



Prospect Management Setup & Tracking in Your Database

Presented By: Tricia Marsherrall, Marsherrall Partners, LLC
Tuesday, December 6, 2022 | 2:00 – 3:00 p.m. EST



Donation Forms | Event Registration
Text Fundraising | Peer-to-Peer | Auctions

A little housekeeping...



We're recording this webinar!

All registrants will receive an email containing a link to the recorded webinar AND a ton of other resources!



Feel free to ask questions!

Use the Questions chat box to ask your questions.
We will have a Q&A session at the end of the presentation.



FUNDRAISING TECH

Made for you



Designed with you in mind

Designed for fundraisers by fundraisers through customer-led development input



Time saving data tools

Save time, attract and retain donors, and raise more money with all of your fundraising data in one place



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Easily integrate with your third-party CRM, email provider, and accounting software



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Powerful Fundraising Technology + Donor Database Management



Raise More, Manage Less

**Donation Forms | Event Registration
Text Fundraising | Peer-to-Peer | Auctions
Integrations & Data**



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**Database Management |
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Data Analytics | Fundraising
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Today's Speaker



Tricia Marsherrall | Founder & President, Marsherrall Partners, LLC

Tricia Marsherrall is the Founder & President of Marsherrall Partners, LLC, a consulting firm specializing in nonprofit donor database management & operations support and virtual & traditional fundraising events. Tricia has worked in dozens of databases, analyzing hundreds of thousands of records and will share the lessons she's learned along the way.

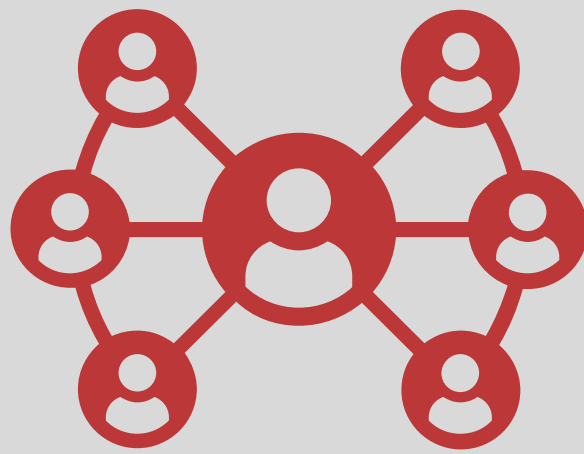
AGENDA

- Prospect Management Fundamentals
- Common Roadblocks
- Tips to Leverage Your Database
- Your Data Challenge Speed Rounds
- Tools to Use Right Away
- Q&A

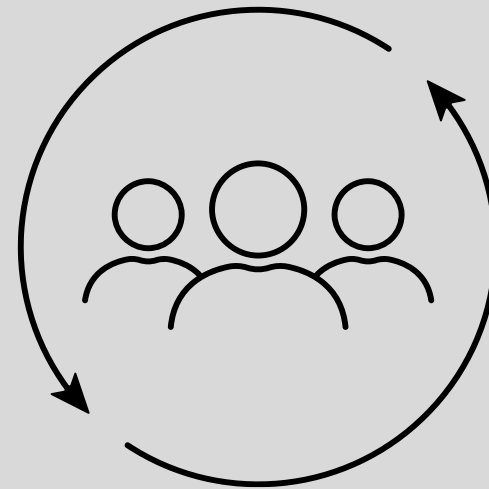
Prospect Management Fundamentals



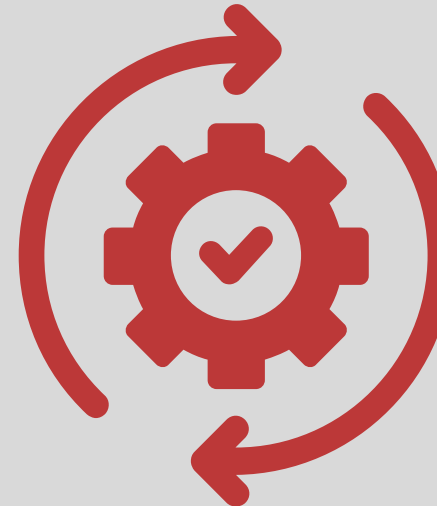
Defining
Strategy



Strengthen Donor
Relationships



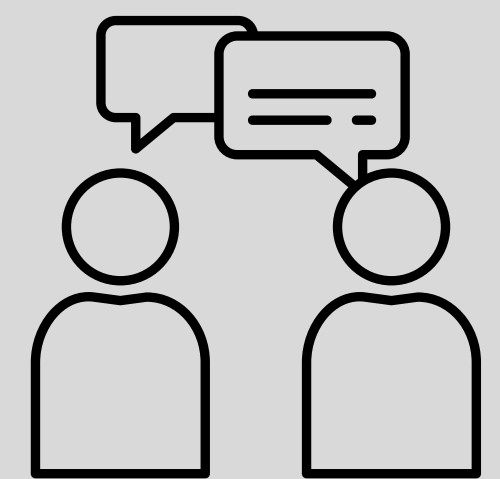
Donor
Retention



Increased
Efficiency

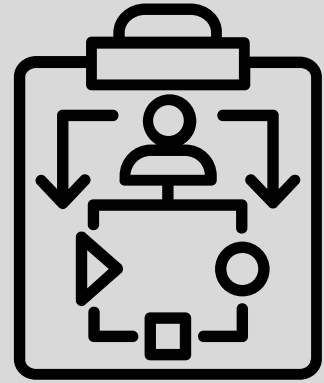


Increased
Donor Giving



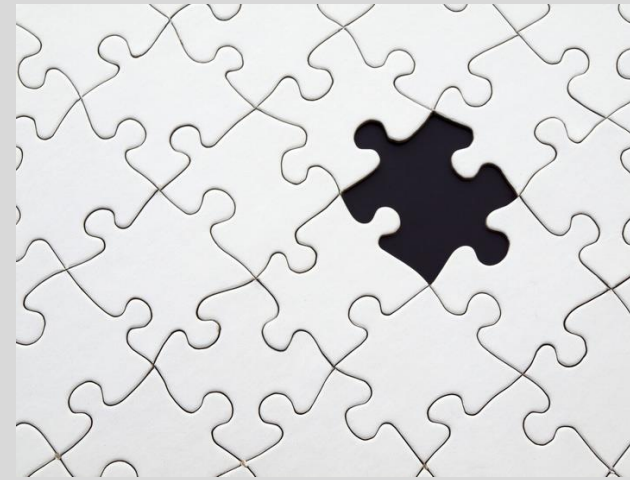
Improved
Communications

Common Roadblocks



Lack of Strategy

Define priorities & organizational strategic initiatives



Missing Information

Data is tracked outside of the database.



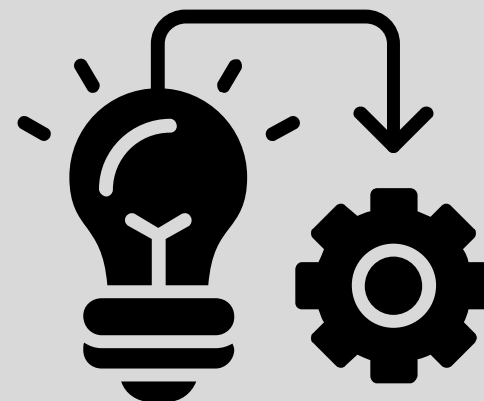
Portfolio Overload

Gift officers have too many people in their portfolio.



Poor Data Integrity

The quality and health of the data and database infrastructure is questionable



Competing Priorities

Staff workloads prevent successful implementation.



Undefined Metrics

Undefined goals and progress reporting.



Tips to Leverage Your Data



Define Your Goals

Align fundraising prospect management goals with overall strategic plan.



Standardize Procedures

Document written policies and procedures.



Prepare the Database

Review data, current coding infrastructure and perform data clean-up.

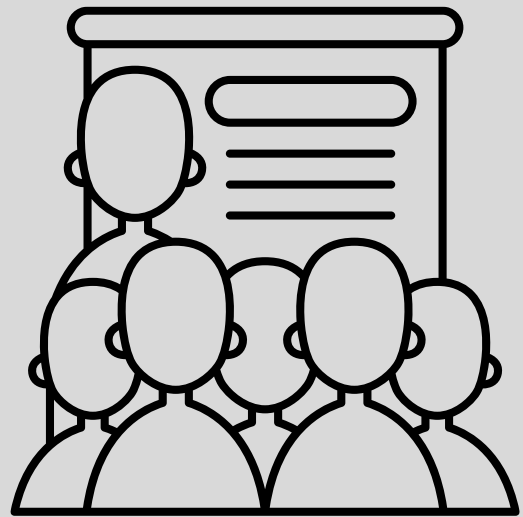


Review Existing Portfolios

Analyze current gift officer portfolio size, composition, and donor capacity.



Tips to Leverage Your Data



Train Your Team

Provide comprehensive training in 1:1 and group settings.



Track Metrics

Track metrics and progress toward goal.



Establish Feedback Loop

Meet regularly to report progress & share feedback



Perform Data Health Checks

Create queries and perform regular data health checks.

Data Challenge Speed Rounds

Please submit your questions
or office examples!

Tools to Use Right Away

1) Create Standard Definitions:

- Major gift
- Substantive Action
- Prospect Status: Identification, Qualification, Cultivation, Solicitation Stewardship
- Prospect Classification: Transformational Donor, Principal Donor/Prospect, Major Donor/Prospect, Annual Donor/Prospect, Planned Giving, Events Giving, Relationship Prospect
- Fundraiser Types: Primary, Secondary, Key Influencer, Former Solicitor

Tools to Use Right Away

2) Review Current Portfolios:

- Portfolio Size
- Recent Giving Analysis
- Capacity Analysis
- Portfolio Composition: # of prospects in each stage
- Fundraiser Types: Primary, Secondary, Key Influencer, Former Solicitor

Tools to Use Right Away

3) Prepare the Database:

- Review where data is currently tracked
- Determine missing data and threats to data integrity
- Existing code restructure and cleanup
- Data Health Checks
- Dashboards
- Mandatory Fields



Questions?

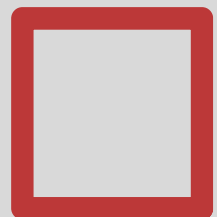
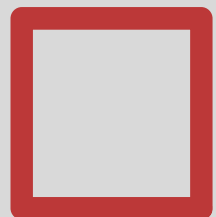


This webinar program qualifies for 1 point of continuing education toward maintaining the Certified Fundraising Executive Management (CFRE) credential.

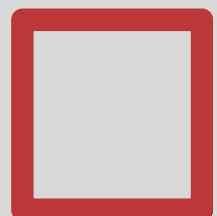
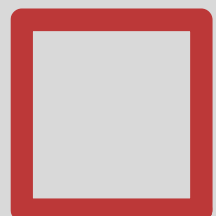
THANK YOU & KEEP IN TOUCH!



MARSHERALL PARTNERS
CONSULTING SERVICES



TRICIA MARSHERALL, MBA
FOUNDER & PRESIDENT



TRICIA@MARSHERALLPARTNERS.COM
(585) 354-5505
MARSHERALLPARTNERS.COM



Thank you for joining!

For more information on Qgiv's fundraising platform, contact:

contactus@qgiv.com | 888-855-9595

For more information on Marsherrall Partners, LLC, contact:

tricia@marsherrallpartners.com | 585-354-5505