

MOVES MANAGEMENT

Developing donor relationships

“Moves Management” refers to a process of moving someone toward an identified objective through a series of planned communications activities. For example, a series of letters, phone calls and email communication may be undertaken to invite alumni to attend a fundraising event or to donate to a capital fund campaign.

The Moves Management feature is based on building a communications plan (called an “Action Plan”) consisting of a sequence of actions to achieve the desired outcome within the desired timeframe. Reusable templates (called “Action Series”) can be created and used to initially create action plans for identified constituents in groups. The steps in the action plan for an individual constituent can then be modified on an individual basis.

In addition to establishing action plans, users have tools to manage the progress of each action plan, indicating if or when a constituent completes each step, as well as whether the goal of the action plan has been achieved with that constituent. These tools are also available from the Web portal, including the ability to log pledges online.

Moves Management provides alumni/donor development personnel with a robust, flexible way to initiate and manage a series of communication activities aimed at the achievement of institutional goals, such as fundraising campaign objectives.

