TRAINING WORKBOOK

SCT Banner Advancement

Prospect Management

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Section A: Introduction

Overview

Workbook Goal

The goal of this workbook is to provide you with the knowledge and practice to accurately create and track prospects at your institution.

This workbook is divided into three sections:
- Introduction
- Set-up
- Day-to-day operations

Intended Audience

Advancement Office Officers and Staff

Client Responsibility

You must complete several tasks before the instructor arrives at the site to conduct the course. The instructor will define elements within Banner in order to complete this workbook topic. If you are unable to complete these tasks before the course is scheduled, please contact your account manager for assistance.

In this section

These topics are covered in this section

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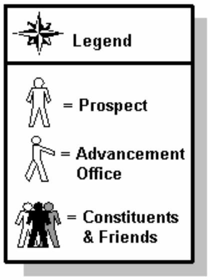
Process Introduction

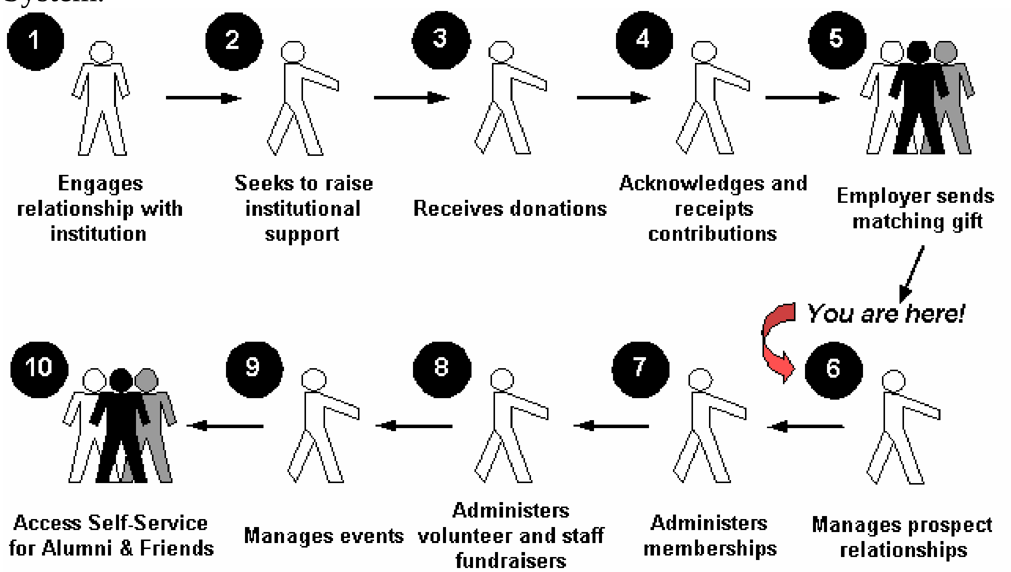
Introduction

This module contains features that support prospect management identification, pool segmentation, research and tracking.

Flow Diagram

This diagram highlights the processes used within the Banner Advancement System.





About the process

- This process is initiated when a constituent is identified as a prospect, according to the institution's definition of a prospect.

Section B: Set Up

Overview

Purpose	The purpose of this section is to outline the set-up process and detail the procedures to set-up your Banner system to manage prospects.
Intended Audience	Advancement Office employees. More specifically, personnel responsible for creating and maintaining major donor records and campaign volunteer information for the alumni, development, and foundation offices, along with staff members who manage campaigns and gift designations.
Objectives	At the end of this section, you will be able to: • Identify and describe Banner forms and processes used for set-up • Create rules and set parameters used to process data
Prerequisites	To complete this workbook, you should have completed the SCT Education Practices computer-based training (CBT) tutorial “Banner 6.x Fundamentals: Navigation and Forms,” or have equivalent experience navigating in the SCT Banner system.

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Overview, Continued

In this section

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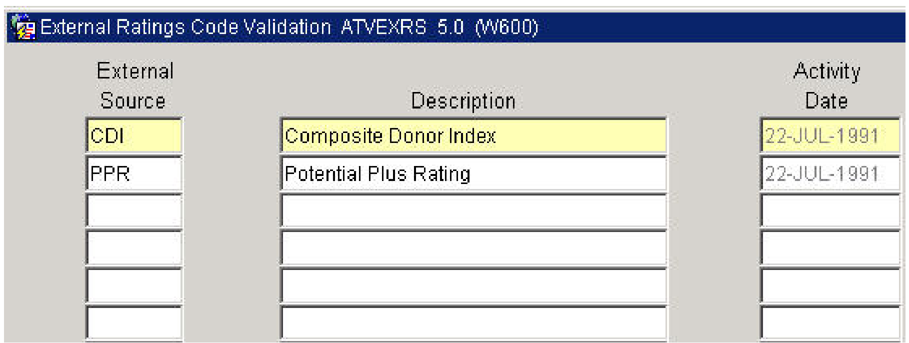
External Ratings Code Validation Form (ATVEXRS)

Introduction

The External Rating Code Validation Form (ATVEXRS) lets you define codes and descriptions to track ratings an institution may receive about people or organizations from outside the institution. Types of ratings could include a lifestyle category, a potential of giving rating, etc.

Screen Image

The External Ratings Code Validation should be accessed and the existing information should be reviewed. Anything pertaining to your institution that needs to be added or deleted can be done so via the **Insert/Delete Record** functions.



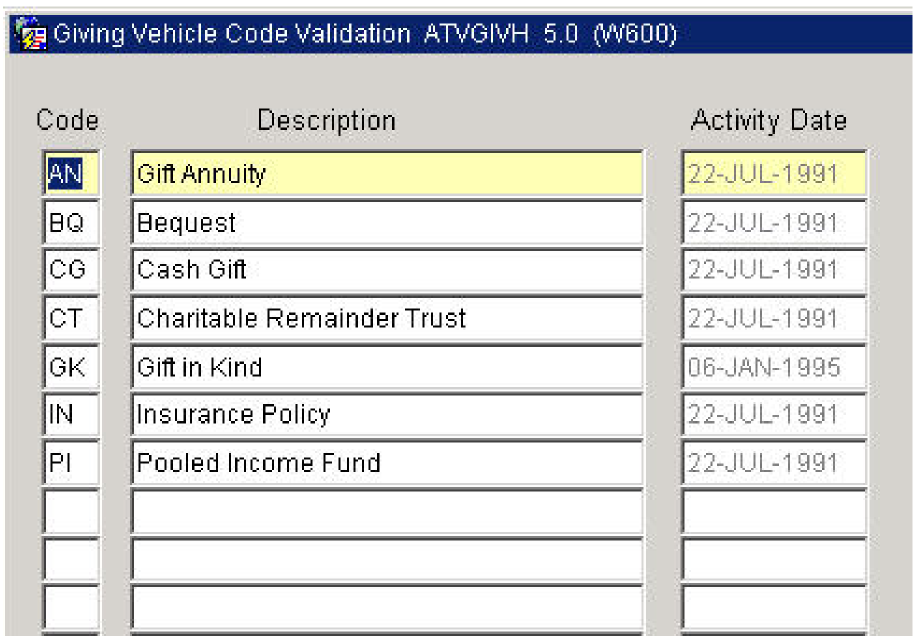
Giving Vehicle Code Validation Form (ATVGIVH)

Introduction

The Giving Vehicle Code Validation Form (ATVGIVH) lets you maintain user-defined codes that will track the different types of gifts that can be made by a prospect for a specific project/interest. The Giving Vehicle Code is assigned to a prospect and a project/interest in the Project/Interest Area window on the Prospect Information Form (AMAINFO).

Screen Image

The Giving Vehicle Code Validation Form should be accessed and the existing information should be reviewed. Anything pertaining to your institution that needs to be added or deleted can be done so via the **Insert/Delete Record** functions.


Giving Vehicle Code Validation ATVGIVH 5.0 (W600)

Code	Description	Activity Date
AN	Gift Annuity	22-JUL-1991
BQ	Bequest	22-JUL-1991
CG	Cash Gift	22-JUL-1991
CT	Charitable Remainder Trust	22-JUL-1991
GK	Gift in Kind	06-JAN-1995
IN	Insurance Policy	22-JUL-1991
PI	Pooled Income Fund	22-JUL-1991

Move Type Code Validation Form (ATVMOVE)

Introduction

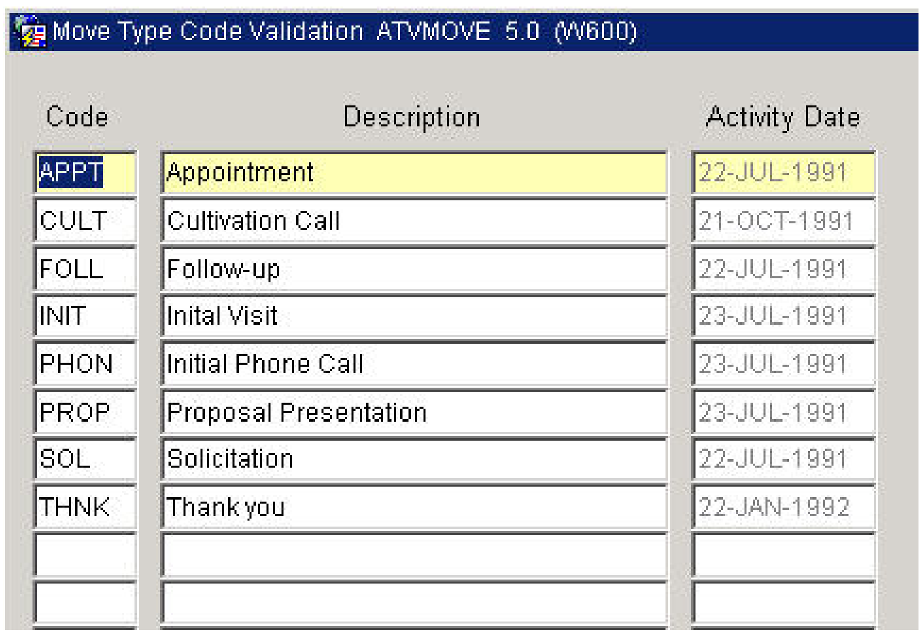
The Move Type Code Validation Form (ATVMOVE) lets you maintain user-defined codes identifying the moves made with a prospect based on certain contacts. Moves management is a prospect strategy to analyze the effectiveness of a solicitation program.

Move codes are assigned or viewed on the following forms:

Prospect Contact Form	AMACONT
Strategy Plan Rule Form	AMASTGY
Prospect Strategy Plan Form	AMAPLAN
Moves by Prospect Form	AMAPROS
Moves by Project Form	AMAPROJ
Moves by Staff Form	AMASTAF

Screen Image

The Move Type Code Validation Form should be accessed and the existing information should be reviewed. Anything pertaining to your institution that needs to be added or deleted can be done so via the **Insert/Delete Record** functions.


Move Type Code Validation ATVMOVE 5.0 (W600)

Code	Description	Activity Date
APPT	Appointment	22-JUL-1991
CULT	Cultivation Call	21-OCT-1991
FOLL	Follow-up	22-JUL-1991
INIT	Inital Visit	23-JUL-1991
PHON	Initial Phone Call	23-JUL-1991
PROP	Proposal Presentation	23-JUL-1991
SOL	Solicitation	22-JUL-1991
THNK	Thank you	22-JAN-1992

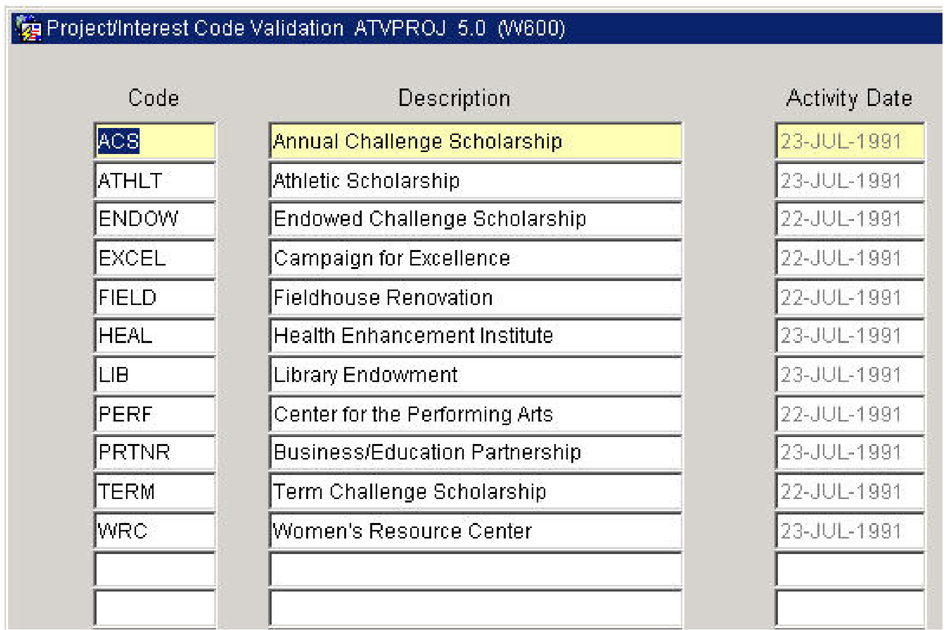
Project/Interest Code Validation Form (ATVPROJ)

Introduction

The Project/Interest Code Validation Form (ATVPROJ) lets you maintain codes for projects or area of interest for a prospect. You can assign the project/interest code to a prospect in the Project/Interest area window on the Prospect Information Form (AMAINFO), or you can assign it when you log a contact with a prospect on the Prospect Contact Form (AMACONT).

Screen Image

The Project/Interest Code Validation Form should be accessed and the existing information should be reviewed. Anything pertaining to your institution that needs to be added or deleted can be done so via the **Insert/Delete Record** functions.


Project/Interest Code Validation ATVPROJ 5.0 (W600)

Code	Description	Activity Date
ACS	Annual Challenge Scholarship	23-JUL-1991
ATHLT	Athletic Scholarship	23-JUL-1991
ENDOW	Endowed Challenge Scholarship	22-JUL-1991
EXCEL	Campaign for Excellence	22-JUL-1991
FIELD	Fieldhouse Renovation	22-JUL-1991
HEAL	Health Enhancement Institute	23-JUL-1991
LIB	Library Endowment	23-JUL-1991
PERF	Center for the Performing Arts	22-JUL-1991
PRTNR	Business/Education Partnership	23-JUL-1991
TERM	Term Challenge Scholarship	22-JUL-1991
WRC	Women's Resource Center	23-JUL-1991

Proposal Code Validation Form (ATVPROP)

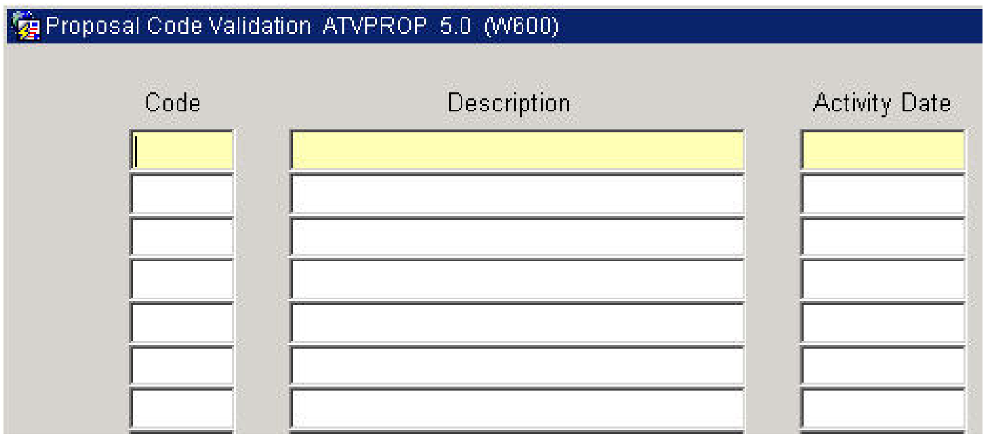
Introduction

Use the Proposal Code Validation Form (ATVPROP) to create and update proposal codes and descriptions. A prospect can have an unlimited number of proposal codes, but each proposal code can be associated with a prospect only once.

The codes you create here are used on the Prospect Information Form (AMAINFO) and the Prospect Proposal Form (AMAPROP).

Screen Image

The Proposal Code Validation Form should be accessed and the existing information should be reviewed. Anything pertaining to your institution that needs to be added or deleted can be done so via the **Insert/Delete Record** functions.



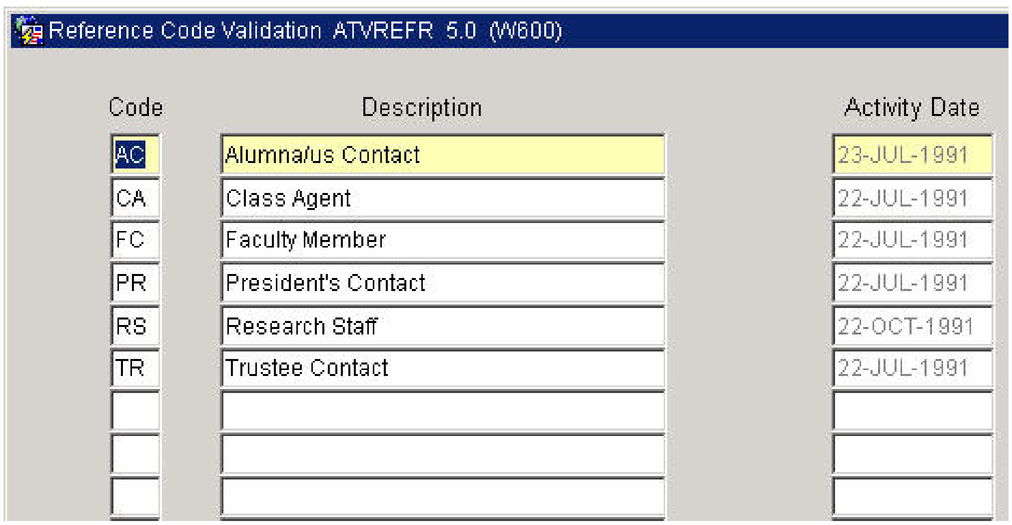
Reference Code Validation Form (ATVREFR)

Introduction

The Reference Code Validation Form (ATVREFR) lets you maintain user-defined codes identifying how constituents/organizations become prospects. A reference code is assigned to a prospect in the General Information on the Prospect Information Form (AMAINFO).

Screen image

The Reference Code Validation Form should be accessed and the existing information should be reviewed. Anything pertaining to your institution that needs to be added or deleted can be done so via the **Insert/Delete Record** functions.



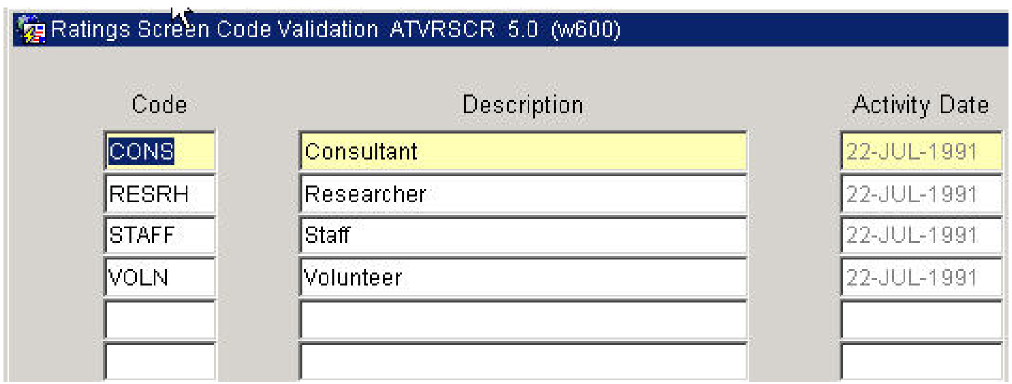
Ratings Screen Code Validation Form (ATVRSCR)

Introduction

Use the Ratings Screen Codes Validation Form (ATVRSCR) to maintain user-defined codes identifying the staff type who performed a rating on a prospect. A code is assigned to each prospect rating in the Ratings window on the Prospect Information form.

Screen Image

The Ratings Screen Code Validation Form should be accessed and the existing information should be reviewed. Anything pertaining to your institution that needs to be added or deleted can be done so via the **Insert/Delete Record** functions.


Ratings Screen Code Validation ATVRSCR 5.0 (w600)

Code	Description	Activity Date
CONS	Consultant	22-JUL-1991
RESRH	Researcher	22-JUL-1991
STAFF	Staff	22-JUL-1991
VOLN	Volunteer	22-JUL-1991

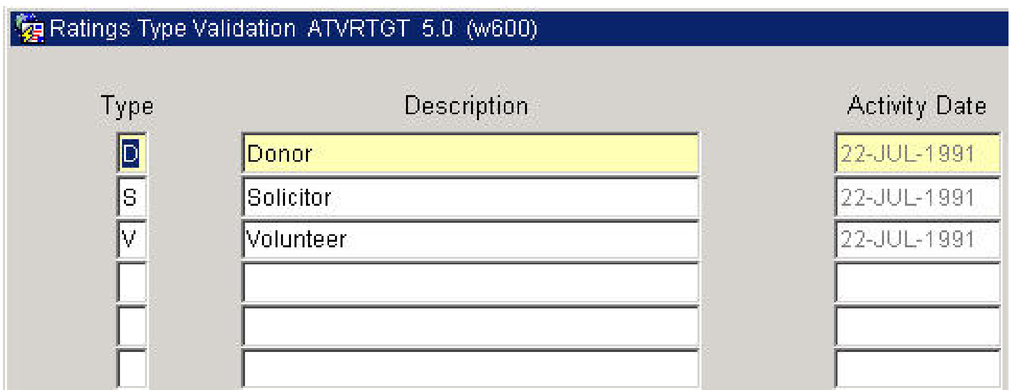
Ratings Type Validation Form (ATVRTGT)

Introduction

Use the Ratings Type Validation Form (ATVRTGT) to maintain user-defined codes identifying the types of ratings a prospect have (e.g. donor, volunteer, class agent). The ratings type code is assigned to a prospect in the Ratings window on the Prospect Information Form (AMAINFO).

Screen Image

The Ratings Type Validation Form should be accessed and the existing information should be reviewed. Anything pertaining to your institution that needs to be added or deleted can be done so via the **Insert/Delete Record** functions.



Solicitor Contact Code Validation Form (ATVSCNT)

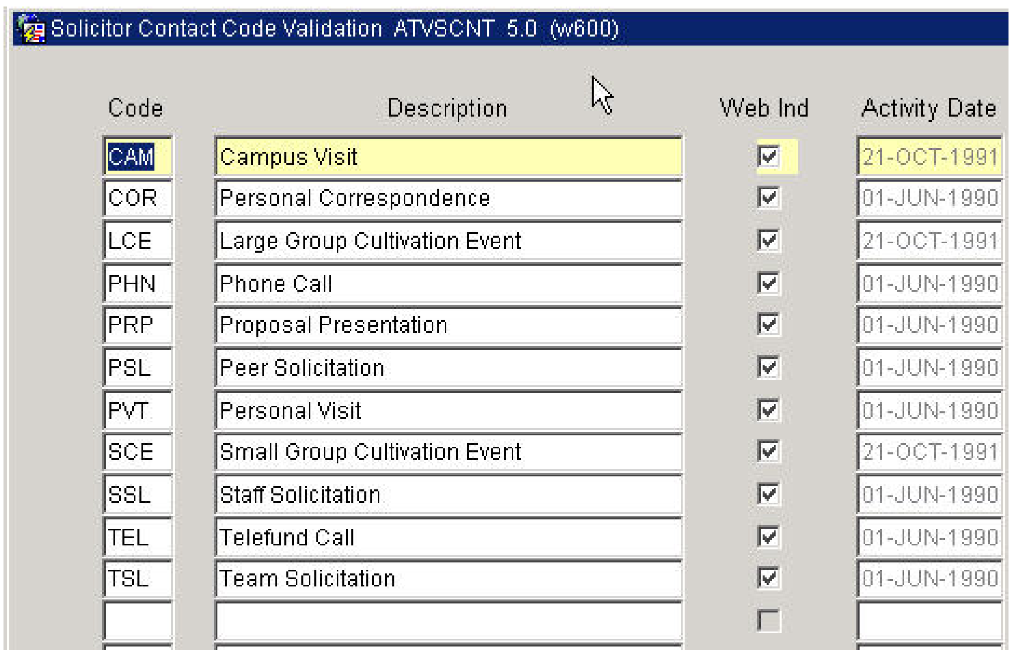
Introduction

The Solicitor Contact Code Validation Form (ATVSCNT) lets an institution define codes and descriptions identifying types of contact a solicitor might have with a constituent in a solicitation appeal. Solicitor contact codes are entered in **Contact** on the Campaign Solicitors Form (AFACSLT). These codes assist in tracing a volunteer's progress with a constituent. Also, a contact code can be assigned to a specific contact with a prospect on the Contact/Action information on the Prospect Contact Form (AMACONT).

If **Web Ind** is selected, the code can be viewed on the web.

Screen Image

The Solicitor Contact Code Validation Form should be accessed and the existing information should be reviewed. Anything pertaining to your institution that needs to be added or deleted can be done so via the **Insert/Delete Record** functions.


Solicitor Contact Code Validation ATVSCNT 5.0 (w600)

Code	Description	Web Ind	Activity Date
CAM	Campus Visit	☑	21-OCT-1991
COR	Personal Correspondence	☑	01-JUN-1990
LCE	Large Group Cultivation Event	☑	21-OCT-1991
PHN	Phone Call	☑	01-JUN-1990
PRP	Proposal Presentation	☑	01-JUN-1990
PSL	Peer Solicitation	☑	01-JUN-1990
PVT	Personal Visit	☑	01-JUN-1990
SCE	Small Group Cultivation Event	☑	21-OCT-1991
SSL	Staff Solicitation	☑	01-JUN-1990
TEL	Telefund Call	☑	01-JUN-1990
TSL	Team Solicitation	☑	01-JUN-1990
		☐	

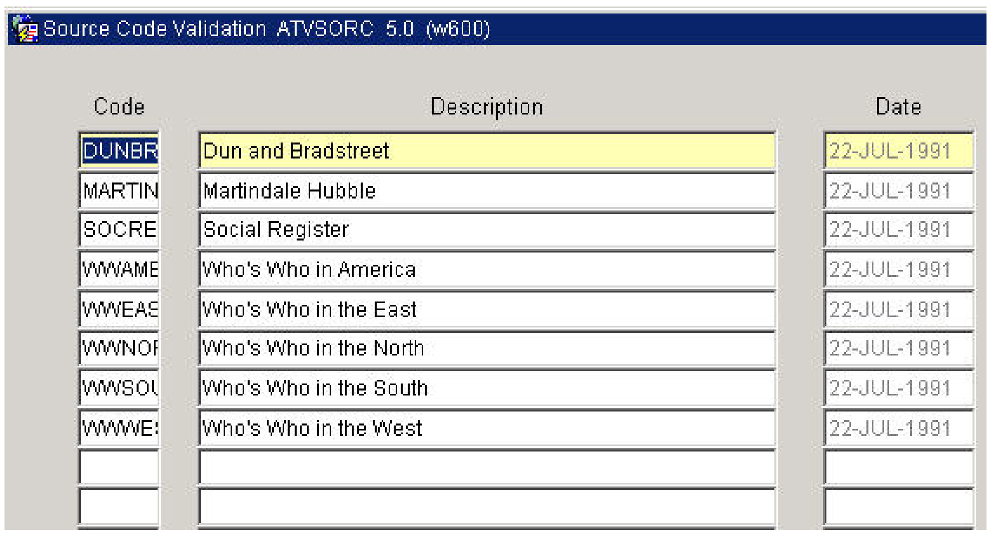
Source Code Validation Form (ATVSORC)

Introduction

Use the Source Code Validation Form (ATVSORC) to maintain user-defined codes identifying the types of sources from which research on a prospet takes place. Source codes can be assigned to a prospect in the Source Information on the Prospect Research Form (AMARSCH).

Screen Image

The Source Code Validation Form form should be accessed and the existing information should be reviewed. Anything pertaining to your institution that needs to be added or deleted can be done so via the **Insert/Delete Record** functions.



Staff Assignment Type Validation Form (ATVSTFT)

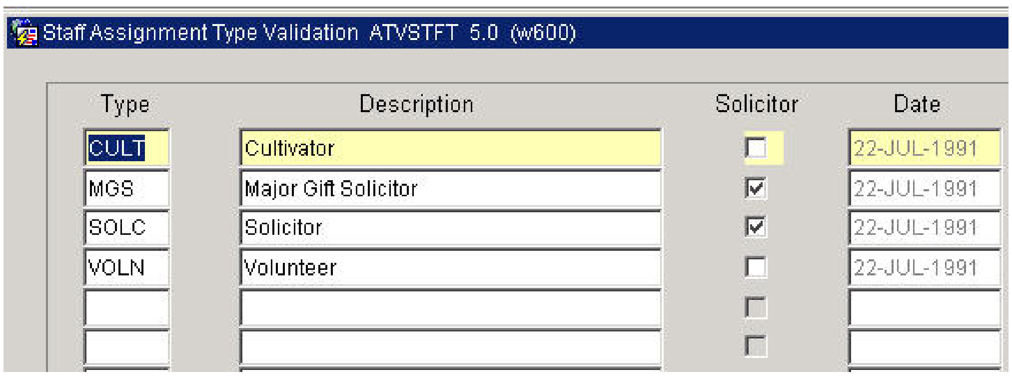
Introduction

Use the Staff Assignment Type Validation Form (ATVSTFT) to maintain user-defined codes identifying the roles a person can have with a prospect (e.g. solicitor, cultivator, researcher, etc.)

The **Solicitor** checkbox identifies whether the person assigned to this assignment needs to have an ID on GUAIDEN. If checked, an ID must be associated with the person assigned to this code.

Screen Image

The Staff Assignment Type Validation Form should be accessed and the existing information should be reviewed. Anything pertaining to your institution that needs to be added or deleted can be done so via the **Insert/Delete Record** functions.



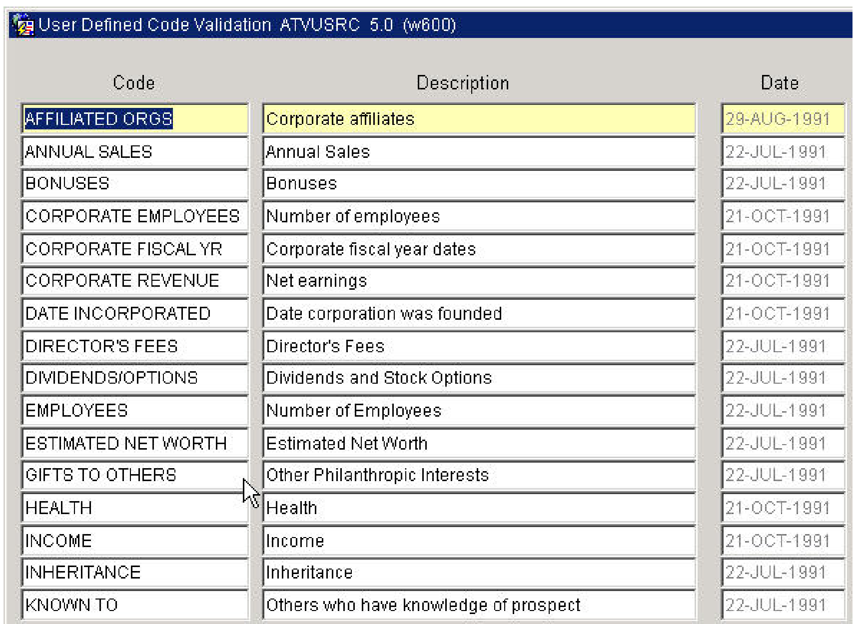
User Defined Codes Validation Form (ATVUSRC)

Introduction

Use the User Defined Codes Validation Form (ATVUSRC) to maintain the codes identifying information that will be acquired about a prospect by research. You can assign user-defined codes to a prospect in the Research Data window on the Prospect Research Form (AMARSCH)

Screen Image

The User Defined Codes Validation Form should be accessed and the existing information should be reviewed. Anything pertaining to your institution that needs to be added or deleted can be done so via the **Insert/Delete Record** functions.


User Defined Code Validation ATVUSRC 5.0 (w600)

Code	Description	Date
AFFILIATED ORGS	Corporate affiliates	29-AUG-1991
ANNUAL SALES	Annual Sales	22-JUL-1991
BONUSES	Bonuses	22-JUL-1991
CORPORATE EMPLOYEES	Number of employees	21-OCT-1991
CORPORATE FISCAL YR	Corporate fiscal year dates	21-OCT-1991
CORPORATE REVENUE	Net earnings	21-OCT-1991
DATE INCORPORATED	Date corporation was founded	21-OCT-1991
DIRECTOR'S FEES	Director's Fees	22-JUL-1991
DIVIDENDS/OPTIONS	Dividends and Stock Options	22-JUL-1991
EMPLOYEES	Number of Employees	22-JUL-1991
ESTIMATED NET WORTH	Estimated Net Worth	22-JUL-1991
GIFTS TO OTHERS	Other Philanthropic Interests	22-JUL-1991
HEALTH	Health	21-OCT-1991
INCOME	Income	21-OCT-1991
INHERITANCE	Inheritance	22-JUL-1991
KNOWN TO	Others who have knowledge of prospect	22-JUL-1991

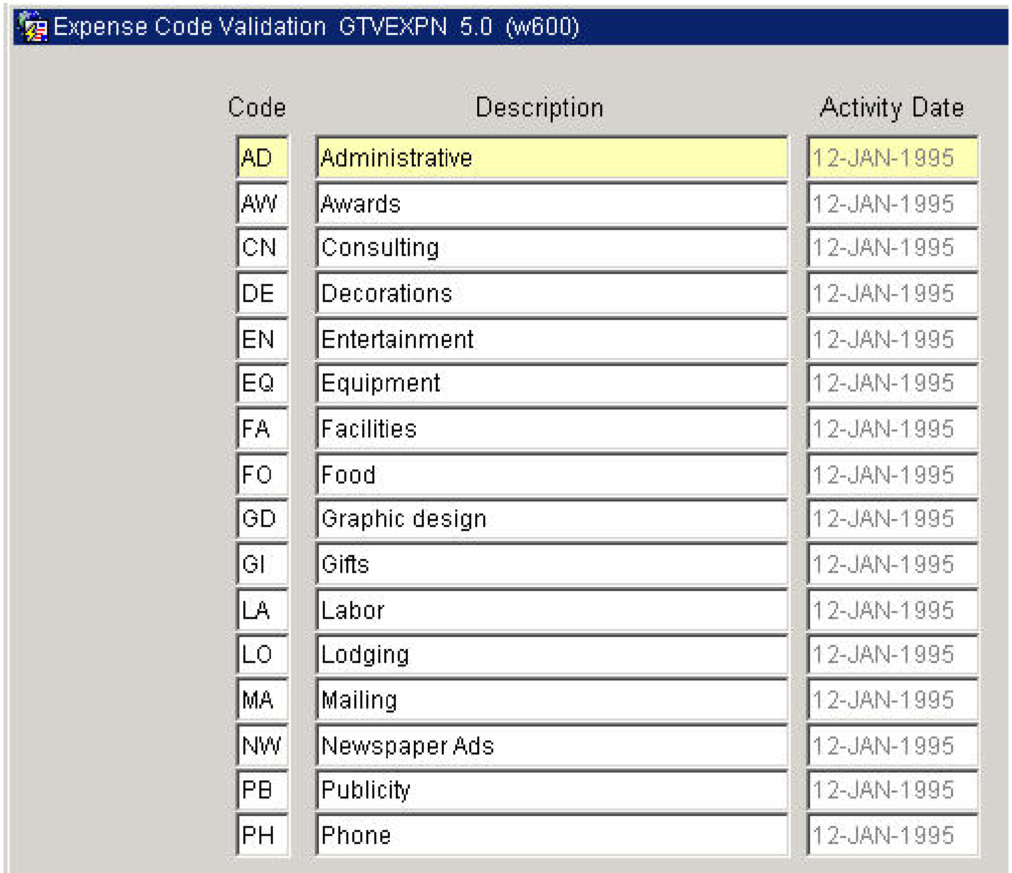
Expense Code Validation Form (GTVEXPN)

Introduction

Use the Expense Code Validation Form (GTVEXPN) to define expense codes for functions, campaigns and prospect contacts. Examples of expenses include consulting, equipment, facilities, and publicity.

Screen Image

The Expense Code Validation Form should be accessed and the existing information should be reviewed. Anything pertaining to your institution that needs to be added or deleted can be done so via the **Insert/Delete Record** functions.



Expense Code Validation GTVEXPN 5.0 (w600)

Code	Description	Activity Date
AD	Administrative	12-JAN-1995
AW	Awards	12-JAN-1995
CN	Consulting	12-JAN-1995
DE	Decorations	12-JAN-1995
EN	Entertainment	12-JAN-1995
EQ	Equipment	12-JAN-1995
FA	Facilities	12-JAN-1995
FO	Food	12-JAN-1995
GD	Graphic design	12-JAN-1995
GI	Gifts	12-JAN-1995
LA	Labor	12-JAN-1995
LO	Lodging	12-JAN-1995
MA	Mailing	12-JAN-1995
NW	Newspaper Ads	12-JAN-1995
PB	Publicity	12-JAN-1995
PH	Phone	12-JAN-1995

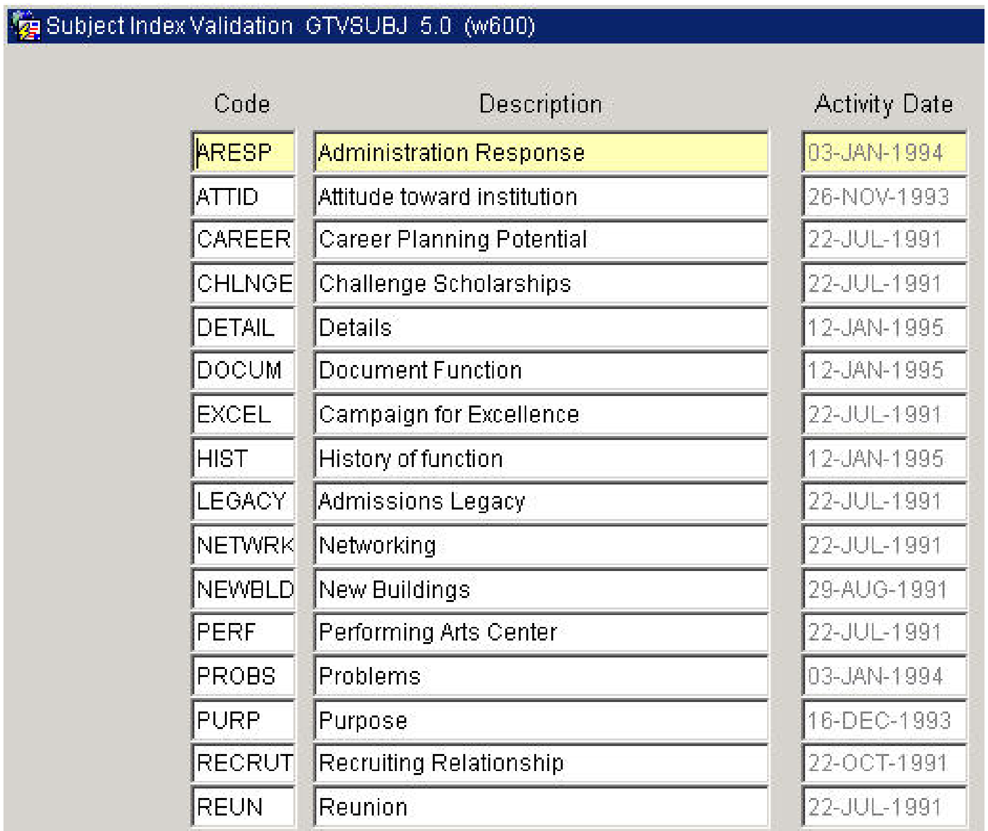
Subject Index Validation Form (GTVSUBJ)

Introduction

Use the Subject Index Validation Form (GTVSUBJ) to define indexes (keywords) that desribe the subject matter of comments for functions, prospects, constituents, and designations.

Screen Image

The Subject Index Validation Form should be accessed and the existing information should be reviewed. Anything pertaining to your institution that needs to be added or deleted can be done so via the **Insert/Delete Record** functions.


Subject Index Validation GTVSUBJ 5.0 (w600)

Code	Description	Activity Date
ARESP	Administration Response	03-JAN-1994
ATTID	Attitude toward institution	26-NOV-1993
CAREER	Career Planning Potential	22-JUL-1991
CHLNGE	Challenge Scholarships	22-JUL-1991
DETAIL	Details	12-JAN-1995
DOCUM	Document Function	12-JAN-1995
EXCEL	Campaign for Excellence	22-JUL-1991
HIST	History of function	12-JAN-1995
LEGACY	Admissions Legacy	22-JUL-1991
NETWRK	Networking	22-JUL-1991
NEWBLD	New Buildings	29-AUG-1991
PERF	Performing Arts Center	22-JUL-1991
PROBS	Problems	03-JAN-1994
PURP	Purpose	16-DEC-1993
RECRUT	Recruiting Relationship	22-OCT-1991
REUN	Reunion	22-JUL-1991

Creating and Viewing Strategy Plans

Introduction

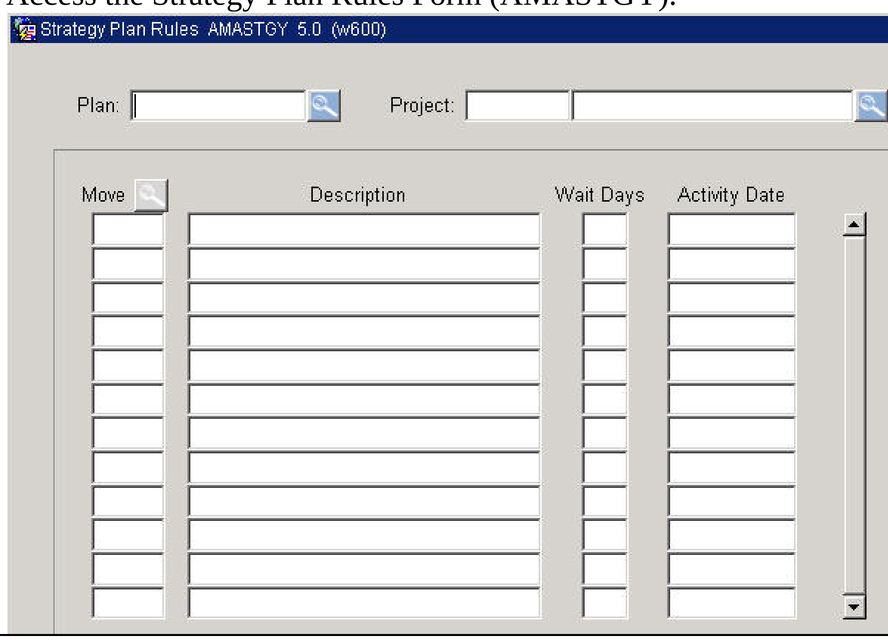
The Strategy Plan Rules Form (AMASTGY) allows you to create a base strategy for the strategy place code and/or project entered on the key information. The strategy developed here for a plan/project combination defaults to the Prospect Strategy Plan Form (AMAPLAN) when a prospect is targeted for a plan/project combination. The plan can be customized for a prospect on AMAPLAN without affecting the strategy plan developed here.

Strategy plans consist of a strategy and an optional project (also referred to as an interest area). A project is required to link a strategy plan to a prospect. At least one project/interest must be linked to the prospect, not necessarily to the strategy. Each strategy/project combination is referred to as a “strategy plan” or just “plan”. There is no one-to-one correspondence between a strategy and a project. This allows a strategy to be associated with any number of plans, a project to be associated with any number of strategies, or a strategy to exist by itself (that is not associated with a project). In the first two cases, each plan’s strategy/project combination is unique; it cannot be altered when it is assigned to a prospect. In the last case, a project must be associated with the plan when it is assigned to a prospect.

Procedure

Follow these steps to complete the form

Step	Action
1	Access the Strategy Plan Rules Form (AMASTGY).



2	For a new plan, use the **Search** functions to review values to make sure your plan does not already exist.

Continued on the next page

Creating and Viewing Strategy Plans, Continued

Procedure, continued

Step	Action
3	Create the new code in the **Plan** field.
4	Link an optional **Project** code
5	Perform a **Next Block** function.
6	Search in the **Move** field and select an appropriate code.
7	Enter the number of **Wait Days**.
8	Enter all the **moves** and **wait days** appropriate for this plan.
9	Select the **Save** function.

Self Check

Directions	Use the information that you have learned in this workbook to complete this self check activity.
Question One	What form lets you maintain user-defined codes that will track the different types of gifts that can be made by a prospect for a specific project or interest?
Question Two	**True / False** A prospect can have an unlimited number of proposal codes, but each proposal code can be associated with a prospect only once.
Question Three	What form do you use to maintain user-defined codes identifying the roles a person can have with a prospect (e.g. solicitor, cultivator, researcher, etc.)?
Question Four	**True / False** The Prospect Strategy Plan Form (AMAPLAN) allows you to create a base strategy for the strategy place code and/or project entered on the key information.

Answer Key

Question One

What form lets you maintain user-defined codes that will track the different types of gifts that can be made by a prospect for a specific project or interest?

Giving Vehicle Code Validation

Question Two

True / False
A prospect can have an unlimited number of proposal codes, but each proposal code cab be associated with a prospect only once.

True

Question Three

What form do you use to maintain user-defined codes identifying the roles a person can have with a prospect (e.g. solicitor, cultivator, researcher, etc.)

Staff Assignment Type Validation (ATVSTFT)

Question Four

True / False
The Prospect Strategy Plan Form (AMAPLAN) allows you to create a base strategy for the strategy place code and/or project entered on the key information.

False – The Strategy Plan Rule Form (AMASTGY) allows you to create a base strategy for the strategy place code and/or project entered on the key information.

Section C: Day-to-Day Operations

Overview

Purpose

The purpose of this section is to explain the day-to-day operational procedures to handle prospect management at your institution.

Intended Audience

Advancement Office staff.

Objectives

At the end of this course, participants will be able to:

- Assign a new prospect into Banner
- Record a contact
- Add prospect comments and research
- Add a prospect proposal
- Assign a strategic plan to a prospect
- View the status of a prospect

Prerequisites

To complete this workbook, you should have completed the SCT Education Practices computer-based training (CBT) tutorial "Banner 6.x Fundamentals: Navigation and Forms," or have equivalent experience navigating in the SCT Banner system.

In this section

These topics are covered in this section.

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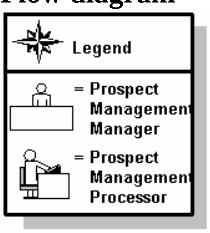
Process Introduction

About the process

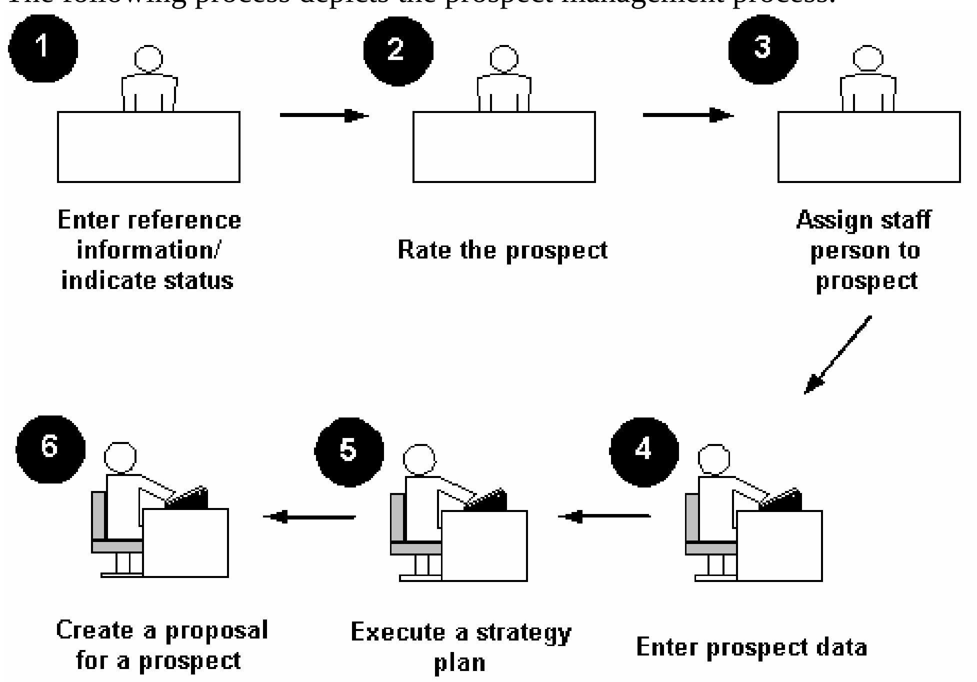
The Advancement Office can:

- Establish, store, and weight prospect ratings from internal and external sources
- Associate prospects with refernce source, ratings, screening processes,s taff members, project/interest areas, and contact and follow-up actions
- View and query prospects by geographic region, class year, ratings, staff assignment, and project/interest areas
- Record contacts with prospects, associating a “move” code with each contact.
- Create online reminder messages for specific contact and follow-up activities.
- Store free-form comments with subject indexes
- Create user defined fields to store prospect research
- Create a strategy plan for a specific project and assign the plan to a prospect
- View moves planned and completed for a prospect, for a project, and by a staff member.

Flow diagram



The following process depicts the prospect management process.



Continued on the next page

Process Introduction, Continued

What happens

The stages of the process are described in this table.

Stage	Description
1	**Enter reference information and indicate status**
	Access prospect information page
	Enter a reference for the prospect
	Indicate prospect status
2	**Rate the prospect**
3	**Assign a staff person to a prospect**
4	**Enter prospect data**
	Indicate prospects project/interest areas
	Enter external ratings
	Add research information
	Enter contact information
	Add comments about a prospect
5	**Execute a strategy plan**
6	**Create a proposal for a prospect**

Making the Constituent a Prospect

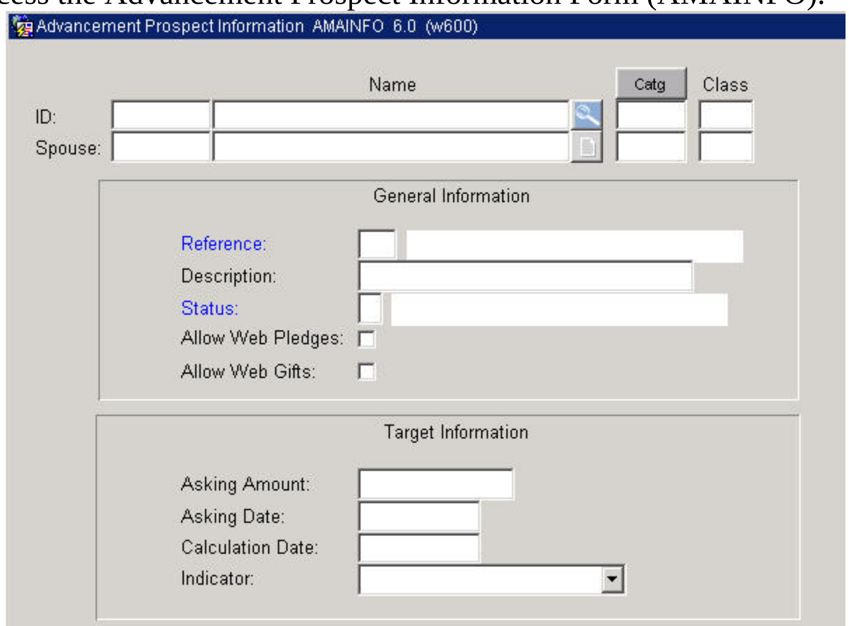
Introduction

The Prospect Information Form is used to create a prospect record for an already established constituent or organization ID. Entering a reference source, rating, and staff assignment for an ID establishes that ID as a prospect.

This form is also used to associate a prospect with screening processes and projects and/or interest areas. It provides storage for any ratings obtained from a commercial prospect rating service. The information contained on the form is used to identify and segment the prospect pool. All of the primary prospect forms may be accessed from the main window.

Procedure

Follow these steps to complete the procedure.

Step	Action
1	Access the Advancement Prospect Information Form (AMAINFO). 
2	Tab to the **Name** field and enter a name in last-name-comma-first-name format. OR Perform a name **Search** to locate the appropriate record.
3	Perform a **Next Block** function.
4	**Reference** is a required field. Double-click in the **Reference** field to access the codes describing the reference source for making this entity a prospect. This is to identify the individual who suggested the constituent be a prospect.
5	Select the correct code and double-click to retrieve it.

Continued on the next page

Making the Constituent a Prospect, Continued

Procedure, continued

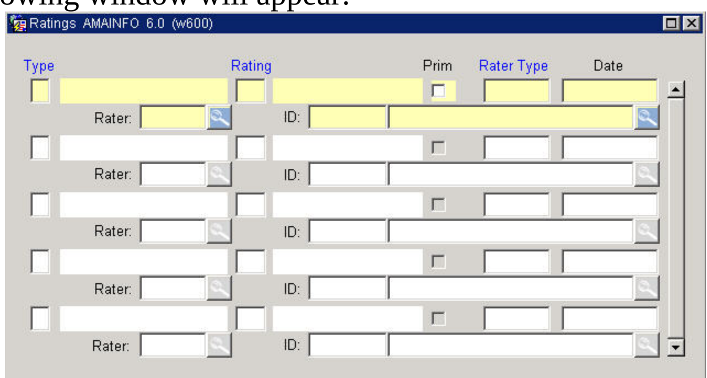
Step	Action
7	Tab to the **Description** field, and enter a free-text explanation of the reason for making this entity a prospect. Note: You may want to enter a date here instead of a name to indicate when this action was completed.
8	The **Prospect Status** code defaults to 'A – Active'. To change this code, double-click in the **Status** field and select a different code by double-clicking on the correct code.
9	If you want to allow the prospect to make on-line pledges through Self-Service Alumni, then click the **Allow Web Pledges** check box. Note: You may not want to allow all prospects to have this option. For example, if you are hoping for a major gift from this prospect, then you would not want to allow them the option to make a much smaller pledge.
10	If you want to allow the prospect to make on-line gifts through Web for Alumni, then click the **Allow Web Gifts** check box. Note: If you do not allow this prospect to make online pledges, they will not be able to make a pledge payment, only a gift online.
11	The **Target Ask Amount** will be calculated based on other data entry.
12	Select the **Save** function.
13	Perform a **Next Block** function.

Making the Constituent a Prospect, Continued

Ratings window

Follow these steps to complete the process.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>While in the form AMAINFO, select Ratings from the Options menu.

</td></tr>
<tr><td>2</td><td>The following window will appear:

</td></tr>
<tr><td>3</td><td>Double-click in the Type field to select the code that describes the type of rating you are recording. This is a required action.</td></tr>
<tr><td>4</td><td>Select the appropriate code and double-click to retrieve it.</td></tr>
<tr><td>5</td><td>Double-click in the Rating field to select the code that rates the prospect in the area identified by the type code.</td></tr>
<tr><td>6</td><td>Select the appropriate code and double-click to retrieve it.</td></tr>
<tr><td>7</td><td>Click on the Primary box if you want to indicate that the rating is the ‘primary’ – or most important/accurate rating for the prospect.</td></tr>
<tr><td>8</td><td>Double-click in the Rater Type field to select a code describing the type of entity doing the rating (e.g. Staff, External Consultant, Board Member, Volunteer)</td></tr>
<tr><td>9</td><td>Select the appropriate code and double-click to retrieve it.</td></tr>
</table>

Continued on the next page

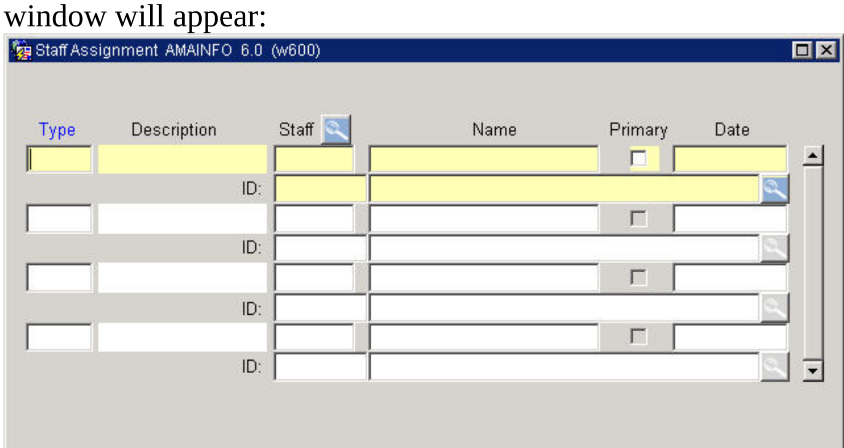
Procedure, continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>10</td><td>Use the Rater or ID fields to record the name of the person responsible for the rating.

<table>
<tr><th>IF</th><th>THEN</th></tr>
<tr><td>The person is a staff member (i.e. a Banner User)</td><td>Use the Rater Search icon to view and select from a list of authorized Banner users.</td></tr>
<tr><td>The person is not an authorized Banner user</td><td>Use the ID search button to select a Banner ID from the</td></tr>
</table>
</td></tr>
<tr><td>11</td><td>Click the Save icon.</td></tr>
<tr><td>12</td><td>Perform a Next Block function.</td></tr>
</table>

Staff assignments window

Follow these steps to complete the procedure.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Once you have performed the Next Block function, the following window will appear:


</td></tr>
<tr><td>2</td><td>Double-click in the Type field to view and select a code that describes the ‘type’ of role that the staff person will play in regards to this prospect (e.g. ‘Prospect Manager, Solicitor, Researcher, Cultivator’).

<u>Note</u>: This is the last piece of required information to make a constituent a prospect.</td></tr>
</table>

Continued on the next page

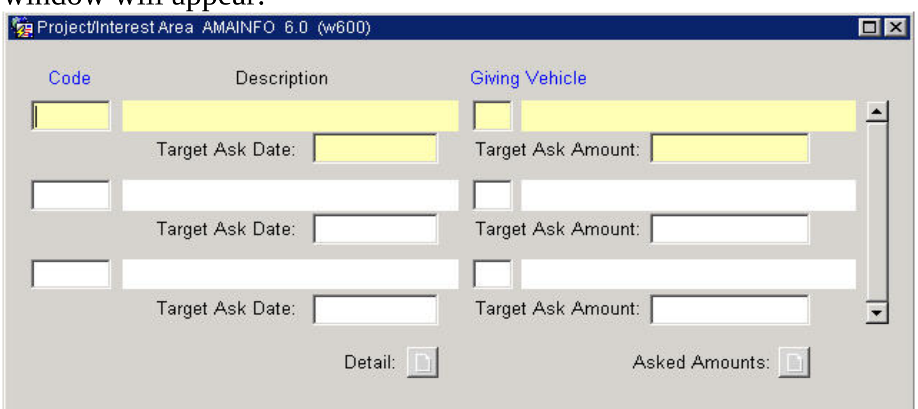
Making the Constituent a Prospect, Continued

Procedure, continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3
.</td><td>Use the Staff or ID fields to record the name of the staff person assigned to the roll selected.
<table>
<tr><th>IF</th><th>THEN</th></tr>
<tr><td>The person is a staff member (i.e. a Banner User)</td><td>Use the Rater search button to view and select from a list of authorized Banner users.</td></tr>
<tr><td>The person is not an authorized Banner user</td><td>Use the ID search button to select a Banner ID from the</td></tr>
</table>
</td></tr>
<tr><td>4</td><td>Click the Save icon.</td></tr>
<tr><td>5</td><td>Perform a Next Block function.</td></tr>
</table>

Project/interests area window

Follow these steps to complete the procedure.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Once you have performed the Next Block function, the following window will appear:

</td></tr>
<tr><td>2</td><td>Double-click in the Code field to view and select a code that describes the projects or interests this prospect should be associated with. If no project or interest has been determined, select a code that indicates this (e.g. ‘None Determined’)</td></tr>
<tr><td>3</td><td>Optionally, add a code to describe a giving vehicle anticipated for this project/interest.</td></tr>
<tr><td>4</td><td>Double-click in the Giving Vehicle button to view and select a code that describes the projects or interests this prospect should be associated with.</td></tr>
<tr><td>5</td><td>Optionally, add a Target Ask Date and Target Ask Amount for the project/interest.</td></tr>
</table>

Continued on the next page

Making the Constituent a Prospect, Continued

Procedure, continued

Step	Action
6	The **Detail** icon allows the user to link more information about the project.
7	The **Asked Amounts** icon allows the user to display a list of all the asked amounts for that Project/Interest Area.
8	Click the **Save** icon.
9	Click the **Exit** icon to return to the Prospect Management window.

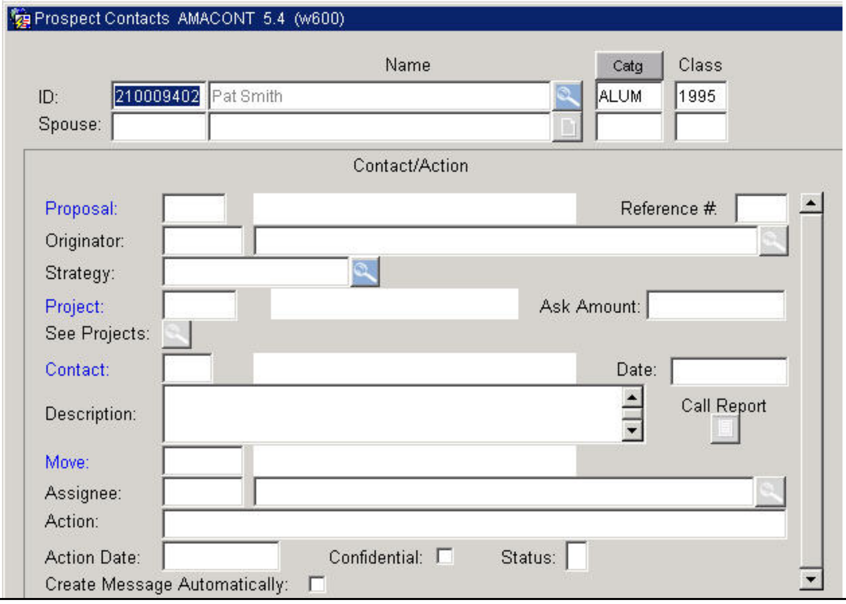
Recording a Contact

Introduction

Contacts are entered in the Banner system using a variety of codes to easily group and report on contact information. Additionally, contacts may serve as the “completion” of a strategic move for the prospect.

Procedure

Follow these steps to complete the procedure.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Access the Prospect Contacts Form (AMACONT).

</td></tr>
<tr><td>2</td><td>Tab to the Name field and enter a name in last-name-comma-first–name format.
OR
Perform a name Search.</td></tr>
<tr><td>3</td><td>Perform a Next Block function.</td></tr>
<tr><td>4</td><td>In the Originator field, enter the initials of the staff person who made this contact. You can view a list of Banner users by double-clicking in the field.</td></tr>
<tr><td>5</td><td>Select the desired person in the list by double-clicking on their record.</td></tr>
<tr><td>6</td><td>Double-click in the Project field.</td></tr>
<tr><td>7</td><td>In the Options dialog box, you may either view a list of existing projects for the prospect by selecting Projects of Prospect List, or view a list of all projects by selecting Project/Interest Areas.</td></tr>
<tr><td>8</td><td>Double-click on the correct project to select it and return to the contact form.</td></tr>
</table>

Continued on the next page

Recording a Contact, Continued

Procedure, continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>9
.</td><td>Navigate to the Ask Amount field.
<table><tr><th>IF</th><th>THEN</th></tr><tr><td>This contact included an actual ask</td><td>enter the amount requested here</td></tr><tr><td>If the contact did not include an ask</td><td>leave this field blank</td></tr></table></td></tr>
<tr><td>10
.</td><td>Before you can add a contact type, you will be asked if you would like to enter information for additional projects.
<table><tr><th>IF</th><th>THEN</th></tr><tr><td>You select “Yes”</td><td>you will be returned to the project field for additional entry</td></tr><tr><td>If you select “No”</td><td>your cursor will move to the Contact field</td></tr></table></td></tr>
<tr><td>11</td><td>Double-click in the Contact field to view and select the appropriate contact code.</td></tr>
<tr><td>12</td><td>Double-click on the correct code to return to the contact form.</td></tr>
<tr><td>13</td><td>Your cursor will move to the Contact Date field.</td></tr>
<tr><td>14</td><td>The current date defaults but can be over-written.</td></tr>
<tr><td>15</td><td>In the Description field, you may enter a description of the contact. Additional text may be entered by clicking the Call Report icon.</td></tr>
<tr><td>16</td><td>To exit the call report, click on the X in the title bar</td></tr>
<tr><td>17</td><td>If this contact met the requirements of a strategic move for the prospect, double-click in the Move field to view a list of move codes.</td></tr>
<tr><td>18</td><td>Select the appropriate move code by double-clicking on the row.</td></tr>
<tr><td>19</td><td>The Assignee field identifies the person responsible for any follow-up action. The field defaults to the contact originator, but can be changed.</td></tr>
<tr><td>20</td><td>In the Action field, describe any follow-up action the assignee needs to do. This text will become a message to the assignee, as well as information stored with the contact.</td></tr>
<tr><td>21</td><td>In the Action Date field, enter the date on which the assignee should receive the message.</td></tr>
</table>

Continued on the next page

Recording a Contact, Continued

Procedure, continued

Step	Action
22	Click on the **Create Message Automatically** field to have the system create a message/tickler, which will be posted to the assignee on the date specified. Note: You may also optionally mark the message Confidential.
23	Click the **Save** icon.
24	Click the **Exit** icon.

Adding a Prospect Comment and Research

Introduction

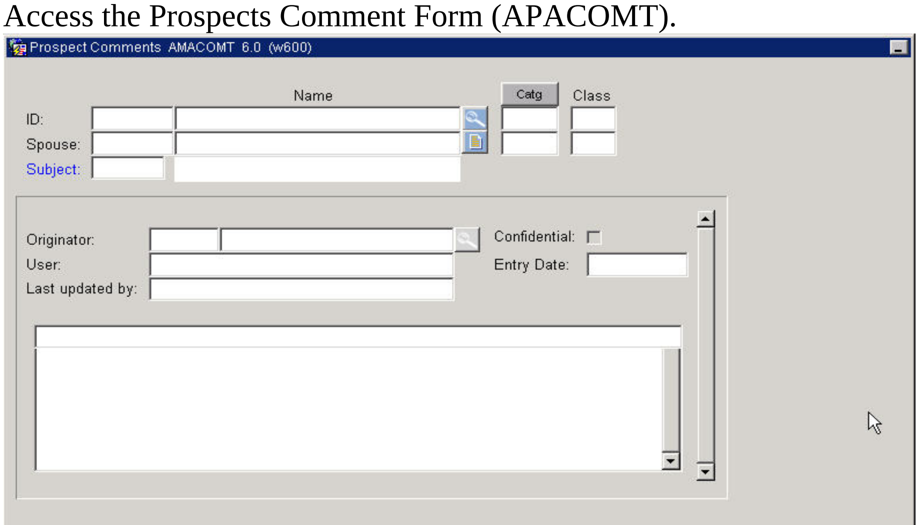
The Prospect Comment Form allows you to enter and organize comments about the prospect. Prospect research data can be entered and viewed on this form. Before using this form, a prospect record must be created on AMAINFO (previous process).

The Prospect Comment Form lets you enter comments about prospect activity. It:

- Identifies if the user is a Prospect Comment Supervisor (defined on AGACTRL). Supervisors have red User Status: Supervisor indicator
- Allows only the originator and the Supervisor to read a comment if it has been marked Confidential
- Identifies the last user who updated the form Comment or Subject
- Automatically wraps text as you type it. You can also cut and paste text from another document.
- Lets you use keywords to search for comments. Each comment can have an unlimited number of keywords.
- Provides access to the prospect's plan (AMAPLAN) (which is discussed later in this module)

Procedure

Follow these steps to complete the form.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Access the Prospects Comment Form (APACOMT).

</td></tr>
<tr><td>2</td><td>In the Name field, do one of the following:
Enter a name in last-name-comma-first-name format
Perform a name search
Double-click in the Subject field to view and select a specific subject to filter the results</td></tr>
</table>

Continued on the next page

Adding a Prospect Comment and Research, Continued

Procedure, continued

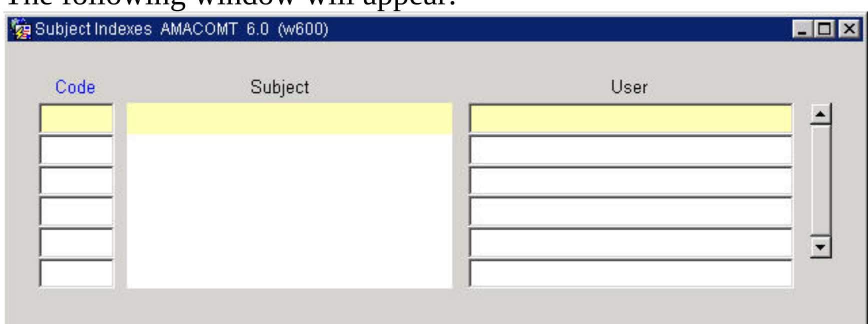
Step	Action
3	Perform a **Next Block** function.
4	In the **Originator** field, enter the initials of the person adding the comment. Note: You can view a list of Banner users by double-clicking in the field. Select the desired person in the list by double-clicking on their record.
5	In the **Confidential Flag** field, indicate if the comment is confidential.
6	In the **Entry Date** field, you may update the date of the comment entry. The current date defaults but can be over-written.
7	Click in the **Comment** text area to enter your comment.
8	Click the **Save** icon.

Continued on the next page

Adding a Prospect Comment and Research, Continued

To index a commet

Follow these steps to complete the form.

Step	Action
1	Click <u>Subject/Index</u> in the **Options** menu. 
2	The following window will appear: 
3	A comment can be cross-indexed to multiple subject codes
4	Double-click in the **Subject Code** field to view and select the appropriate code for this comment.
5	Click the **Save** icon.
6	Click the **Exit** icon.

Link a Prospect with a Proposal

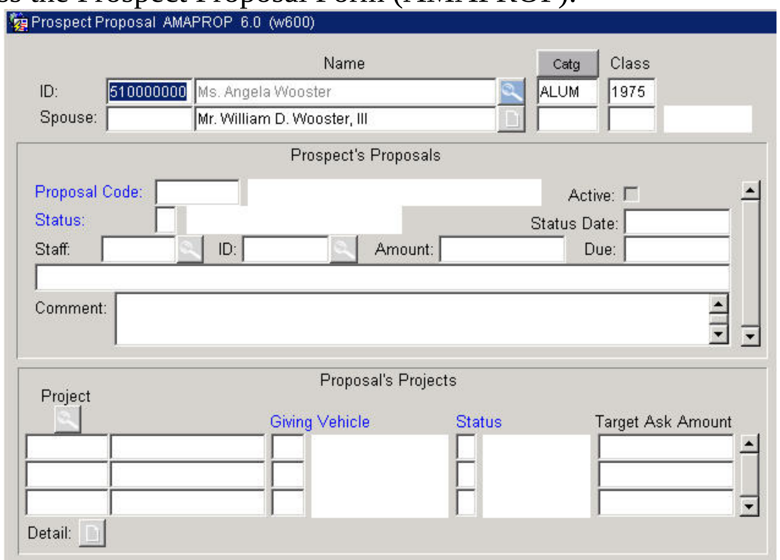
Introduction

The Prospect Proposal Form (AMAPROP) enables you to assign and track proposals for prospect, then associate each proposal with projects.

For each proposal assigned to a prospect, an unlimited number of projects can be identified, but only four active projects for the proposal are allowed.

Procedure

Follow these steps to complete the procedure.

Step	Action
1	Access the Prospect Proposal Form (AMAPROP).  Note: Proposal codes can be generic and used for various prospects, or you may want to create individual proposals for top prospects.
2	Double-click on the **Proposal Code** field and select the appropriate value.
3	Double-click in the **Status** field and select the appropriate status. Note: The status code describes the status of the entire proposal. Additional status codes are available to describe the status of individual components.
4	In the **Status Date** field, enter the date that the status was entered or changed. (This field defaults to the current date, but can be over-written.)

Continued on the next page

Link a Prospect with a Proposal, Continued

Procedure, continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>Use the Staff or ID fields to record the name of the staff person assigned to track this proposal.
<table>
<tr><th>IF</th><th>THEN</th></tr>
<tr><td>The person is a staff member (i.e. a Banner User)</td><td>Use the Staff field's Search icon to view and select from a list of authorized Banner users.</td></tr>
<tr><td>The person is not an authorized Banner user</td><td>Use the ID field's Search icon to select a Banner ID from the system.</td></tr>
</table></td></tr>
<tr><td>6</td><td>In the Amount field, enter the total amount of the proposal.</td></tr>
<tr><td>7</td><td>In the Due field, enter the date that the proposal is due to be completed.</td></tr>
<tr><td>8</td><td>In the Comment field, enter any comments regarding the overall proposal.

<u>Note</u>: The comment field is 10,000 characters long. You can “copy and paste” from other applications into this area.</td></tr>
<tr><td>9</td><td>Click the Save icon.</td></tr>
<tr><td>10</td><td>Perform a Next Block function.</td></tr>
<tr><td>11</td><td>In the Project field, click the Search icon. A dialog box appears.</td></tr>
<tr><td>12</td><td>You may access a list of projects already defined for the prospect, or a complete list of all project/interest codes.</td></tr>
<tr><td>13</td><td>If you select a code from the Projects of Prospect List, any detail from AMAINFO will be automatically entered here, but can be modified.</td></tr>
<tr><td>14</td><td>Add additional projects via performing an Insert Record function.

<u>Note</u>: All proposals MUST be associated with at least one project. If you select a project that is not already assigned to the prospect, the system will ask if you wish to add the project to the prospect's Project Interest List on AMAINFO. Select “Yes” to add it to AMAINFO, “No” to add it to the proposal and NOT to the prospects interest list.</td></tr>
<tr><td>15</td><td>Additional information can be entered for each project component of the proposal. Click the Detail icon to add Project Start Date, Project End Date, Target Ask Amount and Target Ask Date.</td></tr>
<tr><td>16</td><td>When all project components are added, click the Save icon.</td></tr>
<tr><td>17</td><td>Click the Exit icon.</td></tr>
</table>

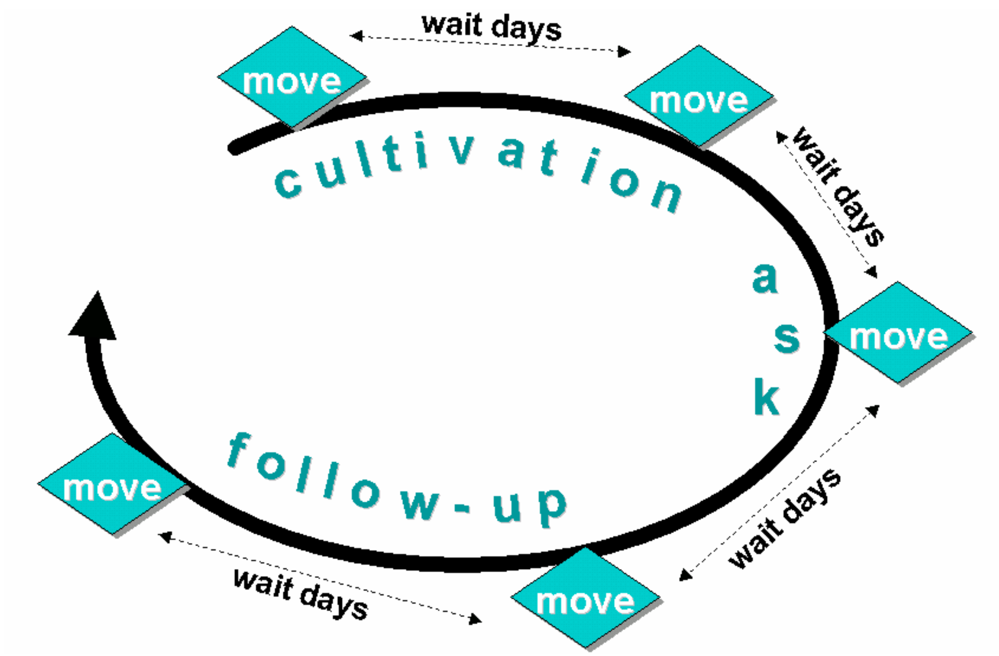
Strategy Plans

Introduction

Strategy Plans consist of moves and wait days between moves, providing consistent cultivation or solicitation plans for a project or group of prospects. Strategy plans can be general, or apply to a specific project only.

Strategic Planning ("Moves Management") provides a pro-active way to lead a prospect through the various fund raising stages to a successful conclusion. The Banner system includes the ability to plan activities on specific days or after a defined "wait period". Banner messaging is used as a "tickler" file system to remind development officers of up-coming moves.

Diagram



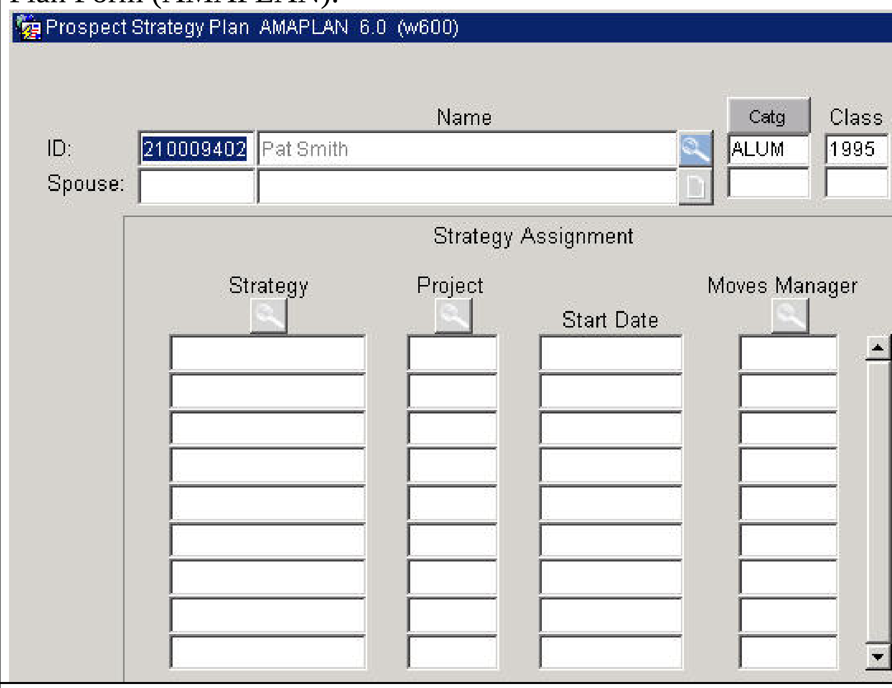
Continued on the next page

Associate a strategy with a prospect

The Prospect Strategy Plan Form (AMAPLAN) allows you to associate a strategy, project, and moves manager to a prospect, view an already-assigned strategy, or create a strategy. A strategy plan may be modified to suit a prospect via this form. Any modifications made here affect the strategy plan only as it applies to the ID in the key information; the strategy plan will not be affected for the rules as defined on the Strategy Plan Rule Form or for any other prospect assigned this strategy plan.

Procedure

Follow these steps to complete the procedure.

Step	Action
1	To associate a strategy with a prospect, access the Prospect Strategy Plan Form (AMAPLAN). 
2	Click the **Search** icon to select the appropriate strategic plan. If the plan is pre-associated with a project, the prospect MUST have that project assigned to them on AMAINFO in order to proceed. <u>Note</u>: Strategic Plans are pre-defined on AMASTGY. When a plan is selected, any predefined moves are automatically assigned. These moves can be modified, added to or deleted, according to the individual circumstances of the prospect.

Continued on the next page

Strategy Plans, Continued

Procedure, continued

Step	Action
3	If the predefined Strategy Plan has not been associated with a project, click the **Search** icon to view a list of projects assigned to the prospect. <u>Note</u>: The prospect must have that project assigned to them on AMAINFO in order to create a strategic plan.
4	In the **Start Date** field, enter the date that will be used to calculate all move dates within the plan. (The current date defaults)
5	In the **Moves Manager** field, enter the initials of the staff person responsible for managing this prospect's plan.
6	Click **Search** to view a list of staff people assigned to the prospect.
7	Click the **Save** icon.
8	Select <u>Plan</u> from the **Options** menu. <u>Note</u>: The prospect must have that staff person assigned to them on AMAINFO in order to create a strategic plan.
9	Click the **Save** icon.
10	The preassigned moves, wait days and dates (calculated from the start date on the previous block) appear. You may accept the plan, or modify it. • To delete a move, click in the appropriate row and perform a **Remove Record** function. • To change the wait days between moves (and all subsequent dates), change the wait days in the appropriate row, and then select <u>Reschedule Dates</u> from the **Options** menu. • To change the date of a particular move WITHOUT changing subsequent dates, update the **Planned Date** field and click **Save**. • To add moves, perform an **Insert Record** function, and then double-click on the **Move** field to view and select a move code. Add a wait days value or a specific date.
11	To send a reminder message to the person assigned as Moves Manager, enter a message in the **Message** field, click the **Message** indicator, and add the date the message should be posted to the **Message/Date** field.
12	Click the **Save** icon.

Continued on the next page

Strategy Plans, Continued

Procedure, continued

Step	Action
13	Repeat this procedure until all moves have the message desired. Note: When sending a message, be sure to anticipate the amount of time needed to prepare for the move before creating a date. The date you enter will be the date that the message is sent to the moves manager via the Banner message form GUAMESG.
14	Click the **Save** icon.
15	Click the **Exit** icon.

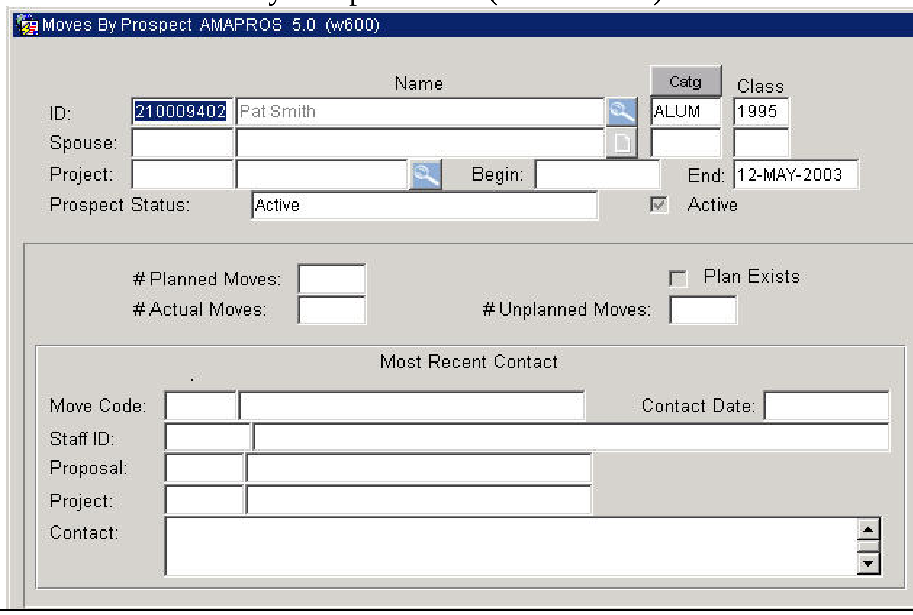
Viewing the Status of a Prospect

Moves by Prospect Form

The Moves By Prospect Form is a query-only form that allows you to view the status within a date range of any prospect for a specific project for all projects.

Procedure

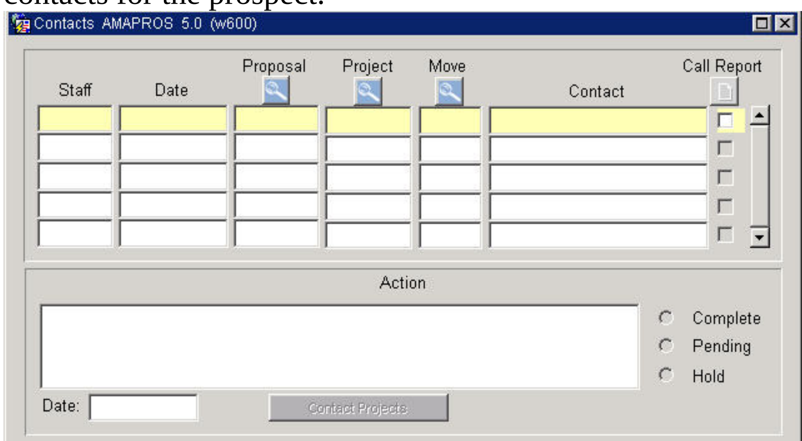
This form shows the number of moves, unplanned moves and the most recent moves.

Step	Action
1	Access the Moves By Prospect Form (AMAPROS). 
2	In the Key block, you may optionally enter a project/interest code, a start date and an end date range. These codes will affect what information you view on the form.
3	To select a project code, click the **Search** icon. You may view a list of existing projects for the prospect, or a list of all project interest codes. (Leave this field blank to view all project information).
4	Optionally enter a **Begin** date, or change the default **End** date (the current date).
5	Perform a **Next Block** function. <u>Note</u>: The information viewed in this form is dependent on the parameters set by the Project, Begin Date and End Date in the key block. The End date defaults to the current date. If this is not changed, only those moves scheduled before or on the current date will be displayed. To view future moves, be sure to reset the End date to a date which will include future moves.

Continued on the next page

Viewing the Status of a Prospect, Continued

Procedure, continued

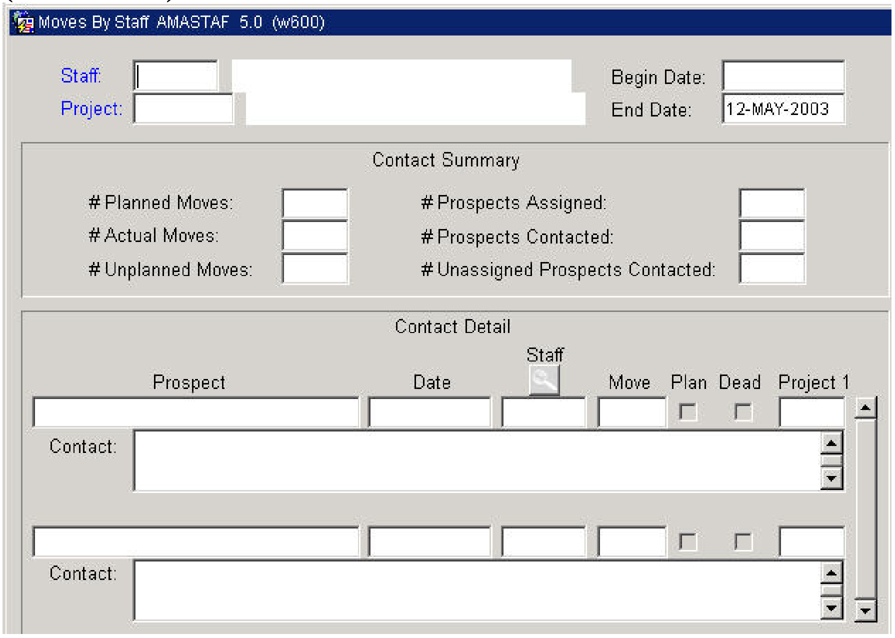
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6</td><td>In the first block, move information is displayed. Fields indicate if a strategic plan exists for the prospect/project combination, how many planned moves there are within the date range, how many have been completed (i.e. a contact report with that move code has been created), and how many unplanned moves have been made (i.e. a contact with a move code NOT in the plan has been created)</td></tr>
<tr><td>7</td><td>In the second block, summary information about the most recent contact is displayed.</td></tr>
<tr><td>8</td><td>Perform a Next Block function to view a summary history of all contacts for the prospect.

</td></tr>
<tr><td>9</td><td>This is a query form, which means that information defaults to this form once contacts and moves are recorded.</td></tr>
</table>

Continued on the next page

Viewing the Status of a Prospect, Continued

Procedure, continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>10</td><td>To view moves by Staff, access the Moves By Staff Form (AMASTAF).

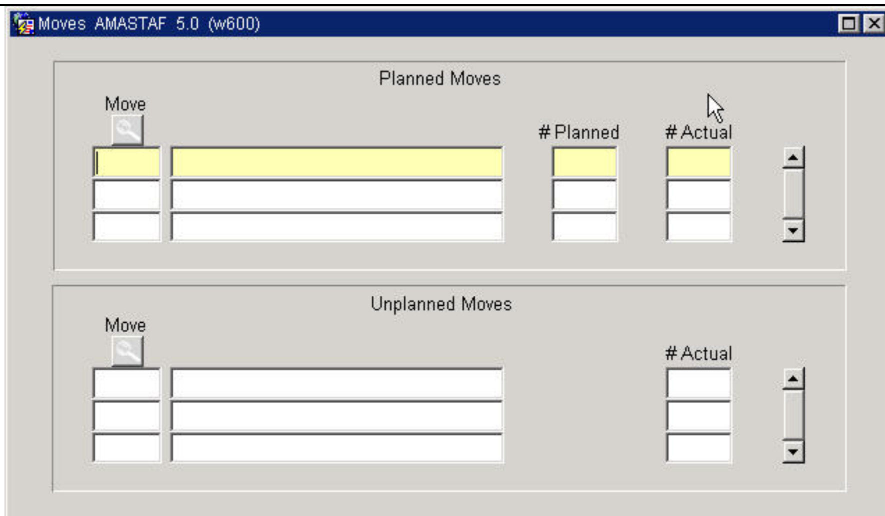


<u>Note</u>: The end date defaults to the current date, but can be changed to a future date and the data will be displayed accordingly.</td></tr>
</table>

Continued on the next page

Viewing the Status of a Prospect, Continued

Procedure, continued

Step	Action
11	Perform a **Next Block** function.
12	
13	This is a query form, which means that information defaults to this form once contacts and moves are recorded.

Continued on the next page

Viewing the Status of a Prospect, Continued

Query Forms

Follow these steps to complete the process.

Step	Action
1	The Strategy Plan List Form (AMCSTGY) displays current strategy plans and associated projects.
2	Moves By Prospect (AMAPROS) shows the number of planned moves, unplanned moves and the most recent moves. Note: In this example, the time of the first planned move is still in the future, so the counts show zero. Note: When you first enter this form, the **End** date defaults to the current date. You can change this date (to a future month or even a future year) and information will be displayed accordingly.
3	Perform a **Next Block** function to view the other information.
4	Navigate to the Moves by Project (AMAPROJ) form.
5	Perform a **Next Block** function to view information. <u>Note</u>: The **End** date defaults to the current date, but can be changed.
6	Perform a **Next Block** function to view more information.
7	Navigate to the Moves By Staff (AMASTAF) form. <u>Note</u>: The **End** date defaults to the current date, but can be changed to a future month or future year. Data will be displayed accordingly.
8	Perform a **Next Block** function to view more information.

Develop a Research Profile for a Prospect

Introduction

The Prospect Research Form (AMARSCH) collects prospect research data that supplements the biographical data stored in the Constituent and Organization modules. It can be accessed directly from the Advancement Prospect Information Form (AMAINFO). The Constituent Summary Form (APASBIO) and the Organization Header Form (AOAORGN) can be accessed directly from anywhere within this form by performing a **Duplicate Record** function (for persons and non-persons).

Procedure

Follow these steps to complete the form.

Step	Action
1	To store research information about the prospect, access the Prospect Research Form (AMARSCH).
2	Perform a **Next Block** function, then search in the **Researcher** field to find the desired researcher on GUAIDEN.
3	Perform a **Next Block** function, then search in the **Source** field to find the appropriate source information. Note: This is a bibliography of sources, and does not link directly to the data entered in the next block.
4	Perform a **Next Block** function, then search in the **Data** field to find the appropriate value to categorize the data being entered.
5	The **As Of** date will default to the current date, but may be overtyped.
6	The **Activity** date is system generated.
7	Enter the **Data** manually, or copy-and-paste information from other sources (such as a Word document or from an Internet source).
8	Click the **Save** icon.
9	If additional information is to be entered, perform a **Rollback** function and repeat this process.
10	Click the **Save** icon after entering your additional information.
11	Click the **Exit** icon.

Continued on the next page

Develop a Research Profile for a Prospect, Continued

Procedure, continued

Step	Action
12	Perform a **Next Block** function.
13	A message box will appear indicating that the projects already assigned will be displayed.
14	Click the **Save** icon.
15	Click the **Exit** icon.

Additional information

It is important to note that the blocks of this form do not roll concurrently. (In fact, the researchers default in alphabetical order.) For this reason, in the data block, the researcher and source should be included in parentheses.

Creating Messages From Prospect Contacts

Message Overview

You can create messages on AMACONT and GUAMESG. Once the messages are created, you can edit them on either form; however, changes do not display on the non-edited-message form. Messages display for the recipient on the appropriate date. Messages can also be made confidential.

Procedures

Follow the steps to complete the form.

Step	Action
1	Access the Prospect Contact Form (AMACONT).
2	If you want to add an **Action**, enter a description.
3	Add an **Action Date**.
4	Select the **Create Message Automatically** check box.
5	Save your data. This should call up the General Message Form (GUAMESG).
6	On GUAMESG, search in the **Recipient** field for the appropriate recipient.
7	The **Sender** will default. Note: The recipient can be the same as the sender.
8	Enter the **Date** on which the message should be delivered. Note: This may be a date in the future.
9	Enter the **Message**.
10	To help the recipient, search in the **Ref ID** field for the prospect's record to link to this message.
11	In the **System** field, enter *A* (*Alumni*).
12	Click the **Save** icon.
13	When the recipient receives the message, they can select the **Complete** radio button to remove it from their messages.

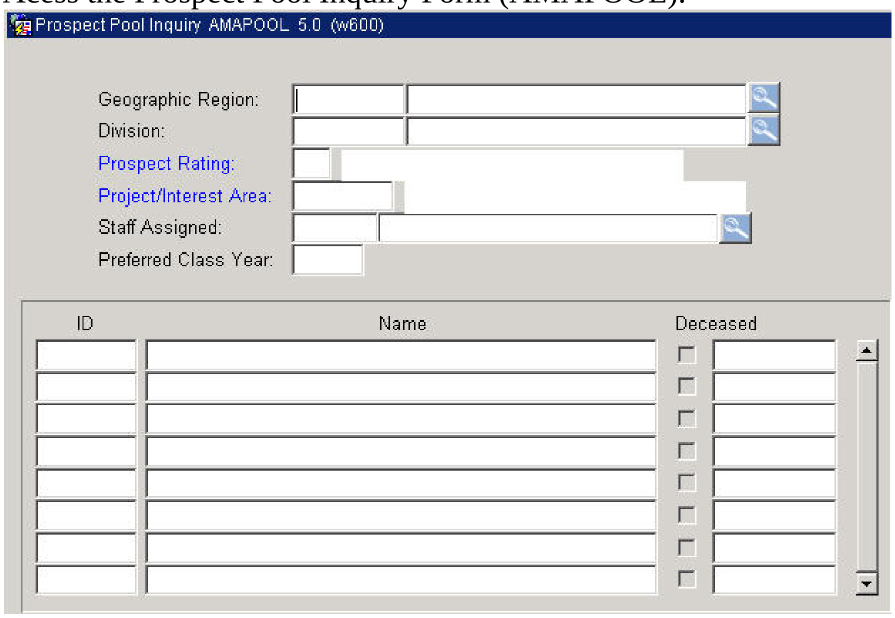
Query a Pool of Prospects

Introduction

The Prospect Pool Inquiry Form (AMAPOOL) enables you to view a group of prospects online. You can enter any combination of five key selection criteria: geographic region, prospect rating, project/interest area, staff member assigned and prospect preferred class year. Prospects meeting the criteria are displayed.

Procedure

Follow these steps to complete form.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Acess the Prospect Pool Inquiry Form (AMAPOOL).


This form allows you to view various kinds of information by selecting the criteria you want in the first block.</td></tr>
<tr><td>2</td><td>Enter your criteria, such as Staff Assigned, to see a list of prospects assigned to a specific staff member.</td></tr>
<tr><td>3</td><td>Perform a Next Block function to view the results of your query.</td></tr>
<tr><td>4</td><td>Perform a Rollback and modify the criteria, then perform a Next Block function to view the new results.</td></tr>
</table>

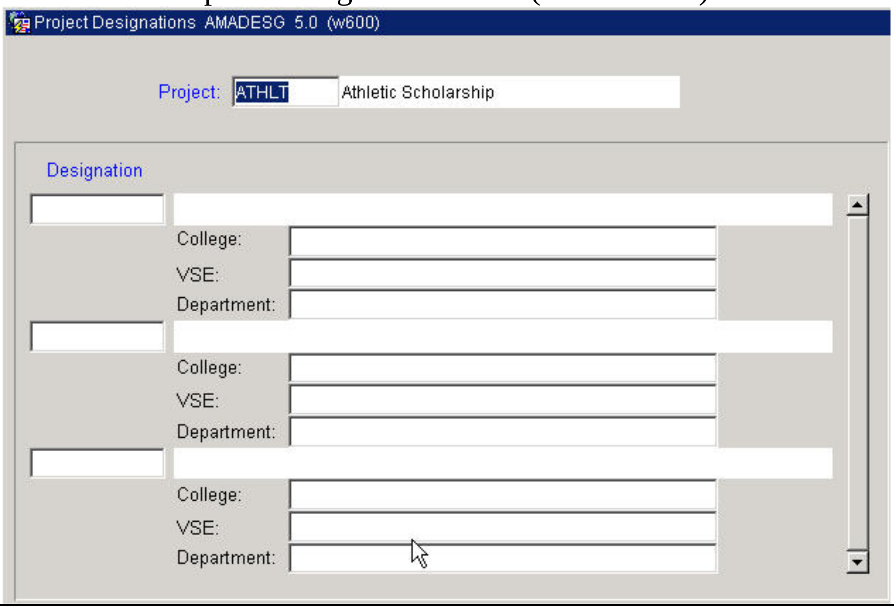
Linking a Project with Designations

Introduction

The Projects Designations Form enables you to assign multiple designations to a project.

Procedure

Follow these steps to complete the form.

Step	Action
1	Access the Prospects Designations Form (AMADESG). 
2	Double-click on the **Designation** field and select the appropriate value.
3	Repeat the process to link additional designations.
4	Click the **Save** icon.
5	Once a project has been linked, it will appear when that designation is displayed on the Designation Form (ADADESG).

Self Check

Directions	Use the information that you have learned in this workbook to complete this self check activity.
Question one	What form is used to create a prospect record for an already established constituent or organization ID?
Question two	**True/False** Contacts are entered on the Banner system using a variety of codes to easily group and report on contact information.
Question three	Prospect research data can be entered and viewed on what form?
Question four	**True/False** The Prospect Proposal Form (AMAPROP) enables you to assign and track proposals for a prospect, then associate each proposal with projects.
Question five	What consists of moves and wait days between moves, and provide constituent cultivation or solicitation plans for a project orgroup of prospects?
Question six	What form allows you to associate a strategy, project, and moves manager to a prospect, view an already-assigned strategy, or create a strategy?
Question seven	**True / False** The Moves By Prospect Form is a rule form that allows you to view the status within a date range of any prospect for a specific project for all projects.
Question eight	What form collects prospect research data that supplements the biographical data stored in the Constituent and Organization modules?

Answer Key

Question one	What form is used to create a prospect record for an already established constituent or organization ID? **Prospect Information Form (AMAINFO)**
Question two	**True/False** Contacts are entered on the Banner system using a variety of codes to easily group and report on contact information. **True**
Question three	Prospect research data can be entered and viewed on what form? **Prospect Comment Form (AMACOMT)**
Question four	**True/False** The Prospect Proposal Form (AMAPROP) enables you to assign and track proposals for a prospect, then associate each proposal with projects. **True**
Question five	What consists of moves and wait days between moves, and provide constituent cultivation or solicitation plans for a project orgroup of prospects? **A Strategy Plan**
Question six	What form allows you to associate a strategy, project, and moves manager to a prospect, view an already-assigned strategy, or create a strategy? **Prospect Strategy Plan Form (AMAPLAN)**

Continued on the next page

Question seven

True / False
The Moves by Prospect Form is a rule form that allows you to view the status within a date range of any prospect for a specific project for all projects.

False. The Moves by Prospect Form is a query only form that allows you to view the status within a date range of any prospect for a specific project for all projects.

Question eight

What form collects prospect research data that supplements the biographical data stored in the Constituent and Organization modules?

Prospect Research Form (AMARSCH)