Executive Summary
Every nonprofit wants to turn prospects into donors — some are better at it than others. What makes the difference? Moves Management.

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Embracing Technology for Moves Management® Success

What is Moves Management?

Do you visit prospects, create gift proposals, solicit individuals or organizations for donations, and cultivate and steward donors? The actions you take to bring in donors, forge relationships and keep the contributions coming are known as Moves, and Moves Management, simply put, is the system of policies, procedures and practices that directs these actions.

An effective Moves Management program will improve your bottom line and facilitate a number of internal processes. Look for an enhancement of:

- Constituent relationship management (CRM): Finding, analyzing and tracking constituent information to form personal, lifelong relationships with your donors.
- Solicitation strategy: Increasing the success of your efforts by targeting prime donor prospects.
- Program and pipeline management: Move prospects through successive pipelines: identify, qualify, cultivate and solicit — with the intent of progressively turning them into donors and predicting future gifts.
- Strategic analysis and execution: Evaluating your program in light of specific goals and objectives to ensure optimal results.

A successful Moves Management program increases the success rate of every solicitor action, communication and appeal. As with any new policy, procedure or process, however, it is important to begin with a foundation of solid goals and objectives.

Getting Started

Goal Setting

Having a series of short, intermediate and long-term benchmarks for your Moves Management program is the first step toward success. Specific goals give your fundraising team something to work toward, allow leadership to track progress and keep everyone focused and on task.

Keep in mind that it is important to define what success means for your Moves Management program. Some organizations evaluate success by the total dollars raised, while others look at the number of moves made per prospect within a given time frame. The truth is that virtually any criteria meaningful to your organization can be used as a goal as long as you establish measurable and quantifiable benchmarks to gauge progress and verify completion. Vague criteria only serve to lessen accountability and weaken the overall program.

Each organization has different needs and resources, so try to articulate specific goals for your group. The following questions may help you get started.

- How many development professionals are on your staff?
- What are the distinct "stages" of your fundraising process?
- What is your timeframe? Six months? A year?

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Planning Your Information Tracking

Once you spell out the goals and objectives of your program, identify the information your development officers currently track. Is this information useful in achieving your goals? Is there any additional information you don't currently track that would help to improve relationships with donors and prospects?

If you head a university foundation, for instance, do you track athletic teams, social organizations and extracurricular activities? Do you know your prospects' donor history with other organizations? The types of organizations and initiatives they will and will not give to? Consider the following types of information and think about how each could help to enhance personal relationships with your prospects.

- Biographical information
- Actions
- Interests
- Relationships
- Giving history

Every bit of additional information helps to personalize and improve relationships with constituents, as well as allows your solicitors to tailor Moves to each prospect. Knowing, for instance, that a prospect has an interest in art might suggest a cultivation meeting at a campus art center. If a prospect is interested in a particular research topic, then a face-to-face with your lead researcher might be more appropriate. If you decide a particular piece of information may be helpful — an interest in women's issues, for instance — try to figure out how to incorporate it into your information tracking system.

Moves and Communication Tracking

Tracking solicitor actions — phone calls, personal meetings, correspondence, appeals or anything else done on behalf of a prospect — is just as important as keeping tabs on a prospect's personal information. Being able to see what communication has taken place with a particular constituent, as well as what was said in each of those exchanges, is invaluable in the planning and management of solicitor Moves.

Make sure your team tracks every action and communication with a constituent. Tracking the history of telephone calls, e-mail and correspondence will provide a quick overview of the constituent's relationship with your organization. Likewise, knowing that a prospect indicated interest in a particular scholarship fund, would like to volunteer for a program initiative or follows the local art scene can be priceless information in determining the next Move. In a similar manner, document any ideas for future activities to help with strategic planning. Compile this information in a central database to allow your staff instant access to details on each constituent, ensuring that everyone on your fundraising team has comprehensive, accurate and timely information.

Establishing Policies and Procedures

Implementing procedures to ensure all entries are accurate and up-to-date is just as important as knowing what information to track. Who will be in charge of getting information? Who will update information?

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To maximize the capabilities of your information tracking system all users should maintain a commitment to entering the requisite donor and prospect information in the database. Design a policy that ensures all constituent communications and Moves are entered into the database and make sure that all members of your team understand what information and actions fall under their area of responsibility.

Try to articulate goals for developing, improving, and fine-tuning your data capture and recording procedures. One sure-fire way to enhance the quality and amount of information in your database is to consolidate various knowledge storehouses — that spreadsheet on last year's donors, the list of bidders from the silent auction — into a centralized information system. This will ensure that anyone in your organization will have instant access to up-to-date information on any constituent, his or her donor history and biographical details. Having a single system of record and ensuring comprehensive information tracking are two fail-safe ways to improve constituent relations — and turn prospects into donors.

If your development officers are not tracking information, communications and Moves effectively, why not? Do they need additional training to fully utilize your information system and all of its fundraising potential? Would customizing your system help development officers and data entry staff maximize the quality and accessibility of information?

Building Your Moves Management® Strategy

Strategic Thinking

Setting goals and implementing an effective information-tracking policy establishes a solid foundation on which to build your Moves Management strategy. Now look at some of your processes. How does your organization identify core prospects? Do you consider capacity, giving history, custom modeling data, electronic screening — or just plain word of mouth?

Once prospects are identified, most organizations use a combination of internal and external research to determine prospect ratings. Many organizations use a simple system of inclination and capacity ratings. That is, rate your prospects on their inclination to give to your organization. This will be your inclination rating. Similarly, rate the capacity of each prospect to donate. This will be the capacity rating and will usually be given in a dollar range. Individuals with both high inclination and capacity ratings generally will be your prime targets. Some organizations also consider a readiness rating — a measure of how close a prospect is to making a gift.

Make sure your solicitors and/or researchers update the ratings regularly, such as after significant contact, to provide an accurate and up-to-date measure of your prospect's status. Integrating your inclination, capacity and readiness ratings into your information tracking system with a time stamp and initials of the author ensures that all users will know how recent the information is. Once you've implemented your new prospect procedures, compile and format your ratings into reports to identify key targets for your campaign, as well as gauge its progress.

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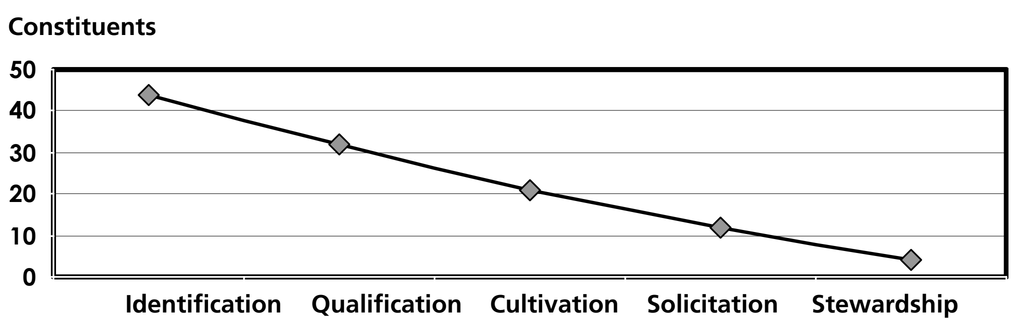
Calculating Solicitor-to-Prospect Ratios

One key to ensuring success for your solicitors is choosing an appropriate solicitor-to-prospect ratio. While it is healthy to push each of your fundraisers, overloading them can reduce the amount of attention paid to each prospective donor and negatively impact results.

Developing a prospect pipeline is one way to estimate solicitor workload. The pipeline operates on the assumption that for every donor, a certain number of prospects must be identified, qualified and cultivated. Having the appropriate number of prospects in each stage of the pipeline is one way to help ensure a steady stream of donations.

The ratio of the pipeline, of course, depends on a number of factors: goals, resources, time constraints and the needs of each organization, to name a few. For instructional purposes, however, consider an 11:8:5:3:1 prospect pipeline (see figure below). This pipeline operates on the assumption that for every donor, 11 prospects must be identified, eight qualified, five cultivated and three solicited.

The 11:8:5:3:1 Prospect Profile



Development officers can extrapolate from the pipeline to estimate how many prospects need to be identified to reach goals. For instance, if the goal is 100 new major donors by the end of the year, solicitors can plan on identifying approximately 1,100 prospects, qualifying 800, cultivating 500 and soliciting 300. Keep in mind this is just one model for determining solicitor workload. Depending upon the needs of your organization, there are dozens of other, perhaps more useful measures to use in your strategic planning.

Background and Foreground Moves

Many organizations use the terms "Moves" and "actions" interchangeably, yet not all Moves are created equal. Distinguishing between passive and intentional Moves is an excellent way to guide development officers in their solicitation efforts.

Passive moves are unintentional and include mass e-mail, newsletters and sending an article of interest or birthday card, for example. These are actions designed to enhance the relationship with the prospect but do not contribute directly to a solicitation.

Foreground moves are actions designed to help close the gift. These could include visits with a prospect or key advisor, a meeting with the president of your organization, a visit to your organization's offices and the actual ask.

Solicitors should document their Moves and note the time, date, type and purpose of the contact, as well as any relevant notes. Tracking this information in your system will allow instant access to the history of background and foreground Moves with any particular constituent, permitting solicitors to quickly see what needs to be said or done next to move donors through the pipeline.

Additionally, tracking Moves in your system will enhance your reporting capabilities and vastly improve your ability to analyze your development efforts. A report on a particular solicitor's actions, for instance, allows executives to see which Moves are producing results and which are not. Such feedback helps to fine-tune actions to particular prospect and donor types, streamlining the solicitation process and increasing your program's effectiveness

Solicitor Evaluation

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An important component of a successful program is clear, measurable solicitor goals and key performance indicators (KPI). Successful goals may include a combination of dollars raised (result) and Moves made (volume). Result factors are hard numbers that indicate if a solicitor is successful with their actions while volume factors measure

Examples of Solicitor Evaluation Criteria

Volume	Number of Moves per year (For example, 100 prospects x 8 foreground actions = 800 Moves per year)
	Number of actual asks over a given period of time
	Number of foreground moves per solicitor
	Number of background moves per solicitor
Results	Number of closed gifts
	Target ask versus actual gift amounts and variance, by solicitor
	Percent of solicitor goal achieved

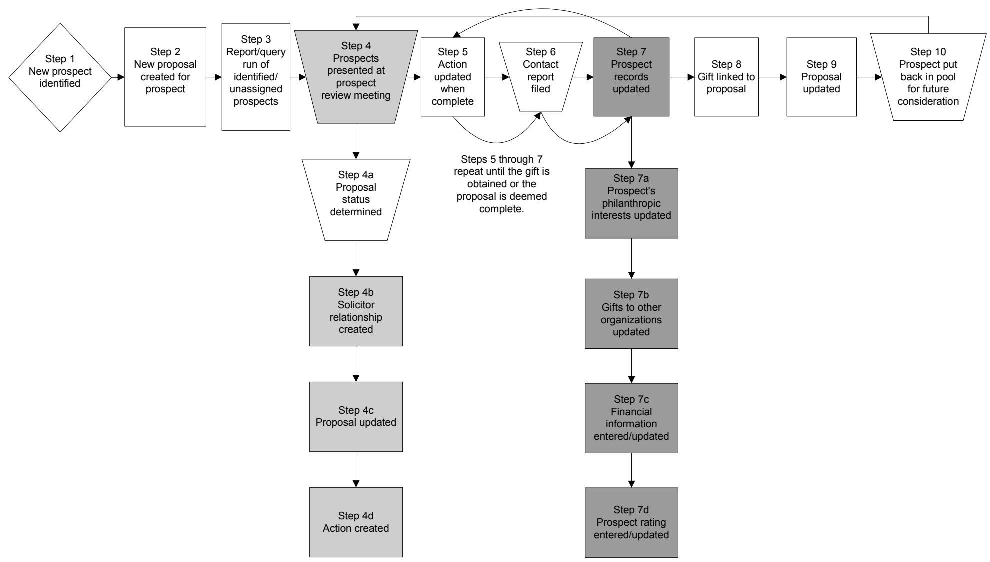
effort and activity. Below are examples of solicitor benchmarks that can be used to gauge solicitor effectiveness and program progress.

Implementing an effective Moves Management strategy today will yield results for your organization for years to come. Being able to accurately forecast gift income from prospects and evaluate staff performance enhances your overall fundraising program while helping you raise more money.

Evaluation criteria can help you identify solicitors who may need additional assistance in closing gifts, allow you to reward solicitors who exceed expectations, assist with budgeting and hiring and provide feedback on your prospect pipeline.

An Example of a Moves Management® Workflow

The workflow below was developed for the prospect research team of a foundation development office. Internal processes will vary from organization to organization.



Conclusion

Implementing an effective Moves Management strategy today will yield results for your organization for years to come. Being able to accurately forecast gift income from prospects and evaluate staff performance enhances your overall fundraising program while helping you raise more money.

Blackbaud's Professional Services Division can assist you in creating or optimizing your organization's Moves Management program. If you have specific questions about this executive briefing, or if you would like more information about the following products and services, please call 1-800-443-9441 or e-mail solutions@blackbaud.com.

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- **Blackbaud's The Raiser's Edge™** — Software designed to maximize the moves management philosophy by helping you manage donor and prospect relationships, campaigns, membership, volunteers, events and more.
- **Blackbaud Analytics** — A holistic approach to prospect screening that combines

ProspectPoint™ — a true custom modeling and scoring service — with **WealthPoint™** — a comprehensive wealth identification service to help you identify your best prospects and research the right amount to ask for.

This paper was coauthored by Kathryn Johnson and Bo Crader, members of Blackbaud's Consulting Services Group.

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