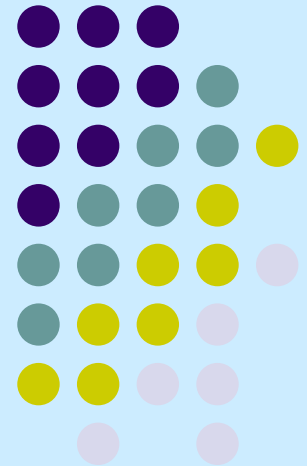


# Prospect Management. . .It's Not Just for Tracking Anymore

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Michel Hudson, CFRE  
APRA – Southwest  
April 2, 2004

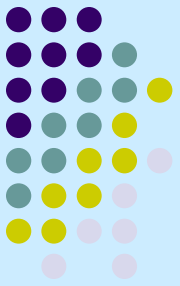


# Agenda

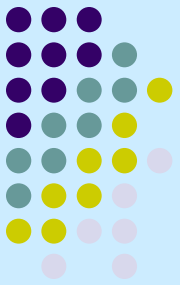


- Setting the Stage
- Role in Fund Raising
- Prospect/Moves Management
- Prospect/Donor Tracking
- Other Considerations
- Q&A

# Setting the Stage



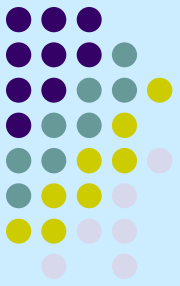
- Solicitation Stages
  - Pipeline
  - Timeline
  - Cycle
- System Objectives
- Moves Management vs. Tracking



# Role in Fund Raising

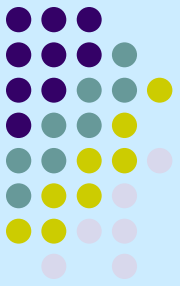
- Large Shop vs. Small Shop
- Centralized vs. Decentralized
- 66% of APRA Survey Responses
- Role of Research Office
- Feasibility Study

# Prospect/Moves Management: Elements of Systems



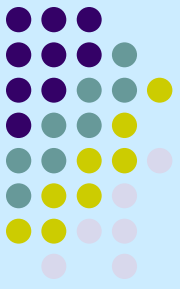
- Strategy Summary
  - Overall Approach
  - Plan of Action
- Connection to Organization
- Assignments
- Levels or Stages
- Ratings
- Project or Campaign

# Prospect/Moves Management: Types of Systems



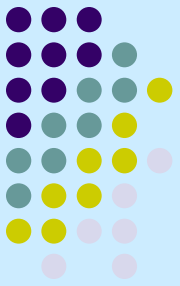
- Manual or Hardcopy
- PC-based
- Integrated (Mainframe/Network)
- Canned vs. Custom
- Bottom Line

# Prospect/Moves Management: Reports



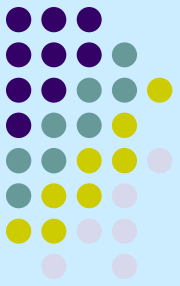
- Connection to Organization
- Assignments
- Ratings
- Levels or Stages
- Project or Campaign
  - Solicitation Schedules
  - Gift Charts
- Next Steps/Previous Contacts (Tracking)
- Staff Management

# Prospect/Moves Management: Meetings

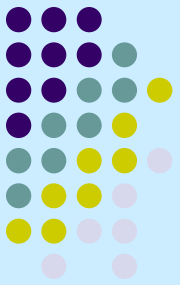


- Assignments/Clearances
- Staff Updates
- Strategy Sessions
- New Prospects
- Rating and Screening Sessions
- Timing
- Responsibility/Authority

# Prospect/Donor Tracking: Elements of Systems



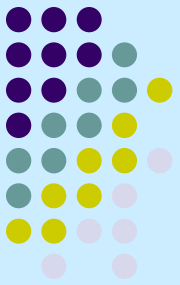
- Call Reports
- Correspondence
- Research Findings
  - Life Events
  - Business Changes
  - Wealth
- Giving History
- Lost Constituents



# Other Considerations

- Forms
- Policies & Procedures
- Responsibility/Authority
  - Accountability
  - Performance/Evaluation
- Politics, Culture and Style
- Overkill
- Other Resources

# Q&A



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