PROSPECT MANAGEMENT TRAINING

UNIVERSITY OF CINCINNATI FOUNDATION
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PROSPECT MANAGEMENT
The prospect management functionality within Blackbaud CRM allows us to track current and potential supporters to UCF. Upon completion of this course, you will be able to do the following:

- Understand how prospect management information is stored in CRM.
- Recognize how prospects are assigned.
- Add and edit a prospect plan.
- Add an opportunity record.
- File a contact report.
- Submit a research request.
- Navigate a constituent’s Wealth and Ratings page.
- Utilize the Major Giving Management console.
- Print a prospect profile.

PROSPECT INFORMATION ON A CONSTITUENT RECORD
All constituents that are considered a prospect will need to be given a constituency code of PROSPECT. Constituency codes are added on to a record on the Personal Info Tab/Constituencies. Once a PROSPECT constituency exists, the constituent record will have a PROSPECT tab that maintains all information relating to the prospect activities. (Thus, any constituent that does NOT have a PROSPECT tab has not been given the required PROSPECT constituent code.)

The following sub-tabs are available on a prospect record and will be further defined below: Prospect Summary, Plans, Prospect Team, Planned Gifts, Funding Interests, Campaigns, Prospect Manager History, and Completed Research Requests. These tabs can be manipulated based on the user preference to appear in order as desired.

Prospect Summary
This sub-tab provides an overview of the prospect status, prospect manager and start date.

Prospect Status:
From this screen you can change the status of a prospect. The current Prospect Status levels are as follows:
- Not a Prospect Ever
- Not a Prospect Now
- Qualified Prospect

Plans
This tab displays the plan(s) assigned to the prospect. All prospects with an assigned prospect manager should have an active prospect plan.
Prospect Team
This tab contains the team members assigned to this prospect. In CRM the following is a brief description of the roles you will see throughout the Prospect Management Program:

- **PROSPECT MANAGER**
  This is the staff member assigned overall to monitor and manage a prospect.

- **PRIMARY MANAGER** (Primary Plan Manager)
  This is the staff member responsible for the Prospect Plan.

- **SECONDARY SOLICITOR**
  This is a secondary staff member or constituent who will be helping to close the gift.

- **PARTICIPANT**
  An individual who will participate in the solicitation or interaction leading to a contribution.

Planned Gifts
This section displays planned gifts associated with the constituent.

Funding Interests
This section displays the organizations, affiliations, activities, or pursuits a prospect has expressed interest in.

Campaigns
UCF is not utilizing the Campaign functionality at this time.

Prospect Manager History
This tab displays a list of previous prospect managers along with the dates they served as a prospect manager.

Completed Research Request
This shows a history of prospect research completed on this constituent.
MY FUNDRAISER DASHBOARD

The **My Fundraiser** dashboard displays individual Development Officer pipeline information. From this landing page, Development Officers can view a summary of their prospects, create prospect plans and opportunities, as well as monitor any progress related to their pipeline. For Development Officers, the vast majority of their activity within CRM will take place from the **My Fundraiser** page.

PROSPECT AND PLANS

A prospect plan tracks the prospect’s plan activity, including step detail, ask opportunities, fundraisers associated with the prospect plan, and any planned gifts. On the Prospects and Plans tab, the top section of the tab tracks all prospect plans for which the Development Officer is connected. An exclamation point in a yellow triangle appears on plans with a last completed step older than 90 days and next to overdue steps. The bottom half of the tab, **Prospect Assignments**, tracks all prospects to which the Development Officer is connected.

TO ADD A PROSPECT PLAN

1. From the My Fundraiser dashboard, click on the name of the prospect, which will take you to the constituent record. On the constituent record, click the **Prospect** tab.

2. On the **Plans** sub-tab, click **ADD Major Giving Plan**. *(Stewardship Plans will be part of Phase 2).*

3. Complete the fields and options on the Details tab:
   - In the Plan name field, **enter a name** to identify the plan. This is a free text field that identifies the specific plan. The naming convention is YEAR-UNIT (for example 2015 – COM or 2015 – COB).
   - In the Plan Type **select the type of plan** from the drop-down menu.
   - Fill in any strategy information regarding the prospect in the **Narrative** box.
   - In the Primary manager field, search for and **select the primary manager** to the plan.
   - If applicable, search for and **select the secondary solicitor** to assign to the plan. In the Role and **select a Role** from the drop-down.
   - If applicable, search for and **select any constituent participants** and **select a role** from the drop-down.

4. Click **Save**.
In addition to viewing prospect plans from the My Fundraiser dashboard, you can also view it from a constituent record.

Once a plan has been entered, a **STEP** needs to be recorded which describes the next step in the overall prospect strategy.

**VIEW A PROSPECT PLAN FROM A CONSTITUENT RECORD**
1. Open the prospect’s constituent record.
2. Click the Prospect tab.
3. Select the Plans sub-tab.
4. Click on the **plan name** to open.

**ADDITIONAL A STEP TO A PLAN**
1. On My Fundraiser Page go to the **Prospects and Plans** tab.
2. Select the specific prospect plan by clicking on the **Plan Type** to open the plan.
3. On the Details tab under **Planned and Pending Steps** section, click **Add step**.
4. Complete the fields and options on the Add a step window:
   a. In the **Objective** field, enter the purpose for the step.
   b. In the **Owner** field, select a Development Officer to assign to this step. (This defaults to the user.
   c. In the **Stage** field, select the stage of the step.
   d. In the **Status** field, select the status of the step. For upcoming activities, choose **PENDING**.
   e. In the **Expected date** field, enter the date you expect the step to take place.
   f. In the **Comment** field, enter comments to further describe this step.
   g. In the **Contact** method field, select how you intend to contact the prospect for this step.
5. Click **Save**.

Once a step has been entered, there are a number of different ways to go back and edit the details of a step. In an effort to keep things simple we recommend the following:

**TO EDIT AN EXISTING STEP**
1. Open the prospect plan.
2. Select the Details tab.
3. From the Details tab under the **Planned and pending steps** section, click the chevron to the left of the step you want to edit.
4. Click the **STEP** button and select **EDIT**.
5. On the Edit steps window, make any necessary changes.
6. Click **Save**.
FILING A CONTACT REPORT
Filing a contact report keeps a history of your interactions with a prospect. You can also file contact reports for unplanned activity with a prospect.

1. From the My Fundraiser page, select the Pending Activity tab.
2. Click the chevron to the left of the step to add a contact report.
3. In the frame that appears below the step, click Contact report and then select File a contact report or File an unplanned contact report.
4. Complete the fields and options available:
   a. In the Objective field, enter the purpose for the step if different from the original.
   b. In the Actual date and Actual time fields, enter the date and times the fundraiser completed this step.
   c. In the Additional solicitors field, enter each solicitor who participated in the interaction.
   d. In the Participants field, enter each participant included in the interaction.
   e. In the Comment field, enter any additional details about the interaction.
5. Click Save.
6. After the contact report has been saved, it will take you to the Attribute tab. Here is where you add additional staff for credit. Click the add button and complete the following fields.
   a. In Category field, enter Staff Credit.
   b. In the Value field, search for the development officer name that gets credit.
   c. In the Start Date field, add the date.
7. Click Save.

PENDING ACTIVITY
On this tab you can view any steps that have a status of “pending”. From this tab you can edit the step, mark the step complete, file a contact report, or view a prospect plan. To view ALL pending activity (including those entered in through Interactions, click on the “Include General Interactions” and select APPLY).

SUSPECTS AWAITING QUALIFICATION
Potential contributors to UCF, henceforth referred to as ‘Suspects’, will be assigned to development officers for qualification. Suspects can be identified by prospect research or from internal UCF staff.
assign a suspect for qualification, the Prospect Research department will create an Interaction on the constituent record and assign the qualification process to a Development Officer. These assignments will appear on the My Fundraiser dashboard on the Suspects Awaiting Qualification tab. Once a qualification is complete, the development officer will record the interaction outcome by completing the following steps:

**COMPLETING A SUSPECT QUALIFICATION**

1. Click on the chevron next to the prospect name and select Go To Interaction.
2. Select Edit.
3. Change the STATUS to completed and enter in the ACTUAL DATE the qualification took place.
4. Enter in any COMMENTS or notes that you have from the meeting like you normally do for a contact report.
5. Click on the Additional Information Tab and select from the drop-down menu what should happen with the suspect. Select SAVE.

![Edit interaction for Ms. Celeste Jamise Treece](image)

**COMPLETED STEP SUMMARY**

This tab tracks information about the Development Officer’s completed prospect steps both statistically - using the data displayed in the grids on the left side of the screen - and graphically. In the Show for field, select the number of days for which you want to view completed step information.

Select Only show steps owned by this fundraiser to view information for steps on which the fundraiser appears as the owner. If you clear this checkbox, the summary includes steps on which the fundraiser appears as an additional solicitor.

The first grid and graph display completed steps based on the step type (meeting, phone call). Any additional grids and graphs display completed steps based on the plan type. For example, if the fundraiser completed steps for both major gift and planned gift plans, a grid and graph appears for each plan. If the fundraiser completed steps for just the major gift plan, only one grid and graph appear for major gift. To see information about a specific step, click the number link in the Steps column. The Prospect Steps screen appears. From this screen you can go to the selected step, plan, or prospect.
PROSPECT SUMMARY
This includes a historical view of all activity related to a Development Officer. By clicking on the hyperlink of the number of plans, you will be given a detailed listing of each plan and a number of filter capabilities.

OPPORTUNITIES AND ASKS
This tab displays a Development Officer’s fundraising opportunities in a variety of different views. You can filter the data displayed on the tab based on Plan type. In the Overdue section, you can view the number of Overdue asks and Overdue responses for the Development Officer. In the Completed section, you can view the dollar amount and number of Accepted, Canceled, Rejected, and Total solicitations. Using the Show for field, you can select the time period for which you want to view data. Additionally, you can filter data displayed in the Outstanding section by selecting from the drop-down in the Show for field.

OPPORTUNITY PYRAMID
The opportunity pyramid is a way to see how many major giving opportunities a Development Officer has within specific ranges. You can view the opportunities by status (qualified, response pending, accepted, or all).
RESEARCH REQUESTS
This tab provides a listing of all the prospect research requests that a Development Officer has submitted. From this screen you can edit a request by clicking the chevron next to the request and select EDIT. Additionally, you can ADD a research request from this page.

ADD A RESEARCH REQUEST

1. Select ADD from the Research Request tab on the My Fundraiser page.
2. Complete the Add a prospect research request form.
   a. In the Record type field, select the record type to base your request on. Options include Individual, Event, Research List or Organization.
   b. In the Prospects to research grid, enter the constituent(s) to include in the request. You may select more than one constituent. Select the magnifying glass to view the constituent search form.
   c. In the Priority field, select a priority for the request.
   d. In the Date field, select a date when you need the requested information.
   e. In the Research type field, select the type of information you need on the constituents.
   f. Select a reason for the request.
   g. Enter the name of the individual requesting the information. Defaults to the user.
   h. Enter the name of the individual submitting the request. Defaults to the user.
   i. Ignore the SITE section.
   j. Enter any additional notes or directions you may have for the prospect research team in the Notes section.
3. Click Save.

Upon submitting the request, a Research Request record is established. You can access the record on the fundraiser tab by clicking the Request ID number of the request from the Research Requests on their Research Requests second-tier tab. Here you can edit or add to your request. From the Research Request tab you can view a summary of your requests that includes status, priority, request date, and the number of constituents you requested information on.

RECENT CONTACT REPORTS
This tab will provide a listing of any contact reports or interactions that were filed related to a Development Officer’s prospect pipeline.

UPCOMING RSVP’S
This tab allows a Development Officer to see if any of their prospects have RSVP’d for an upcoming event. NOTE: This functionality will be in place when BBIS launches in early 2016.
A COMPREHENSIVE LOOK INTO PROSPECT PLANS

Earlier in this course we learned how to view and add prospect plans from the My Fundraiser page. A prospect plan tracks the prospect’s plan activity, including step detail, ask opportunities, fundraisers associated with the prospect plan, and any planned gifts. We also reviewed how to add and edit a step associated with a prospect plan. In this section we will take a closer look into how prospect plans serve as the main anchor for our prospect management program.

In summary there are two ways to access a prospect plan:
1. In the constituent’s record, click the PROSPECT tab and select the PLANS sub-tab. Then click on the plan name to open the plan itself.
2. From the My Fundraiser dashboard, select PROSPECTS and PLANS. Scroll to the specific prospect and click on the plan name to open the plan itself.

OPPORTUNITIES

An opportunity is added to a prospect PLAN when a specific target solicitation amount has been determined. As a rule, any request over $1,000 should be logged as an OPPORTUNITY and there is only one opportunity for each PLAN.

To Add an Opportunity to a Prospect’s Plan
1. Open the prospect plan.
2. Select the Opportunities tab and click ADD.
3. Complete the fields and options in the add opportunity form.
   a. In the Status field, select a status for the opportunity.
      i. Select Unqualified for those solicitations greater than $100,000 that need approval before solicitation.
   b. The Opportunity type field is not currently being used. Leave blank.
   c. In the Expected ask amount field, enter the amount you intend to solicit.
   d. In the Expected ask date field, enter the date you plan to ask for a gift.
   e. This will be used to record the actual Ask amount. This field is not activated if the opportunity’s Status is “Unqualified.”
   f. In the Ask date field, enter the date you solicited the donor.
   g. In the Likelihood field, rate the likelihood of receiving the entered amount from this prospect.
   h. In the Accepted amount field, enter the amount the prospect agreed to give. This field is activated when the opportunity status is “Accepted.”
   i. In the Response date field, enter the date the prospect agreed to the amount entered in the Accepted amount field.
   j. In the Comment field, enter any comments or notes related to the opportunity.
4. Click Save.
Once a solicitation has taken place or to edit the information within an opportunity, take the following steps to update the opportunity:

EDIT OR UPDATE AN OPPORTUNITY
1. Open the prospect plan.
2. Select the Opportunities tab and click on EDIT.
3. Make necessary changes to the opportunity.
4. Click Save.

SOLICITORS AND PARTICIPANTS
This tab provides detail on other staff or individuals who will participate in the solicitation. Any staff member that participates will be entered as a Secondary Solicitor and an appropriate Role (Development Staff, Researcher, Stewardship Staff or University Faculty/Staff) assigned.

A Plan Participant would include any other individual who plays a critical part in the solicitation and is NOT a staff member. This would include financial advisors, family members, spouse, attorney, volunteer or others. NOTE: Any participant that is added will need to have a constituent record in CRM. Contact Data Management if you need to add a constituent record.

DOCUMENTATION
From the Documentation tab, you can add notes, attachments such as Word documents, and media objects to your plan record. This would be the place to attach a copy of a written proposal.

PLANNED GIFTS
Planned Giving Officers are able to record information on planned gifts on this tab. Depending on the specific planned gift vehicle, the form will adjust to accommodate fields specific to each gift type.

ATTRIBUTES
Attributes are generally used to store specialized information pertaining to a prospect plan. Currently there is only an attribute set up for Sponsored Research.

MANAGER HISTORY
This tab displays a list of previous primary managers along with the dates they served as a manager for the plan.
MAJOR GIVING MANAGEMENT

This section contains information helpful in managing the major giving operation. From these pages, you can view information about steps, fundraisers, prospects, opportunities, and much more.

FUNDRAISERS AND STEPS
Below is a summary of the sections available. For a large majority of these pages you are able to view information related to members of your team (including direct and indirect reports).

<table>
<thead>
<tr>
<th>TAB</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>OVERDUE STEPS</td>
<td>This tab tracks steps not marked “completed” by the assigned Expected Date.</td>
</tr>
<tr>
<td>STEPS PLANNED</td>
<td>This tab tracks information about upcoming prospect steps.</td>
</tr>
<tr>
<td>STEPS COMPLETED</td>
<td>This tab tracks information about completed prospect steps both statistically - using the data displayed in the grids on the left side of the screen - and graphically.</td>
</tr>
<tr>
<td>CANCELED/DECLINED STEPS</td>
<td>This tab tracks steps that have been canceled or declined.</td>
</tr>
<tr>
<td>FUNDRAISERS</td>
<td>This tab displays development officer statistics. If you select Only show steps owned by this fundraiser, the results will exclude any steps on which the fundraiser appears as an additional solicitor.</td>
</tr>
<tr>
<td>SUSPECTS PENDING QUALIFICATION</td>
<td>This shows suspects that have been assigned out to Development Officers for qualification.</td>
</tr>
<tr>
<td>RECENTLY ADDED REVENUE</td>
<td>This shows gifts that have been received recently.</td>
</tr>
</tbody>
</table>
**PROSPECTS**
This tab provides information about the prospects currently in the UC pipeline.

<table>
<thead>
<tr>
<th>TAB</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>PROSPECTS IN PIPELINE</td>
<td>The prospect plan pipeline displays the total number of prospect plans currently in the pipeline along with a breakdown of prospects based on plan types. The breakdown displays the number of prospects at each plan stage for each plan type.</td>
</tr>
<tr>
<td>UNASSIGNED PROSPECTS</td>
<td>The Unassigned Prospects tab displays all prospects in your system that have yet to be assigned a prospect manager fundraiser. From this tab, you can view plans and prospect records, assign fundraisers, and change and view steps.</td>
</tr>
<tr>
<td>PROSPECTS WITHOUT RECENT ACTIVITY</td>
<td>The Prospects With no Recent Activity tab displays all prospects in your system that have no step activity recorded within the past 90 days. From this tab, you can view plans and prospect records.</td>
</tr>
</tbody>
</table>

**OPPORTUNITIES and ASKS**
This section contains a number of tools useful in assessing the opportunities currently in the pipeline.

<table>
<thead>
<tr>
<th>TAB</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>SUMMARY</td>
<td>Provides summary information on Opportunities, overdue asks, outstanding requests and completed Opportunities.</td>
</tr>
<tr>
<td>OPPORTUNITIES BY AMOUNT RANGE</td>
<td>This tab displays ask opportunities and the various gift ranges associated with the asks based on the selected criteria/filters.</td>
</tr>
<tr>
<td>OPPORTUNITY PYRAMID</td>
<td>The Opportunity Pyramid tab tracks opportunities and asks in a pyramid, based on the filtering criteria you select. (Click VIEW REPORT)</td>
</tr>
</tbody>
</table>
WEALTH AND RATINGS

Wealth information is data used to track your constituent’s estimated wealth. Knowing the types and amount of wealth your constituents possess allows you to better determine cultivation strategies and determine the constituent’s giving potential.

<table>
<thead>
<tr>
<th>TAB</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>WEALTH SUMMARY</td>
<td>Summarizes all data contained on the Affiliations, Assets, Biographical, and Giving tabs in an organized, easy-to-read format.</td>
</tr>
<tr>
<td>MODEL SCORES</td>
<td>Contains an integrated analytics tool that helps identify the prospects most likely to give a gift to UCF.</td>
</tr>
<tr>
<td>ASSETS</td>
<td>Houses real estate, business, securities, and other asset ownership information, in addition to income and compensation data and wealth indicators.</td>
</tr>
<tr>
<td>GIVING</td>
<td>Houses the prospect's giving information, such as donations to UCF, philanthropic gifts to other organizations, and political donations.</td>
</tr>
<tr>
<td>AFFILIATIONS</td>
<td>Displays information about the prospect's non-profit and foundation affiliations, in addition to network connections and constituencies.</td>
</tr>
<tr>
<td>BIOGRAPHICAL INFORMATION</td>
<td>Houses personal information, such as name, marital status, and gender; along with contact information, relationships, interests, and education.</td>
</tr>
</tbody>
</table>
RULES TO LIVE BY

- A prospect must have a constituency code of “prospect” in order for you to view the Prospect Tab in CRM.

- All prospects with an assigned prospect manager should have an active prospect plan.

- There is only 1 Prospect Manager allowed per constituent.

- When you know what kind of solicitation you will ask for, add an Opportunity to the prospect plan.

- There is only one opportunity for each prospect plan.

- When filing a contact report, you must choose the Prospect Management category.

- Call reports will need to be entered into iCATs within 72 hours. (This is a change from the current policy of 30 days to enter call reports.)

- When assigning roles to an Opportunity, ensure that meaningful involvement is recorded so that proper credit is given to all staff involved with the solicitation.

- For opportunities greater than $100,000 enter them as UNQUALIFIED. Once approval is received it will be changed to QUALIFIED. Please allow two weeks for these approvals to be completed.

<table>
<thead>
<tr>
<th>IMPORTANT TRACKING TIPS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FOR CONTACT CREDIT</strong></td>
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<tr>
<td><strong>FOR $ CREDIT</strong></td>
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<tr>
<td><strong>GOAL CALCULATIONS</strong></td>
</tr>
<tr>
<td><strong>STAFF CREDIT ATTRIBUTE</strong></td>
</tr>
</tbody>
</table>
# NEW TERMINOLOGY

<table>
<thead>
<tr>
<th>CRM</th>
<th>ADVANCE</th>
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</thead>
<tbody>
<tr>
<td><strong>Prospect</strong></td>
<td><strong>Prospect Assigned</strong></td>
</tr>
<tr>
<td>Constituent code equals Prospect.</td>
<td></td>
</tr>
<tr>
<td><strong>Suspect</strong></td>
<td><strong>Prospect Qualification</strong></td>
</tr>
<tr>
<td><strong>Prospect Manager</strong></td>
<td><strong>Primary Assignment</strong></td>
</tr>
<tr>
<td>The highest relationship level -</td>
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<tr>
<td>ultimately responsible for</td>
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<tr>
<td>monitoring and managing the</td>
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<tr>
<td>relationship with the constituent.</td>
<td></td>
</tr>
<tr>
<td><strong>Primary Manager</strong></td>
<td><strong>Proposal Assignment</strong></td>
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<tr>
<td>Person responsible for the</td>
<td></td>
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<tr>
<td>Prospect Plan.</td>
<td></td>
</tr>
<tr>
<td><strong>Secondary Solicitor</strong></td>
<td><strong>Internal Partner</strong></td>
</tr>
<tr>
<td><strong>Owner</strong></td>
<td><strong>Author</strong></td>
</tr>
<tr>
<td>Staff responsible for a specific</td>
<td></td>
</tr>
<tr>
<td>interaction.</td>
<td></td>
</tr>
<tr>
<td><strong>Prospect Plan</strong></td>
<td><strong>Strategy Statement</strong></td>
</tr>
<tr>
<td><strong>Opportunity</strong></td>
<td><strong>Proposal</strong></td>
</tr>
<tr>
<td><strong>Prospect Status</strong></td>
<td><strong>Prospect Types</strong></td>
</tr>
<tr>
<td>Assigned after qualification.</td>
<td></td>
</tr>
<tr>
<td>Options include: Qualified, Not</td>
<td></td>
</tr>
<tr>
<td>a Prospect Now or Not a Prospect</td>
<td></td>
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<tr>
<td>Ever.</td>
<td></td>
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</tbody>
</table>
# QUICK REFERENCE

<table>
<thead>
<tr>
<th>PROSPECT TAB</th>
<th>MY FUNDRAISER DASHBOARD</th>
<th>FUNDRAISER TAB</th>
</tr>
</thead>
<tbody>
<tr>
<td>PROSPECT SUMMARY</td>
<td>PENDING ACTIVITY</td>
<td>PENDING ACTIVITY</td>
</tr>
<tr>
<td>PLANS</td>
<td>PROSPECTS AND PLANS</td>
<td>PROSPECTS AND PLANS</td>
</tr>
<tr>
<td>PROSPECT TEAM</td>
<td>SUSPECTS AWAITING QUALIFICATION</td>
<td>SUSPECTS AWAITING QUALIFICATION</td>
</tr>
<tr>
<td>PLANNED GIFTS</td>
<td>GRANTS</td>
<td>GRANTS</td>
</tr>
<tr>
<td>FUNDING INTERESTS</td>
<td>PLANNED STEP SUMMARY</td>
<td>FUNDRAISER SUMMARY</td>
</tr>
<tr>
<td>CAMPAIGNS</td>
<td>COMPLETED STEP SUMMARY</td>
<td>PLANNED STEP SUMMARY</td>
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