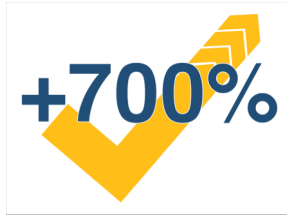


3 POWERFUL WAYS TO USE OUR DASHBOARD

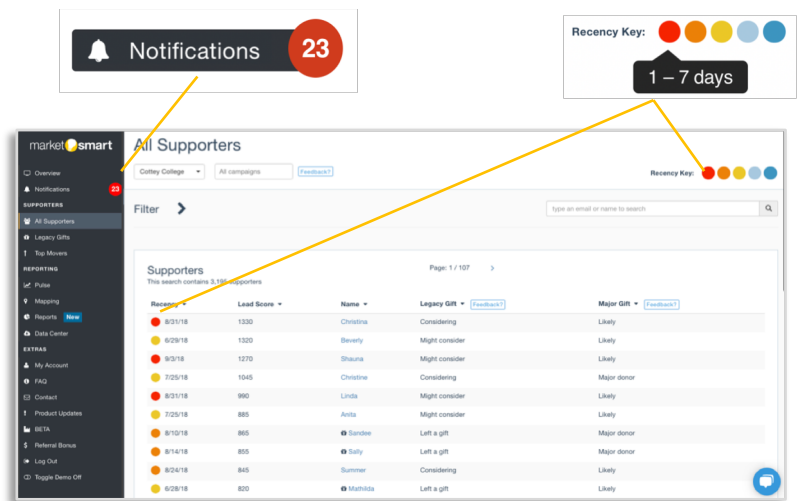
1 Lead generation review

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.

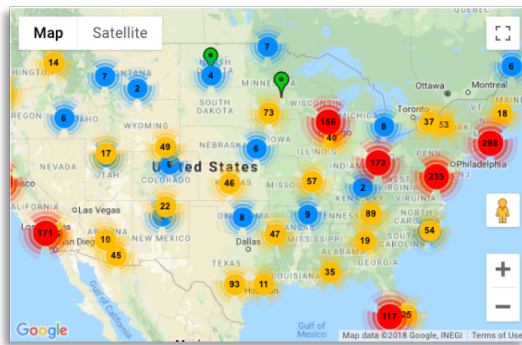
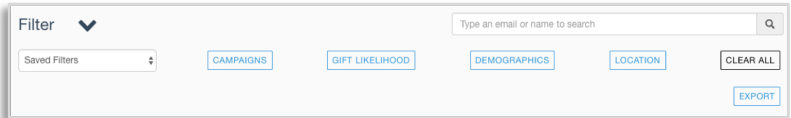
945

But most prefer to **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.

Verbatims

Question	Answer
1) How did you become interested in the mission of Cotley College? Please select all that apply.	I am attending or have attended Cotley College about the mission of Cotley College; I am a student
2) Was there an influential person in your life who inspired your appreciation of Cotley College?	Yes
2A) What is your relationship with this person: - user entered "Yes" for 2) inspiring person	P.E.O. Sister
3) How do you engage with Cotley College? Please select all that apply:	Alumnae Events; Browsing the website and P.E.O. Gatherings; Donating; Faculty or staff to Campus; Commencement; Recruiting at students
3B) How often do you engage with Cotley College? - dropdown for any answer: How do you engage...	Weekly
4) Which of Cotley College's core values is most important to you? Please select one.	Develop Women's Leadership by providing grow intellectually, socially, aesthetically, or physically in order to realize individual potential
5) When thinking about future generations, how important is it to you that Cotley College is able to continue our tradition of academic excellence and an engaging campus community?	Of utmost importance
Donating online with a credit card	I am likely
Mailing a check	I am likely
Talking with a gift officer face-to-face or on the phone about making a substantial impact	I am likely
Making a recurring contribution	I am likely
Funding a scholarship	I am likely
Donating from a Donor Advised Fund or Family Foundation Trust	I am likely
Giving property (such as jewelry, artwork, or a car)	I am likely
Giving appreciated assets (such as personal or business stocks or bonds, land, or rental real estate, etc.)	I am likely
7) Many people like to include gifts in their will to support causes that are most important in their lives. Would you consider a legacy gift to Cotley College to benefit future generations of outstanding women?	I am interested in making this type of gift to Cotley College.
guides	Please send me information to help with my guides
8) How does Cotley College rank in comparison to other organizations you support?	Near the top of my list
Age	Under 40
Gender	Female
What is your marital status?	Not married
Which of the following best describes your family?	No children
Please tell us the highest level of education you completed:	Bachelor's degree
Please select the option(s) that best describe your professional life.	Other; Volunteering; Working part time
Please specify: - user entered "other" for professional life	Student
opt-in	Send me occasional emails with stories and information from our website and other marketing
ref	email

Digital Body Language

June 2018

Visited your microsite
June 28, 2018
impact.cotley.edu/wp-content/uploads/sites/44/2018/06/Cotley-SupportFuture v3.pdf

Score Impact

Date	Description	Score Impact
Jun 28, 2018	Indicated they are likely to talk to a Gift Officer	○○○○●○○○
Jun 28, 2018	Indicated they are likely to give property	○○○○●○○○
Jun 28, 2018	Indicated they are likely to donate from a donor advised fund	○○○○●○○○
Jun 28, 2018	Indicated they are likely to give appreciated assets	○○○○●○○○
Jun 28, 2018	Indicated they are considering a gift	○○○○●○○○
Jun 28, 2018	No children	○○○○●○○○
Jun 28, 2018	PDF Guide Download click	○○○○●○○○
Jun 28, 2018	Deep visit (2 minutes or more than 3 pages)	○○○○●○○○
Jun 28, 2018	Highest education: Bachelor's degree	○○○○●○○○
Jun 28, 2018	Ordered one or more guides	○○○○●○○○
Jun 28, 2018	Near the top of my list for charitable giving	○○○○●○○○
Jun 28, 2018	Indicated your mission is of utmost importance	○○○○●○○○
Jun 28, 2018	Indicated a person inspired them to appreciate mission	○○○○●○○○
Jun 28, 2018	Indicated they are likely to donate through credit card	○○○○●○○○

Donor Journey

Consideration Stage

Left a gift

Considering

Might consider

Will not consider

05/09/2015 08/08/2016