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**MAKING EVERY CONTACT COUNT USING THE GIVING SCORE™ IN THE RAISER’S EDGE®**
PRESENTER BIOS

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AGENDA

- Review Giving Score Fundamentals.
- Discuss types of actions that are appropriate for each Giving Score group.
- Discuss best practices for maintaining constituent contact.
- Create an action in our Giving Score query of VIPs.
- Highlight the benefits of using action tracks.
THE GIVING SCORE DEFINED - BASED ON LIKELIHOOD AND CAPACITY

Helps you raise more money by:

• Giving you the power to **target and identify your best supporters.**
• **Saving you time and money** by allowing you to focus your efforts.
• **Improve efficiency** by allowing greater constituent management in The Raiser’s Edge.
• **Segmenting** your constituents into four unique groups based on their likelihood and capacity to give a gift.

THE GIVING SCORE DEFINED

• Blackbaud looks at hundreds of external demographic and financial characteristics and combines that data with historical giving information from your organization to score your database.

• Scores will be returned on individuals who have a complete US address.

• Corporations and foundations will not receive a score, but you can add a rating to their record.

• Soft credits are not included in the scoring process.
PROSPECT MANAGEMENT

Major Gift Fundraising & Prospect Management: Helps prioritize prospects who have the capacity and who are most likely to give.

- **FAN** Acquire and Upgrade
- **VIP** Cultivate and Steward
- **Acquaintance** Minimize and Monitor
- **LongShot** Qualify and Inspire

CAPACITY TO GIVE

LIKELIHOOD TO GIVE

A prospect management process helps constituents to continually move through the major gift pipeline – a steady stream of donations.

- Helps manage your donor prospect pool effectively.
- Maintains a balanced prospect portfolio.
- Ties research and actions to advancement goals and objectives.
- Promotes building lifelong relationships with key donors.
**PROSPECT MANAGEMENT**

Major Giving Efforts are designed to:

- Promote significant giving.
- Promote loyal giving.
- Reach one donor at a time.
- Develop a personal relationship.
- If desired by the donor, to publicly recognize their special commitment.

**Identification** stage consists largely of prospect research activities.

- Prospect research segments donor prospects by likelihood & capacity.
- Uncover characteristics that predict and describe donor behavior.
- Build major gift pipeline.
- Assign a solicitor to each potential donor.
- Complete the identification stage in short order.
PROSPECT MANAGEMENT

**Qualification** stage further screens prospects to determine which prospects will be the most likely donors.

- Turn data collection into fundraising intelligence.
- Begin relationship-building process.
- Confirm prospects' likelihood and capacity.
- Provide feedback to prospect research team.
- Document findings for future use.
- Develop strategy for moving prospect to next stage.

**Cultivation** stage strengthens natural ties that exist between your organization and the prospect.

- Make the prospect feel connected to your organization.
- Align prospect interests, needs, and desires with organizational mission.
- Enhance the prospect’s understanding and affiliation with your mission.
- Promote involvement and get buy-in to the “shared” vision of the gift.
PROSPECT MANAGEMENT

- **Solicitation** is the outcome of a well-executed moves management program.
  - It is all about the R’s.
    - Right purpose.
    - Right amount.
    - Right solicitor.
    - Right timing.

PROSPECT MANAGEMENT

**Stewardship** ensures that the relationship with the prospect continues to grow.

- You can’t say “Thank you” enough.
- Stewardship should happen throughout the cycle.
- Make sure the established relationship remains positive.
- Report back results of gift.
- Keep the donor engaged in the life of the organization.
- Remember, Life Time Value (LTV) is key.
Major Giving Metrics for Evaluation:

- The level of activity and success are the best indicators of the value of major gift officers.
- Activity may be assessed in terms of visits, solicitations, qualifications, and active movement of all portfolio prospects.
- Success is assessed in terms of movement within a portfolio.
  - As suspects are qualified and moved down the pipeline to closing of a major gift.
  - All prospects should be moved forward within 90-120 days (3-6 months) of receipt into the portfolio.

- Initial qualification of suspect pool may take about 90-120 days.
  - A clear move forward should occur every 3 months for each prospect.
- Once the qualified prospect pool is determined, active cultivation, and solicitation are the next steps.
  - Number of qualified prospects in a portfolio may range from 30-50.
  - The entire portfolio (including those being qualified) may range from 100-125 to 150-200.
Major Giving Metrics for Evaluation – Reasonable goals include:

• A minimum of 12 visits per month for assessment and/or cultivation (130 annually). (This factors in vacation, holidays, etc.)
• Add five new prospects to the portfolio through officer discovery and identification.
• Remove unqualified prospects each month through assessment.
• Contact reports should be filed within 5 business days of the contact. The 15th of the month is the deadline for the previous month’s contact reports.

• 20 - 30 moves per month.
• 12 -18 face-to-face visits per month.
• Portfolio size: 150 - 200 prospects.
  – Identification – 25%
  – Cultivation – 50%
  – Solicitation – 25%
• Portfolio size influenced by:
  – Ask amount.
  – Geography.
  – Job responsibilities.
MOVES MANAGEMENT

Moves Management is the process of moving a prospect through the development cycle.

- **Move**: A strategic and substantial personalized interaction with a prospect which directly and tangibly advances that prospect towards an ask or a close.

- **Actions** are used to record these moves:
  - Phone Calls.
  - Emails.
  - Visits and Meetings.
  - Mailings.

- **Action Tracks**: A series of actions assigned to constituent, event, or appeal record.

- **Action Tracks as part of Moves Management**:
  - Streamline cultivation of new donors.
  - Keep up with current donors.
  - Consistent fundraising approach for common segments.
  - Manage communication.
  - Eliminate manpower of creating individual actions.
MOVES MANAGEMENT FOR VIPS

- Qualification, Cultivation, Solicitation, and Stewardship
- Meetings, Mailings, Phone calls, and Emails.
  - Solicitation Plan – filed in proposal notes in The Raiser’s Edge; this should include a description of the purpose of the gift, the dollar amount (“Expected Ask”), and an approximate deadline for making the ask (“Ask Date”).
  - The solicitation plan may be modified or edited as needed going forward with explanatory information entered in “Notes” on the Solicitation Plan.

FANS

- Stewardship – Volunteer Management
  - Meetings.
  - Mailings.
  - Phone calls.
  - Emails.
LONGSHOTS

- Qualification and Long-Term Cultivation
  - Meetings.
  - Mailings.
  - Phone calls.
  - Emails.

ACQUAINTANCES

- Minimize Investment
  - No meaningful Moves for this group.
  - Actions would not be needed.
PROSPECT AND MOVES MANAGEMENT

Integrated Fundraising Plan

Qualification

Stewardship

Moves and Actions

Identification

Cultivation

AGENDA

☑ Review Giving Score Fundamentals.
☑ Discuss types of actions that are appropriate for each Giving Score group.
☑ Discuss best practices for maintaining constituent contact.
  • Create an action in our Giving Score query of VIPs.
  • Briefly describe an Action Track.
CREATE AN ACTION FROM A GIVING SCORE QUERY

- Create or open a Giving Score query
- Select the constituent for the action
- Click **New Action**
- Enter action information
- Save and close the action
- Update action record as needed

OPEN A GIVING SCORE QUERY

1. On the navigation bar, click **Query**.
2. Select the Giving Score query.
3. Click **Open**.
SELECT THE CONSTITUENT FOR THE ACTION

1. In the constituent list, select the constituent for the action.

2. In the Recent Action area, click New Action.

CREATE ACTION RECORD

1. On the New Action window, enter the action details.

2. After the action details are entered, click Save and Close.

3. For more information about creating actions, search Training Central for the keyword “Actions”.
CREATE AN ACTION FROM A GIVING SCORE QUERY

1. Create or open a Giving Score query
2. Select the constituent for the action
3. Click New Action

Enter action information
Save and close the action
Update action record as needed

SELECT THE ACTION TO UPDATE

1. In the constituent list, select the constituent for the action.
2. In the Recent Action area, select the action to update.
3. Click Open.
UPDATE THE ACTION

To update the action:
1. Select the **Action completed on** checkbox.
2. Enter the completed date.
3. Record quick updates on the **Attributes** tab.
4. Record action details on the **Notes** tab.
5. Create another action record for any follow up activities.

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ACTION TRACK EXAMPLE

Send a brochure

Follow-up phone call

Interest?

No

Follow up in 3 months

Yes

Send event invitation

For more information about action tracks, attend the Building Relationships with Action Tracks virtual instructor-led training.

SUMMARY

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MORE WAYS TO LEARN!

- Adding an Action in a Giving Score Query in The Raiser’s Edge
- Adding an Action to a Constituent Record in The Raiser’s Edge
- Assigning an Action Track to a Constituent in The Raiser’s Edge

Search Training Central using keyword “7.92” to find all of your 7.92 training.

GET THE MOST OUT OF 7.92 WITH LEARN

Attend these online instructor-led classes to learn more about Giving Score queries and actions:

- Introduction to Query in The Raiser’s Edge (Free with Learn)
- Working with Giving Score Queries (Free with Learn More)
- Tracking Actions (Free with Learn)
- Building Relationships with Action Tracks (Free with Learn More)

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Join us for our next webinar:

**Increase Your Gift Potential with Effective Proposals**

December 12\textsuperscript{th} at 2 PM Eastern

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