

3 POWERFUL WAYS TO USE OUR DASHBOARD

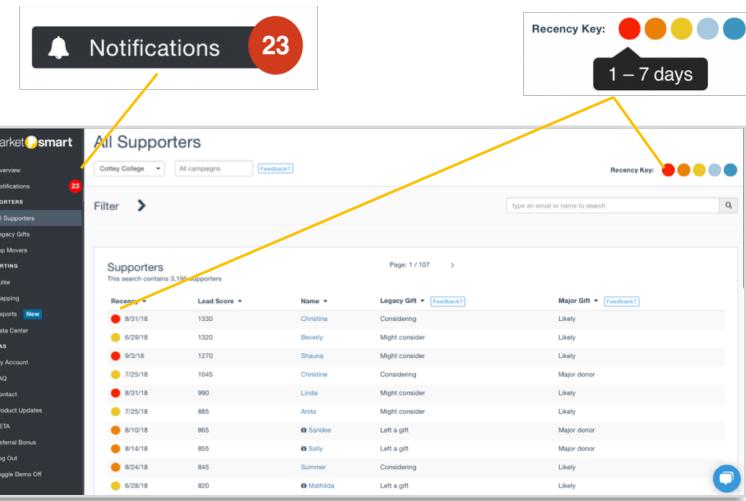
1 Lead generation review

If you have new notifications, we recommend you review them first. Remember, **recency of engagement is the best indicator** of the likelihood that your outreach will result in a meaningful conversation.

In fact, prompt outreach has been found to make you nearly 700% more likely to have a **meaningful conversation** with a donor prospect (according to the Harvard Business Review).



James B. Holroyd, Kristina McElheran, and David Elkington, "The Short Life of Online Sales Leads," Harvard Business Review



2 Prioritization / list-building

Some users prefer to **sort by Lead Score** to prioritize their leads. Lead score is determined by a supporter's demographics, verbatims, and digital body language.

945

But most prefer to dive **use the Filter** to build a list or the **Map**



Filter options include:

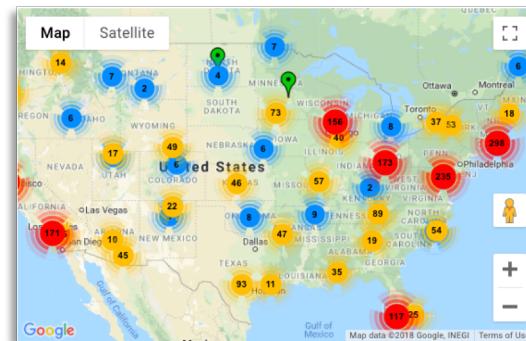
Campaigns Select responses to the campaign(s) you would like to view.

Gift Likelihood Major Gift Opportunities
• Donor Advised Fund
• Family Foundation
• Appreciated Assets
• Campaign Support
• Talk to Gift Officer
• Property
• Charity Ranking

Legacy Gift Opportunities
• Gift Consideration
• Consideration Movement

Demographics
• Age Range
• Education
• Family Status
• Marital Status

Location
• State or Province
• City
• Zip code



3 Qualification / discovery

Discover your supporters' **self-described** capacity, interests, willingness to give, passions, and online engagement patterns.

9/4/18 945 Greg Warner

Just click on a supporter's name to see their:

Verbatims survey answers
Digital Body Language what they are doing online
Score Impact how they've accumulated their score
Donor Journey if they changed their legacy consideration stage

- Already planned a legacy gift = a great prospect for a 2nd legacy gift
- Described their own capacity (i.e. - educated, no children, has a DAF)
- Detailed their passions, interests, why they care, who inspired them to care
- Engaged further online (i.e. - watched the video about the capital campaign)
- Changed their consideration stage

⚠ Remember, sometimes supporters say they will not consider a legacy gift even though they already did so (or are considering doing so). This is a sensitive topic. So don't disqualify donors solely due to verbatims—especially if they have no children and/or their digital body language reveals interest.

The 'Verbatims' section shows a 2018 Survey with questions about interest in the mission of Coffey College, influence of an influencer, relationship with a person, engagement with Coffey College, and core values. It includes a dropdown for 'InspiringPerson' and a note about alumnae events.

The 'Digital Body Language' section shows June 2018 activity, including visiting the microsite and PDF Guide Download.

The 'Score Impact' section shows a table of dates, descriptions, and score impacts, such as 'Indicated they are likely to talk to a Gift Officer' and 'Deep visit (2 minutes or more than 3 pages)'.

The 'Donor Journey' section shows a timeline with stages: Left a gift, Considering, Might consider, and Will not consider, with specific dates for each stage.