



# MANAGING YOUR PORTFOLIO FOR GREATER FUNDRAISING SUCCESS

August 15, 2017 :: 1:00 - 2:00 p.m. EDT

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*Are you effectively prioritizing the donors in your portfolio?*  
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## OVERVIEW

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Join us to learn key strategies and tips on how to better prioritize your time and donors so that you can be more successful in your communication and fundraising efforts. During this webcast, you will gain strategies and insights into:

- Developing a regular portfolio maintenance schedule and routine
- Incorporating portfolio assessments to keep you on track
- Leveraging metrics to meet and exceed your goals
- Prioritization strategies for prospects and donors

## WHO SHOULD ATTEND

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This training is designed to benefit anyone who manages a portfolio, including major and planned gift officers, or those in talent management or advancement services looking to better support frontline fundraisers.

[VISIT EVENT PAGE](#)

[www.academicimpressions.com/webcast/managing-your-portfolio-greater-fundraising-success](http://www.academicimpressions.com/webcast/managing-your-portfolio-greater-fundraising-success)



## LEARNING OUTCOME

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After participating in this online training, you will be able to implement a time-saving routine and prioritization strategy that will help improve your cultivation and solicitation efforts.

## CONTACT US FOR MORE INFORMATION

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Contact David Boggs, Associate Program Manager [David.Boggs@academicimpressions.com](mailto:David.Boggs@academicimpressions.com) or 720-988-1215 if you'd like additional information about the program.

## AGENDA

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Tuesday, August 15, 2017 :: 1:00 - 2:00 p.m. EDT

### ➔ **Portfolio Maintenance**

- Establishing your routine
- Adding assessments and metric strategies to your routine

### ➔ **Prioritizing prospects and donors**

- Moving a donor up
- Pushing a prospect back
- Knowing when to drop someone from your portfolio

## INSTRUCTOR

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### **Chris Pagel, Director, Institutional Partnerships, Chapman University**

Christopher Pagel serves as the Director of Institutional Support at Chapman University. His team's purpose is to strategically prospect manage and address the major gift funding priorities for the university as identified by the senior leadership as well as the priorities for each school/college as identified by its dean.

Christopher graduated from Chapman University's Argyros School of Business and Economics with his bachelors in business administration as well as an MBA in 2006. During that time, worked for ten years with Walt Disney Company before moving into development in both private high school and college levels.



 PLEASE FAX ALL REGISTRATION PAGES TO: 303.221.2259

## PRICING & REGISTRATION (CIRCLE ONE)

BEST VALUE	LIVE WEBCAST	WEBCAST RECORDING	WITH AI PRO MEMBERSHIP
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### EARLY BIRD PRICING

Postmarked on or before August 8, 2017. After August 8, 2017, an additional \$75.00 fee for the first connection and \$50.00 fee for each additional connection applies.

[REGISTER ONLINE](#) or below.

### PAYMENT METHOD:

We accept Visa, MasterCard, and American Express credit cards. To pay by check, include the check with this form or select the "invoice me" option. Fax form to 303.221.2259 or mail form along with payment to: Academic Impressions, 4601 DTC Blvd., Ste. 800, Denver, CO 80237.

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