASTERCLASS?

THESE SESSIONS ARE HELD REGULARLY THROUGHOUT THE YEAR WITH REGISTRATIONS VIA OUR SITE. OR EMAIL JANE@THE-HX.ORG IF YOU WOULD LIKE US TO DEVELOP A BESPOKE SESSION FOR YOUR BOARD AND/OR LEADERSHIP TEAM



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PEOPLE | INSIGHT | ACTION

Supporter Insight Brilliant Basics

Want to get to know your supporters better? This practical session is the place to start laying the foundation for an insights-driven approach.

Supporter insight is information that helps an organisation to learn about their supporters. For instance, how they feel about you, their preferred ways to interact, their favourite ways of supporting you and why they do so. Understanding their behaviours and attitudes will help you to deepen trust and your relationship over time, ensuring they feel valued while you work together to grow your organisation's impact.

In a world of rising acquisition costs, you can't afford not to maximise lifetime value – how can you drive loyalty if you don't know who you're talking to? The aim of this practical session is to demystify what lies beneath really knowing your supporter, making insight accessible to all charitable organisations.

This masterclass can be delivered as a one-hour introductory webinar, or developed into a 1 to 3 hour in-person session. In consultation with you, bespoke content will be tailored based on the scale and maturity of your organisation's insights programme and designed to engage your priority audiences, from leadership to operational team.

AT A GLANCE



DURATION
3 hours



FORMAT
In-person /
online



AUDIENCE
Fundraising and Non-
Profit Teams

SESSION OUTLINE

- Supporter Insight – what is that anyway and why is it important?
- Market research – intro to qualitative and quantitative approaches
- Donor behaviour and attitudes – what do we already know?
- KPIs and Reporting – some basic concepts to get you started
- Actionable outcomes – what next?

LEARNING OUTCOMES

- Understand the core tenets of supporter insight and its value
- Gained an introductory understanding of market research methodologies
- Understand the principles of performance reporting frameworks
- Grasp definitions behind your most important KPIs
- Start exploring putting insights into practice



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PEOPLE | INSIGHT | ACTION

Supporter Experience Masterclass

The What, Why, Who and How!

In today's environment, delivering meaningful supporter experiences is critical to driving income, loyalty, and impact - yet it can be challenging for nonprofits to embed this effectively across strategy, culture, and operations. This 3 hour in-person masterclass for middle management and leadership level is centred on elevating understanding of supporter experience strategy beyond a limited focus on donor care.

Together participants will arrive at a cross-functional understanding of what supporter experience truly means and how to embed this in the culture and values of your organisation. Grounded in core CX disciplines such as personas, journey mapping, measurement, and strategy, the course places a strong emphasis on data and technology as key enablers, alongside the practical challenges of implementation - from business casing and governance to adoption across teams.

Sign up if your charity wants to reap the benefits of a cross-functionally engaged senior leadership team on how to rally around the supporter. This content is relevant across all income streams, albeit execution of the principles may vary. The focus is on pragmatic applications of customer experience best practice in resource-strapped and potentially siloed environments.

AT A GLANCE



DURATION
2.5 hours



FORMAT
In-person /
online



AUDIENCE
Middlemanagement and
Leadership

SESSION OUTLINE

- What - The HX Framework, defining experience and journeys
- Why: Aligned strategy and planning for affinity, LTV and ROI
- Who: Dismantling silos for holistic supporter - centric culture
- How: Foundations, enablers and tools for success

LEARNING OUTCOMES

- Strategic Context - Fundraising evolution and revolution
- Data Driven Fundraising - Core principles and benefits
- Affinity Meets Efficiency - Win Win of supporter experience
- Single Supporter View - An achievable utopia?
- The role of AI - Adoption vs caution
- Destination Inspiration - A success story and next step



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PEOPLE | INSIGHT | ACTION

Turning data into donations

Introduction to data-driven fundraising

Digital acceleration. Automated journeys. Artificial Intelligence... all the buzz words! But what does it mean to have a fundraising programme that is data driven, and why should I care?

This session will be most valued by organisations establishing the foundations of their individual giving programme, or looking to scale to a level that requires more automation of repeatable processes. It will bring you through the core principles of data's role in effective fundraising, demystify some of the jargon and introduce practically useful frameworks and concepts.

AT A GLANCE



DURATION
1 hours



FORMAT
In-person /
online



AUDIENCE
Data curious
fundraisers at all levels

SESSION OUTLINE

- Strategic Context - Fundraising evolution and revolution
- Data-Driven Fundraising - Core principles and benefits
- Affinity Meets Efficiency - Win-win of supporter experience
- Single Supporter View - An achievable utopia?
- The role of AI - Adoption vs caution
- Destination Inspiration - A success story and next steps

LEARNING OUTCOMES

- Understand the imperative of a data-driven approach to fundraising
- Linking back to core fundraising programme objectives and KPIs
- Guidance on preparing the business case for data investment
- Understand the role of data in relation to supporter experience
- Case studies of best practice in action
- Perspective on the role of predictive and generative AI in fundraising



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Mastering your Data Journey

Ok, so the world is on fire. Your data is a mess. AI is intent on world domination. And we're all worried we can't keep up. Are we going to stick our heads in the sand, freeze on the spot, or run in frantic circles? Or will we tackle the challenge head on - through a fresh lens.

In a digital era, your data is your donor - so show it some love! This three-hour masterclass session relevant for fundraisers at a leadership and operational level - in fact, bringing these two cohorts together is where the magic happens!

Together we can map where your organisation is on its data journey and name practical ways to nurture data culture and strategy. We will explore different types of data skills and how you can build capacity through assembling a virtual team - both in-house and through outsourcing partners, and the roles of each. Last but not least, we will outline key approaches to your data roadmap, governance and business case.

A deeper version of this session is also available, where we work with you to develop a series of sessions that are specifically designed to engage the relevant audiences in your organisation - from board level to frontline employees.

AT A GLANCE



DURATION
3 hours



FORMAT
In-person /
online



AUDIENCE
Leadership and
Operational Levels

SESSION OUTLINE

- Making the most of your data - a journey, not a destination
- Data strategy - the bridge between organisational goals and platforms
- Data literacy and culture - championing the data cause
- Different types of 'data' at your fingertips
- Capacity building - skills, LandD and outsourcing your virtual data team
- Building your data and platform roadmap
- Business casing and future-proofing your data

LEARNING OUTCOMES

- Demystification of data in all its forms and its application
- Fresh expectation and understanding of embarking/ continuing the data journey
- Dismantling the skills required at different stages and how to tackle
- Tips and tricks to drive leadership buy-in and support your business case
- Practical tools to initiate and drive change in your organisation
- Pragmatic steps to leverage data and insights that won't cost the earth
- Bringing data back to the donor - the bridge between IT and Fundraising



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PEOPLE | INSIGHT | ACTION

CRM Best Practice & Pitfalls

The opportunity of a fully leveraged CRM platform is huge - from business intelligence that guides your decisions, to automations that will maximise your income and impact. So how do you achieve an implementation that doesn't just address operational requirements, but is aligned with your organisation's strategic priorities?

This session explores different levels of data maturity and CRM adoption, helping you understand where you are and how to progress. It outlines the best practice and pitfalls involved from CRM selection to implementation and development - against the backdrop of your broader tech stack.

Whether you are on the lookout for a new CRM platform, or figuring out how to better leverage your existing one, you won't regret signing up to this session to make the most of that investment.

AT A GLANCE



DURATION
3 hours



FORMAT
In-person /
online



AUDIENCE
Charities keen to better
leverage their CRM

SESSION OUTLINE

- Which CRM should we get? Is that really the right question?
- Preparing for CRM migration - don't replicate the same mistakes
- Building your data foundation
- Mapping your business processes
- Best practice for CRM adoption and implementation
- Common pitfalls and how to avoid
- The past, present and future

LEARNING OUTCOMES

- Practical CRM implementation and development project tips, tricks and pitfalls
- An overview of requirements definition in the context of your wider tech stack
- How to move your organisation along curves of CRM adoption and data maturity
- A view of data through the lens of CRM business intelligence and reporting
- Insight into the opportunities of automation and integration to enhance impact



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PEOPLE | INSIGHT | ACTION

THE HX WORKING WITH YOU

Let's make
a bigger impact.

Practical learning. Fresh thinking. Real-world change.

We work with nonprofit organisations' fundraising teams and leaders to build knowledge, strengthen capability and create the conditions for greater impact.



PUBLIC SESSIONS

Our masterclasses and training sessions are held regularly throughout the year, with registrations available via our website. A great way to build your skills, connect with peers and gain fresh perspectives.



BESPOKE TRAINING

We can tailor any of our masterclasses to your organisation, team or board. Whether you need a focused session, a deeper dive or a bespoke programme, we will work with you to design a session that meets your specific goals and challenges.



MORE ON THE WAY

We are continuously developing new masterclasses and training sessions on the topics that matter most to the sector. If there's a subject you'd like to see, or a specific challenge you're facing, we'd love to hear from you.

WHAT PEOPLE SAY

“The HX Consultancy's unique blend of human-centred design, data strategy, and holistic thinking has been instrumental in helping us develop and refine key initiatives. Their expertise in leadership development, supporter experience, and CRM and data strategy has ensured that our programmes deliver real impact.”

NON-PROFIT DIRECTOR

REAL FEEDBACK. REAL IMPACT.

“The clear outputs from the workshop means that the insights will drive action rather than being a 'nice to know'. I highly recommend The HX Consultancy, not just for incredible knowledge but also for the way in which Jane delivers and presents. Her passion for this area of work is evident.”

FUNDRAISING MANAGER



PEOPLE
INSIGHT
ACTION



Optimise Experience Maximise Impact

Practical learning. Fresh thinking.
Real-world change.



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