LEARNING OUTCOME

After participating…

…able to identify and implement the latest technologies in your fundraising or alumni relations work.

ACADEMIC IMPRESSIONS 2

AGENDA

- Leveraging the Latest Digital Tools for:
  - Event management
  - Prospecting and qualifying donors
  - Donor visits
  - Travel management
- Optimizing Event and Visit Follow-Up
- Data Security Considerations

ACADEMIC IMPRESSIONS 3

POLL

Are you issued smartphones and tablets with your work?

ACADEMIC IMPRESSIONS 4

#AItraining

LEVERAGING APPS

ACADEMIC IMPRESSIONS 5

EVERYDAY MANAGEMENT: EVERNOTE

ACADEMIC IMPRESSIONS 6

EVERYDAY MANAGEMENT

EVERNOTE FEATURES:

- Notebook
- Tasklist
- Contacts
- Travel
- Images
- Websites
- Maps

ACADEMIC IMPRESSIONS 7

RESOURCE

Evernote

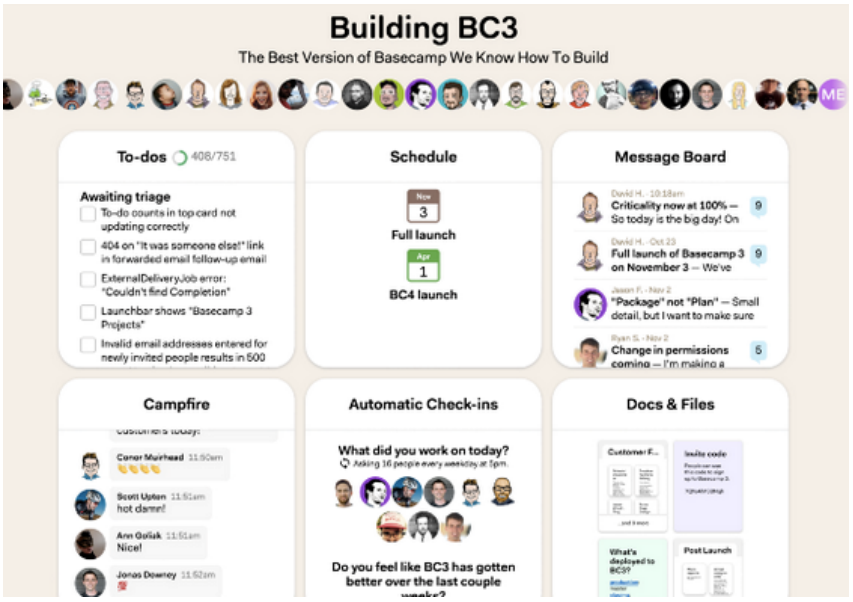
https://evernote.com/

ACADEMIC IMPRESSIONS 8

EVERYDAY MANAGEMENT: BASECAMP

PROJECT MANAGEMENT: BASECAMP

Manage your team project



ACADEMIC IMPRESSIONS 11

RESOURCE

Basecamp

https://basecamp.com/

ACADEMIC IMPRESSIONS 12

CALENDAR MANAGEMENT: SUNRISE

The best integrated calendar out there!

ACADEMIC IMPRESSIONS 13

RESOURCE

Sunrise

https://calendar.sunrise.am/

ACADEMIC IMPRESSIONS 14

CALENDAR MANAGEMENT: TIMEFUL

Helps manage short focused bursts of time in order to create habits

ACADEMIC IMPRESSIONS 15

RESOURCE

Timeful

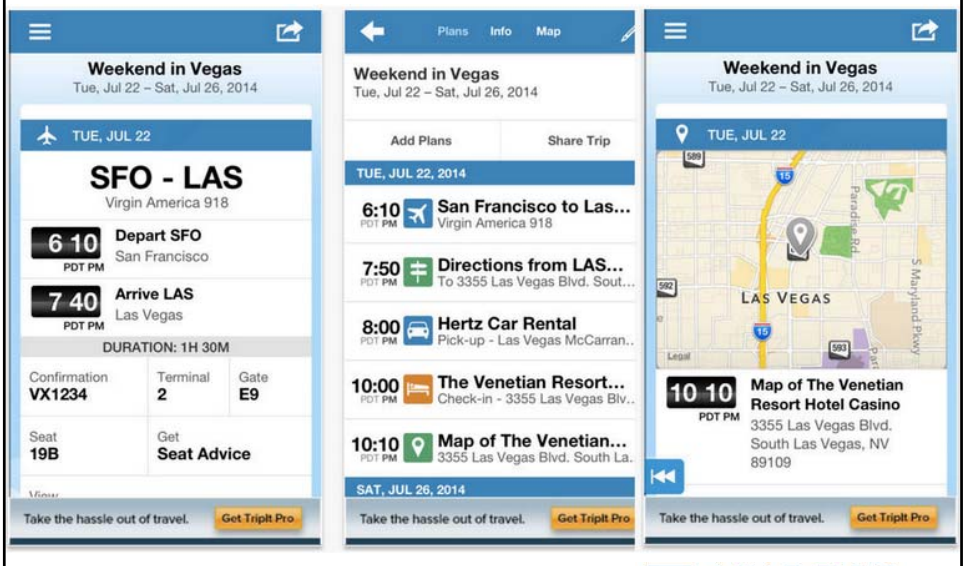
http://www.timeful.com/

ACADEMIC IMPRESSIONS 16

TRAVEL MANAGEMENT: TRIPIT

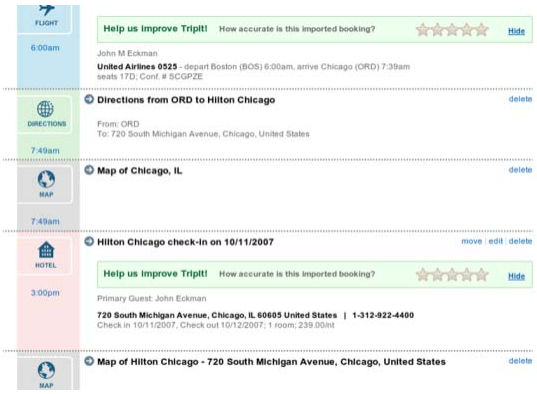
Syncs flight, hotel, reservation and other entertainment confirmations

ACADEMIC IMPRESSIONS 17



ACADEMIC IMPRESSIONS 18

TRAVEL MANAGEMENT: EVERTRUE



Travel management features also available in EverTrue

ACADEMIC IMPRESSIONS 19

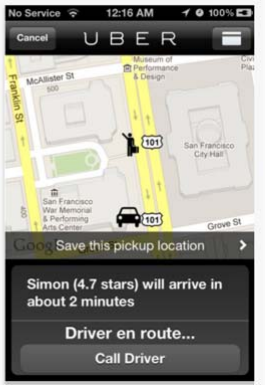
RESOURCE

Tripit

https://www.tripit.com/

ACADEMIC IMPRESSIONS 20

TRAVEL MANAGEMENT: UBER



Ugh! Its raining won't be able to find a cab

ACADEMIC IMPRESSIONS 21

RESOURCE

Uber

https://www.uber.com/

ACADEMIC IMPRESSIONS 22

TRAVEL MANAGEMENT: WAZE

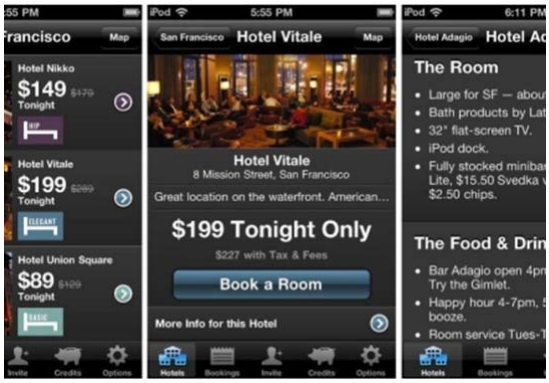
Map out first visit and check traffic

RESOURCE

Waze

https://www.waze.com/

TRAVEL MANAGEMENT: HOTEL TONIGHT



Storm turns ugly, flight cancelled, need a room

ACADEMIC IMPRESSIONS 25

RESOURCE

Hotel Tonight

https://www.hoteltonight.com/

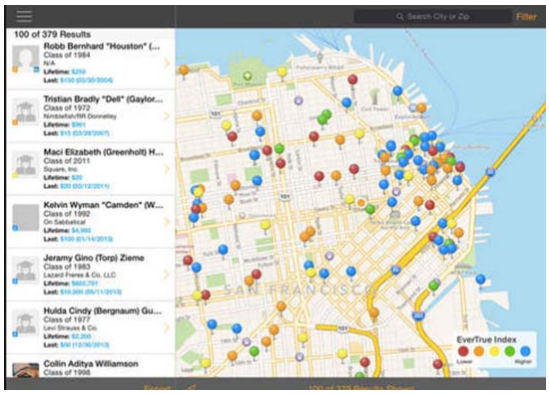
ACADEMIC IMPRESSIONS 26

CHAT

What other apps or tools have you found helpful to assist with travel management?

ACADEMIC IMPRESSIONS 27

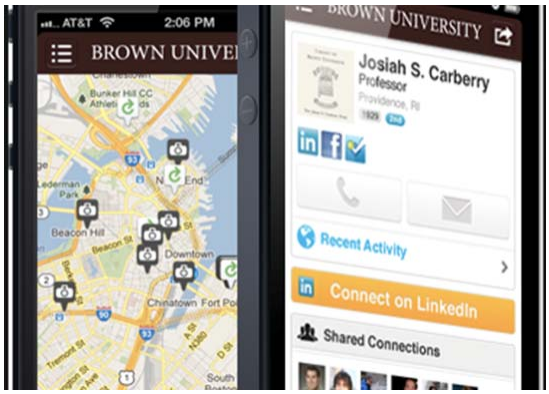
PROSPECT IDENTIFICATION: EVERTRUE



Connects internal donor data and external social data to increase fundraisers' field efficiency

ACADEMIC IMPRESSIONS 28

PROSPECT IDENTIFICATION: EVERTRUE



Connects internal donor data and external social data to increase fundraisers' field efficiency

ACADEMIC IMPRESSIONS 29

PROSPECT IDENTIFICATION: EVERTRUE

Also an Alumni and Research Resource

ACADEMIC IMPRESSIONS 30

RESOURCE

EverTrue

http://www.evertrue.com/

PROSPECT IDENTIFICATION: FULLCONTACT

FullContact

Capture donor's business associates info

PROSPECT IDENTIFICATION: FULLCONTACT

Similar feature in EverTrue

RESOURCE

FullContact

https://www.fullcontact.com/

UPDATE ALUMNI INFO: SHORTFORM

Make obtaining updated alumni information easier

ACADEMIC IMPRESSIONS 35

RESOURCE

ShortForm

From Mobile Phone: http://alumni.uncc.edu

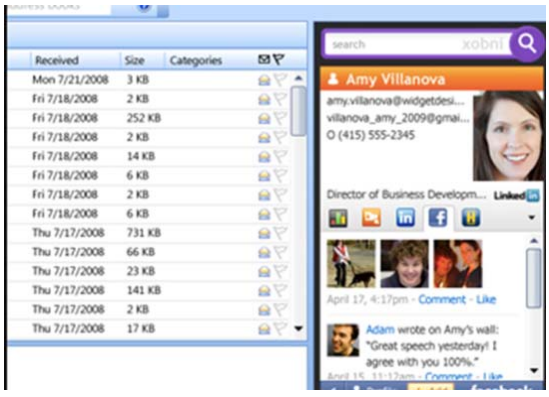
ACADEMIC IMPRESSIONS 36

PROSPECT MANAGEMENT: XOBNI

Integrates your email with social data

ACADEMIC IMPRESSIONS 37

PROSPECT MANAGEMENT: XOBNI



- Integrates your email with social data

ACADEMIC IMPRESSIONS 38

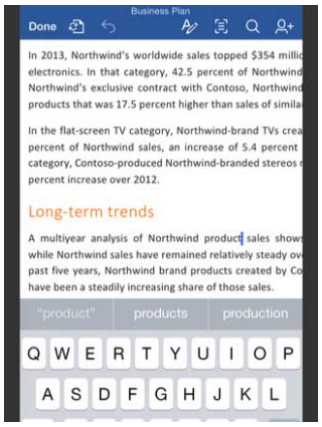
RESOURCE

Xobni

http://address.yahoo.com/xobni

QUESTIONS

PROPOSAL MANAGEMENT: APPS FOR OFFICE



- Microsoft Office APPS

ACADEMIC IMPRESSIONS 41

RESOURCE

Apps for Office

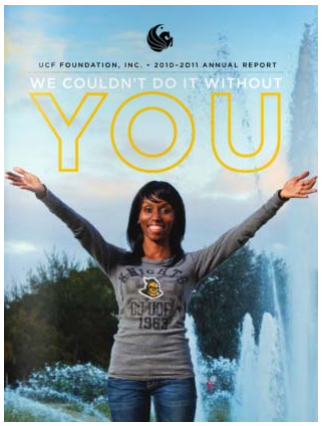
https://store.office.com

ACADEMIC IMPRESSIONS 42

PROPOSAL MANAGEMENT: ISSUU

Make your proposal amazing

PROPOSAL MANAGEMENT: ISSUU



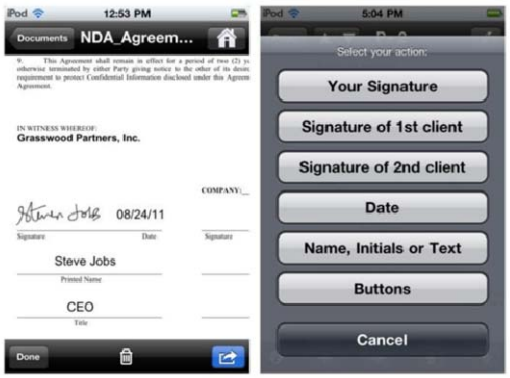
Make your proposal amazing

RESOURCE

Issuu

http://issuu.com/

CLOSE A GIFT: SIGNEASY



Sign documents on any mobile device

ACADEMIC IMPRESSIONS 47

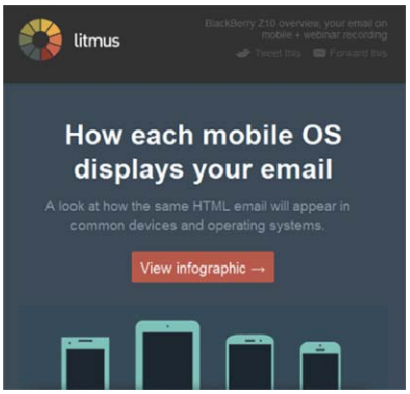
RESOURCE

SignEasy

http://getsigneasy.com/

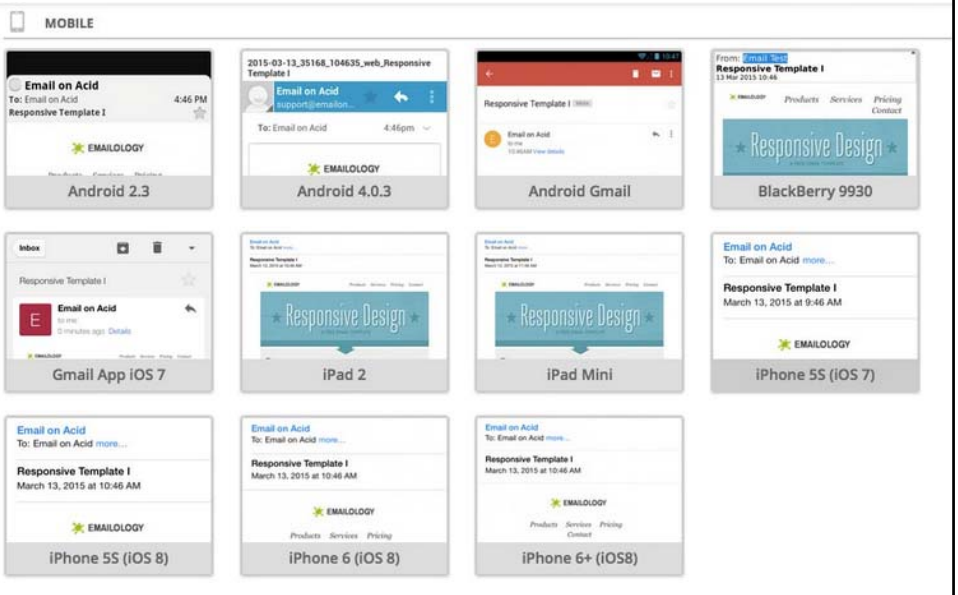
ACADEMIC IMPRESSIONS 48

EMAIL TESTING: LITMUS TEST



See what your email will look like

ACADEMIC IMPRESSIONS 49



ACADEMIC IMPRESSIONS 50

RESOURCE

Litmus Test

https://litmus.com/

VIDEOS: ANIMOTO

Make a quick custom video

VIDEOS: ANIMOTO

Make a quick custom video

RESOURCE

Animoto

https://animoto.com/

EVENT MARKETING: HOOTSUITE

Build buzz on twitter for tonight's event

ACADEMIC IMPRESSIONS 55

EVENT MARKETING: HOOTSUITE

Build buzz on twitter for tonight's event

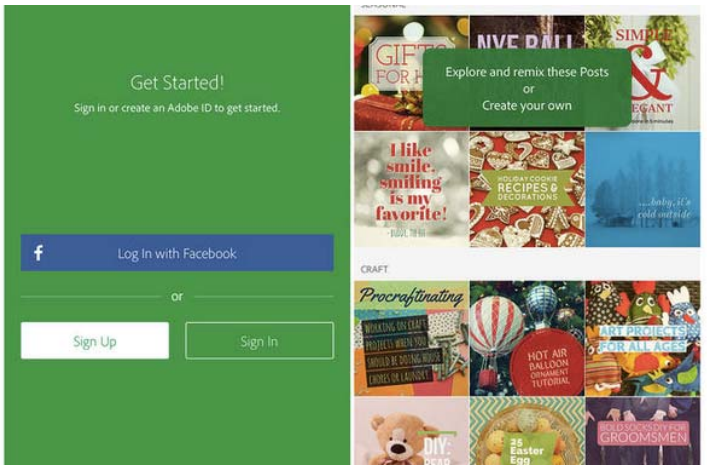
ACADEMIC IMPRESSIONS 56

RESOURCE

Hootsuite

https://hootsuite.com/

SOCIAL CONTENT CREATOR: ADOBE POST



- **EASY SIMPLE GRAPHICS**

59

- **FUN ANIMATED VIDEO AND PRESENTATIONS**

60

CREATE A SENSATION: THUNDERCLAP

EVENT MANAGEMENT: MAGIC PLAN

Map your event space

ACADEMIC IMPRESSIONS 62

EVENT MANAGEMENT: MAGIC PLAN

Map your event space

RESOURCE

MagicPlan

http://www.floorplanner.com/magicplan

EVENT MANAGEMENT: CHECKINEASY

Check in guests at your event

ACADEMIC IMPRESSIONS 65

EVENT MANAGEMENT: CHECKINEASY

Send an alert to your VP that a certain guest has arrived

ACADEMIC IMPRESSIONS 66

EVENT MANAGEMENT: CHECKINEASY

Add a Guest on the fly at any time!

Add an unexpected guest and capture their data

ACADEMIC IMPRESSIONS 67

EVENT MANAGEMENT: CHECKINEASY

Print nametags for multi day events so that the attendee can be scanned in.

ACADEMIC IMPRESSIONS 68

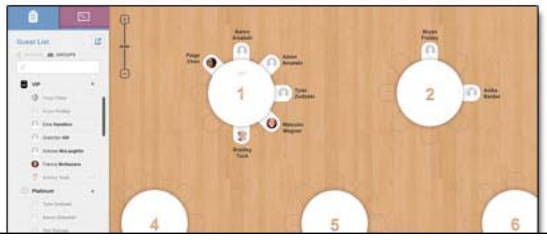
RESOURCE

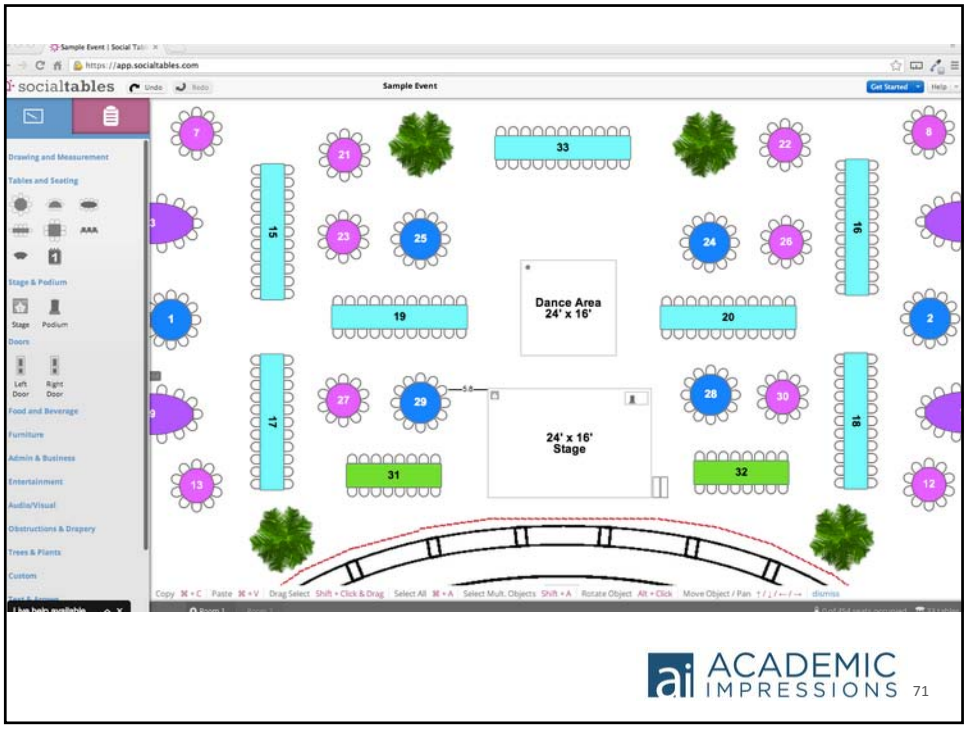
CheckInEasy

http://www.checkineasy.com/

EVENT SEATING: SOCIALTABLES

socialtables

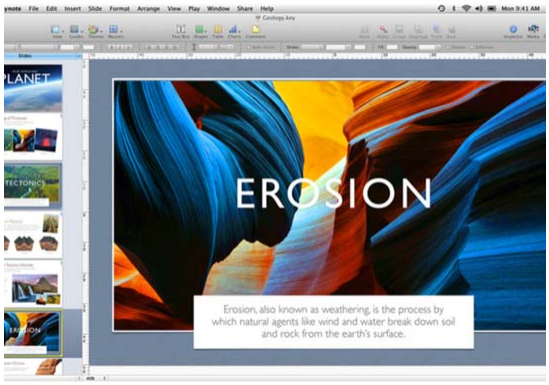




ACADEMIC IMPRESSIONS 71

ACADEMIC IMPRESSIONS 72

EVENT MANAGEMENT: KEYNOTE



Show slideshow at event and control with your phone

EVENT MANAGEMENT: KEYNOTE

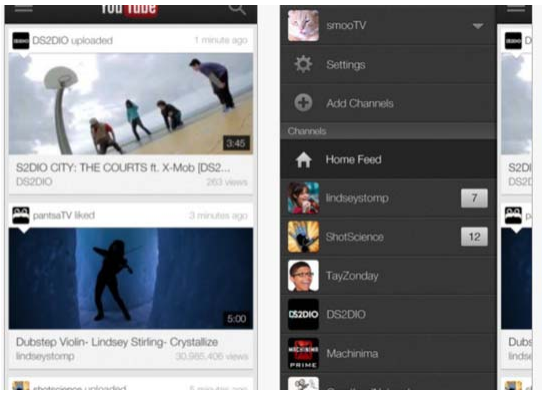
Show slideshow at event and control with your phone

RESOURCE

Keynote

https://www.keynote.com/

EVENT MANAGEMENT: YOUTUBE



Live stream your event for free

ACADEMIC IMPRESSIONS 77

CHAT

How have you creatively leveraged YouTube to engage donors?

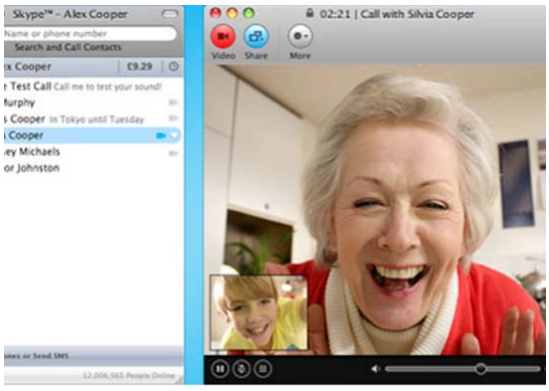
ACADEMIC IMPRESSIONS 78

RESOURCE

YouTube

https://www.youtube.com/

EVENT MANAGEMENT: SKYPE



Have students join your event from campus

RESOURCE

Skype

http://www.skype.com/en/

QUESTIONS

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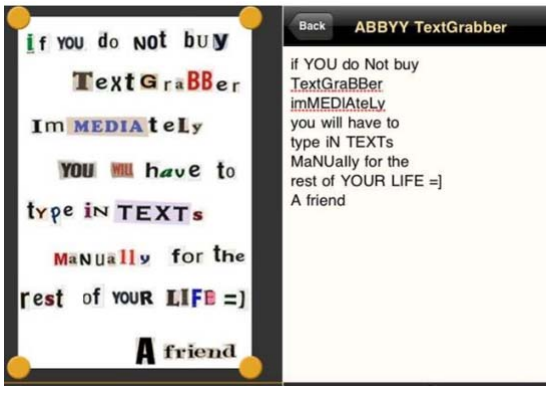
OPTIMIZING EVENT & VISIT FOLLOW-UP WITH APPS

CONTACT REPORT MANAGEMENT: TEXTGRABBER



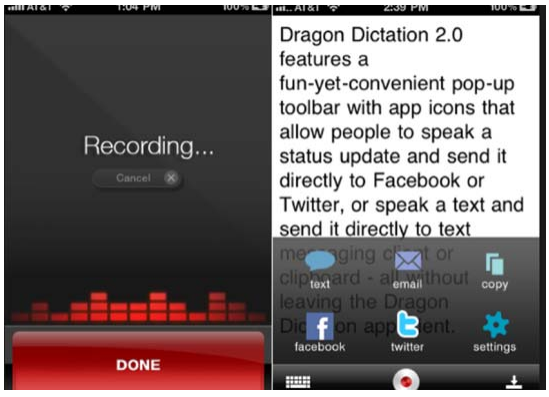
Enter contact report into your database

RESOURCE

TextGrabber

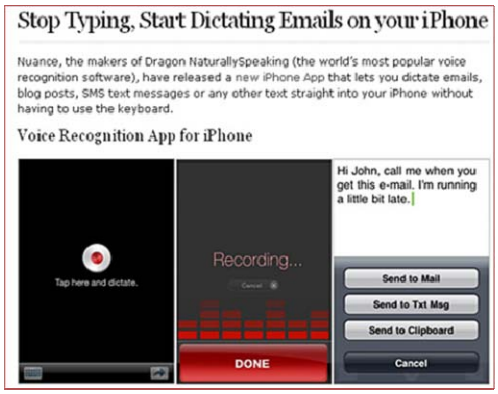
http://www.abbyy.com/textgrabber/

CONTACT REPORT MANAGEMENT: DRAGON DICTATION



Enter contact report into your database

CONTACT REPORT MANAGEMENT: DRAGON DICTATION



Enter contact report into your database

RESOURCE

Dragon Dictation

http://www.nuancemobilelife.com/apps/

THANK YOU MANAGEMENT: THANKYOUPRO

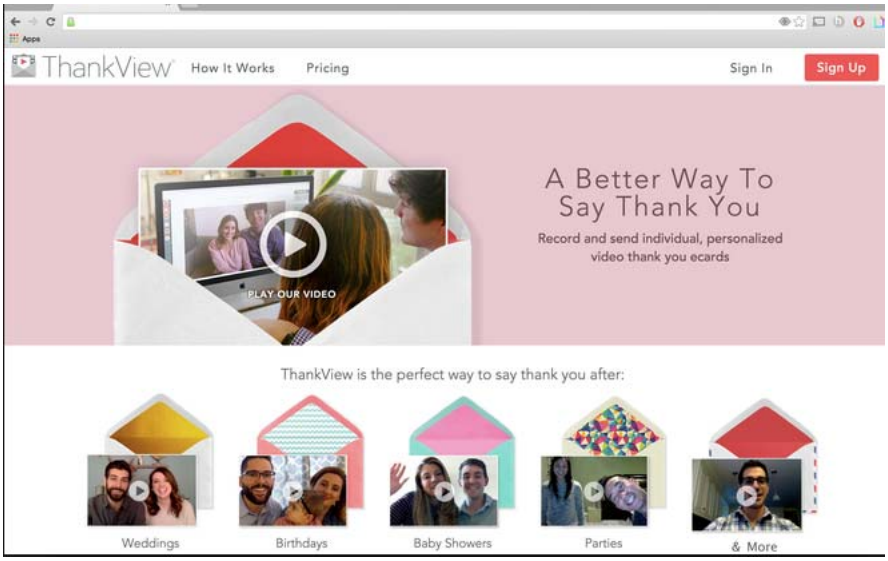
- Send handwritten thank you to today's visits

RESOURCE

ThankYouPro

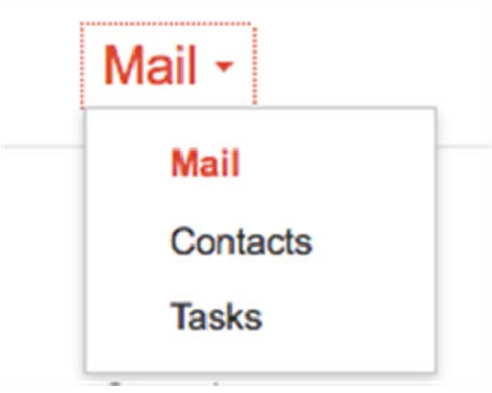
http://www.thankyoupro.com/

THANK VIEW



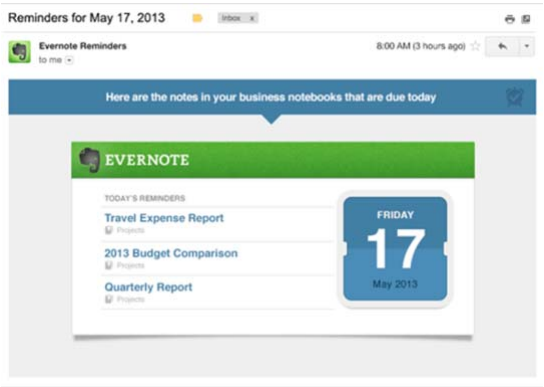
MISCELLANEOUS EVENT FOLLOW-UP: EVERNOTE

Set follow up tasks



ACADEMIC IMPRESSIONS 92

MISCELLANEOUS EVENT FOLLOW-UP: EVERNOTE



Set follow up tasks

ACADEMIC IMPRESSIONS 93

RESOURCE

Evernote

https://evernote.com/

ACADEMIC IMPRESSIONS 94

TRAVEL FOLLOW-UP: EXPENSIFY

Submit expense reports

RESOURCE

Expsensify

https://www.expensify.com/

CHAT

What other digital tools have you found invaluable in your work as a fundraiser?

ACADEMIC IMPRESSIONS 97

#AItraining

DATA SECURITY CONSIDERATIONS

ACADEMIC IMPRESSIONS 98

DATA SECURITY

- Servers
- Remote identities
- Coordination with database
- Working with IT team
- Training

QUESTIONS

EVALUATION

Thank you!

Please remember to complete the event evaluation. Your comments will help us continually improve the quality of our programs.

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