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Moves Management

Nonprofit Partners Forum

March 29, 2007

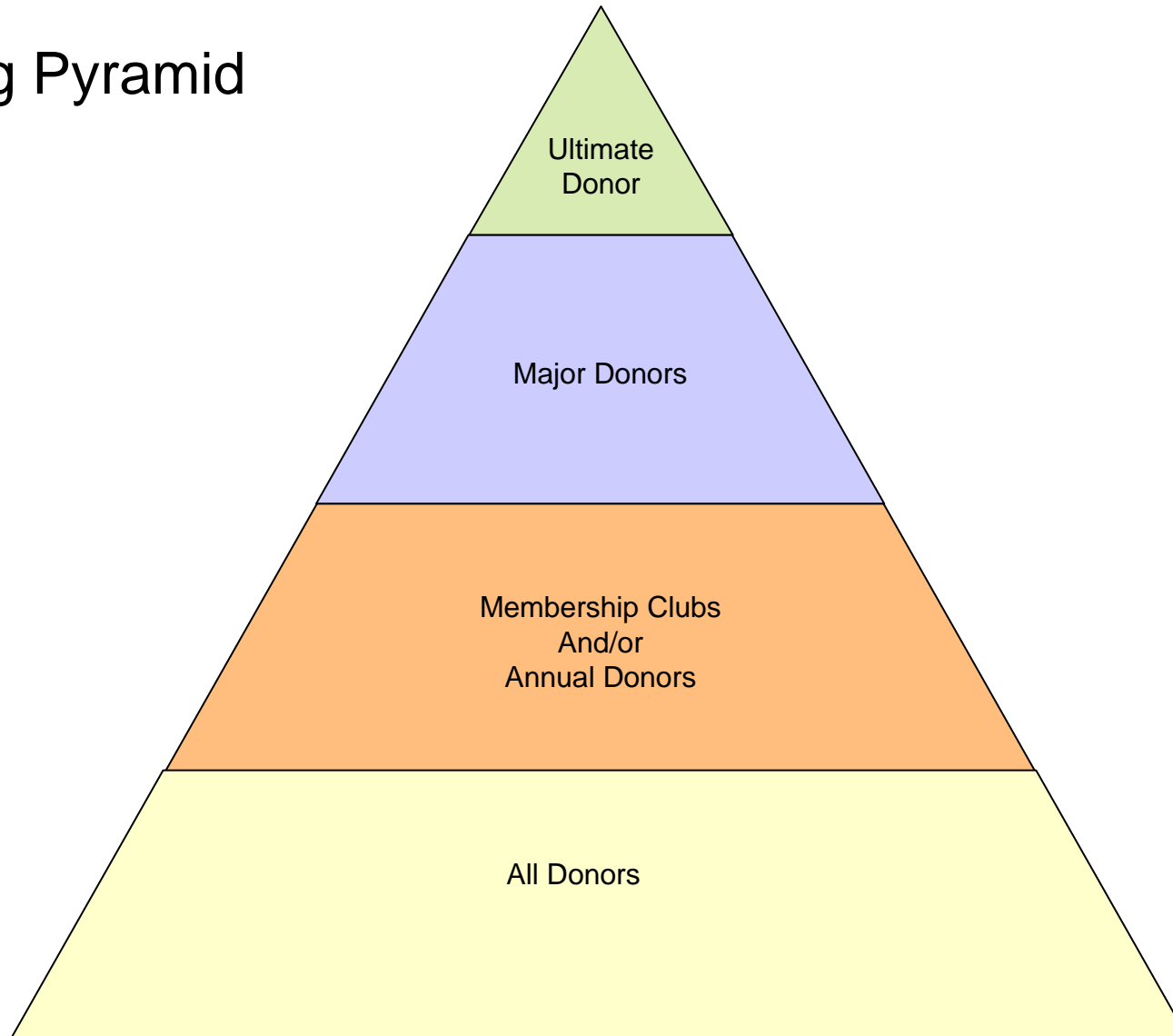


Goals

- Provide a basic understanding of moves management
- Hear from a panel of nonprofit partners practicing moves management
- Answer questions



Giving Pyramid





History

- Emerged in the late 80-s, early 90's
- Followed a customer relationship management (CRM) process practiced in business and sales



Definitions of Moves Management

- Clearly defined actions designed to “move” a prospect towards making a commitment
- Planned prospect contact with a fixed action and objective
- Strategic sequencing of “moves” to develop the prospects relationship with an organization



Effective Moves Management

- Builds relationships with prospects by systematically guaranteeing they are receiving the right cultivation move at the right time
- Examples:
 - Friends/membership programs
 - Events
 - Invitation to site visits
 - Incorporating professional advisors
 - Schedule calls and visits



Benchmarks

- 50-100 prospects
- 400 moves per year
- 6-10 quality contacts to make an ask
- 18-24 months typically timeframe
in fund development





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Develop a process to your pipeline





Managing the Process

- Review
- Plan
- Coordinate
- Execute the moves
- Evaluate
- Report



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Success based on the...

- Quality
- Frequency
- Continuity



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Moving Prospects Thru the Fundraising Cycle

- Identification
- Qualification
- Cultivation
- Solicitation
- Lots of Stewardship



Getting Started

- Establish the “Who”
- Set Moves Management Meeting
 - Plan and evaluate ‘moves’
 - Revise strategies as needed
- Establish Tracking
- The Moves Report or Spreadsheet
- Contact Reports



Implementation

- Small Shops – Can We Do This? Yes
- Seek commitment from all parties
- Start slowly with a small number
- Be disciplined
- Evaluate regularly



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Panel

- Our Nonprofit Partners
- Names, titles, orgs



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Questions

