




LEARNING OUTCOME


After participating...

...you will be able to implement a time-saving routine and prioritization strategy that will help improve your cultivation and solicitation efforts.


AGENDA

- Portfolio maintenance
 - Building your portfolio
 - Establish your routine
 - Adding assessments to your routine
- Prioritizing prospects and donors
 - Moving a donor up
 - Pushing a prospect back
 - Knowing when to drop someone from your portfolio

 **ACADEMIC**
IMPRESSIONS 3

 **POLL**

Do you have an established routine for managing your portfolio?

 **ACADEMIC**
IMPRESSIONS 4

#Altraining

PORTFOLIO MAINTENANCE



■ Building your portfolio



Define who you are looking for

- Relationship
- Capacity
- Past giving
- Corporate/Foundation contacts
- Area of engagement



■ Building your portfolio



- Individualized strategies
 - Make time for this
 - Personalization
- Decide who manages the relationship
 - Consider relationship, language, culture, etc.

ai ACADEMIC IMPRESSIONS 7

■ Building your portfolio




Begin meetings and cultivation

- Consider the first impression
- Think long term
- Have multiple avenues of engagement ready (strategy)

ai ACADEMIC IMPRESSIONS 8

■ Establish your routine

- Sorting your portfolio
 - Funding priority
 - Level in gift cycle
- Weekly routine
- Daily tasks
- Contact reports
- Organizing system - example




■ Filing System Example

Pros	Cons
Easy to add find prospects	Discipline to dedicate time to develop new strategies
Helpful with metrics of how many people you are managing	Paper usage


ALPHA SYSTEM

- Sort prospects who are new to your portfolio or still need a strategy
- Set a goal to review a certain number per week
- Set time in your calendar for prospecting

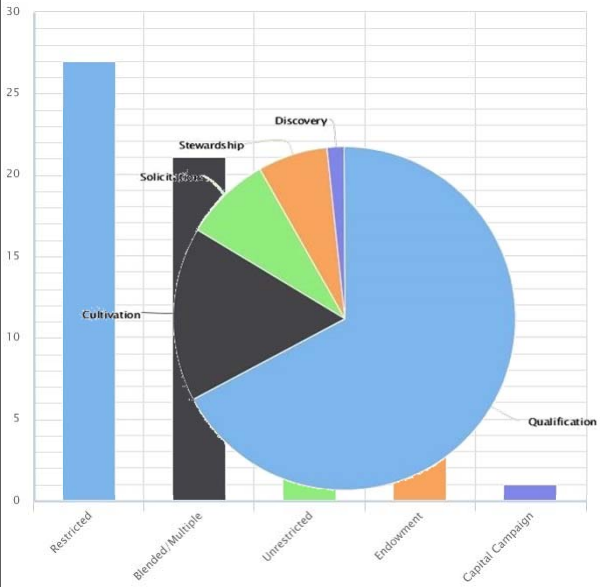


Filing System Example

Pros	Cons	WEEKLY SYSTEM
Great to hold one accountable to number of contact per week	Depending on the number of prospects, this may be too big to manage	<ul style="list-style-type: none"> Once a strategy is developed, put prospect in a rotation of contact and follow-up to see good cultivation leading to solicitation and a closed gift 6 to 8 weeks
Keeps good donor relations and ensures followup	Paper usage	



Adding assessments to your routine




Metrics:

- Personal visits
- Dollars raised
- Number of solicitations
- Contact reports
- Unique households contacted



? QUESTIONS

ai ACADEMIC IMPRESSIONS 13



#Altraining

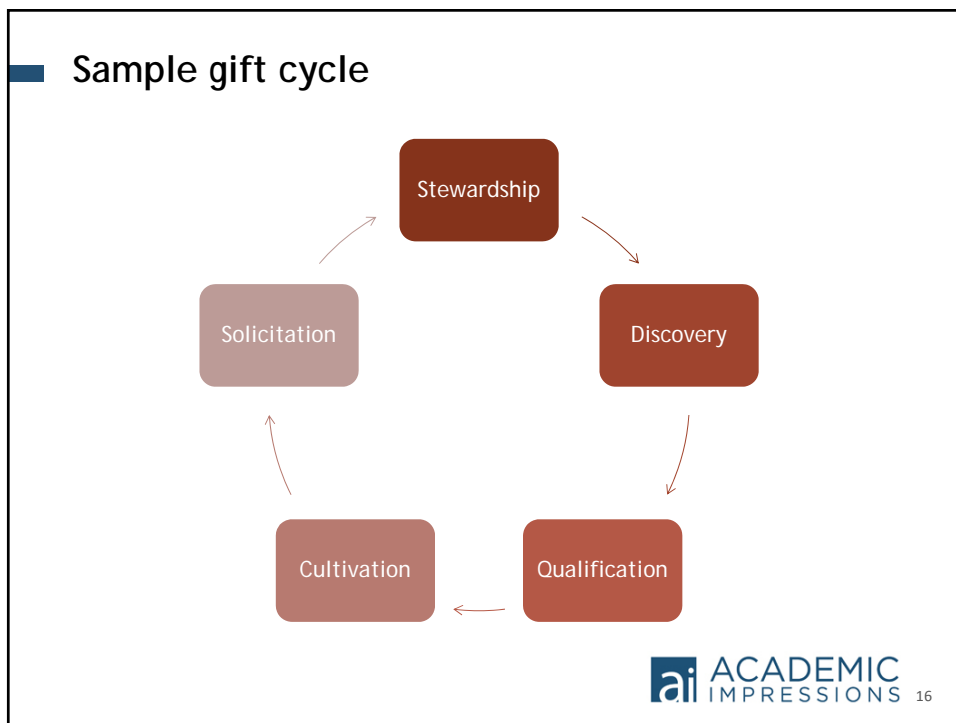
PRIORITIZING PROSPECTS AND DONORS

ai ACADEMIC IMPRESSIONS 14

 POLL

How many prospects on average do you have in your portfolio at any given time?





■ Moving a donor up

When to move a donor up

- Significant cultivation
- New program to engage with
- Potential board membership



■ Moving a donor up

Other factors

- Capacity change (positive)
- Strategy with other donors
- Keep up to date with news!



■ Actual example



ai ACADEMIC IMPRESSIONS 19

■ Pushing a prospect back



- “Strategy adjustment”
- New engagement
- New relationship manager
- Don’t be afraid to ask the prospect
- Find the right fit
- Timelines are good, but you can’t rush it


ai ACADEMIC IMPRESSIONS 20

■ Actual example



ai ACADEMIC IMPRESSIONS 21

■ Knowing when to drop someone from your portfolio




- Should this be done?
- How?
 - Strategy
 - Find a fit
 - Warm introduction

ai ACADEMIC IMPRESSIONS 22

■ Actual example



ai ACADEMIC IMPRESSIONS 23

 TAKEAWAYS

Have a strategic routine!

If we are organized and develop effective strategies as fundraisers, we will see great results in fulfilling our goals and funding priorities; but more important, if we do this well, it will lead to engaged relationships for our institution that will last a lifetime and beyond.

ai ACADEMIC IMPRESSIONS 24



RESOURCE

Fundraising Strategy Shortcuts

WealthEngine workbook excerpt:

http://info.wealthengine.com/rs/wealthengine/images/individual_gifts_shortcuts_print.pdf



QUESTIONS





EVALUATION

Thank you!

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

© Copyright 2017 Academic Impressions

Follow us:



27