



TRANSITIONING LEADERSHIP ANNUAL DONORS TO MAJOR DONORS

Tuesday, October 18, 2017 :: 1:00 - 2:30 p.m. EDT

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Learn how to more effectively move donors through your pipeline.
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OVERVIEW

Shrinking donor pipelines are a perennial concern for advancement shops. Even with a large group of annual leadership donors, successfully transitioning these donors to major gift prospects is an extended process that requires careful planning.

Learn portfolio management and stewardship techniques to successfully transition leadership donors into major gift prospects. Our expert instructor will share insights on:

- Evaluating and managing your leadership annual donor portfolio
- Identifying the leadership donors on which to focus
- Managing productive donor visits
- Stewardship techniques to effectively transition donors

[VISIT EVENT PAGE](#)

www.academicimpressions.com/webcast/transitioning-leadership-annual-donors-major-donors-october-2017



BETTER STEWARD AND TRANSITION DONORS WITH THESE ADDITIONAL RESOURCES

Included in your registration is a packet of resources containing:

- Conversation guide for productive meetings with donors
- Stewardship plan
- Impact reports for leadership annual and major donors
- Survey for leadership annual donors

WHO SHOULD ATTEND

Leadership or major gift officers will learn how to successfully transition donors to major gift prospects.

LEARNING OUTCOME

After participating in this online training, you will be able to develop plans to better transition leadership donors to major gift prospects.

CONTACT US FOR MORE INFORMATION

Contact Gwen Doyle, Program Manager at gwen@academicimpressions.com or 720-988-1258 if you'd like additional information about the program.



AGENDA

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- ➔ **Evaluating and Managing your Leadership Donor Portfolio**
 - Moving donors into, and upgrading within, your leadership giving levels
 - Effectively assessing and managing your leadership donor portfolio
 - Developing goals and strategies for leadership donors
 - » Continuous leadership giving
 - » Upgrading for higher level annual giving
 - » Upgrading from leadership annual gift to major gift
 - Beyond qualification: Identifying who manages the relationship
- ➔ **Managing Productive Donor Visits**
 - Determining visit expectations and goals
 - Using probing questions to build to a successful solicitation
- ➔ **Stewardship Techniques to Effectively Manage and Transition Leadership Donors**
 - Engaging donors in continuous conversation
 - Developing a unique stewardship program for leadership donors
 - Tools to gather vital information to strategically build your relationship

INSTRUCTOR

Brian Daugherty, Senior Vice President & Chief Philanthropy Officer, San Diego Humane Society

With more than twenty years of experience in development with a focus on annual giving and major gifts, Brian has worked for a variety of organizations in the nonprofit arena, including the Baltimore Symphony Orchestra, the Maryland Zoo in Baltimore, the University of Baltimore, the University of California, San Diego San Diego State University and the University of San Diego. His experience includes extensive work on telemarketing campaigns, direct mail, board management, volunteer solicitations, e-philanthropy, and personal solicitations. Brian has used his extensive experience in statistical data analysis and strategic planning to be an integral team member of capital campaigns ranging in scope from \$16 million to \$1 billion. A contributor to Currents magazine, he has been a frequent presenter for the Council for Advancement and Support of Education (CASE) and the Annual Giving Professionals Network (AGPN).



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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\$525	\$350	\$350	FREE

EARLY BIRD PRICING

Postmarked on or before October 11, 2017. After October 11, 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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Billing Zip Code/Postal Code _____ Exp. Date _____ Security Code (last 3 digits on the back of Visa and MC or 4 digits on front of AmEx) _____

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My check is included and covers _____ registration(s) Check # _____