

PROSPECT MANAGEMENT

HOW CAN WE HELP?

INTERACTIONS SUPPORT

Ask strategy, timing, likelihood scoring, and pipeline forecasting support, including assistance with solicitor credit and revenue questions to ensure accurate projections and reporting.

EMAILS

Bi-weekly Fix-It File emails and quarterly upcoming opportunity reviews.

PLANS

Plan creation and management, stage guidance, and best-practice recommendations for major gift, leadership annual, and suspect referral plans.

RATINGS

Support for 5-Year and Lifetime ratings, qualification, and future prospect designation.

OPPORTUNITIES

Ask strategy, timing, likelihood scoring, and pipeline forecasting support to ensure accurate projections and reporting.

TRAINING

Comprehensive Research & Prospect Management Deep Dive training delivered jointly with the Research team.

CLEAN-UP & STRATEGIES

Portfolio reviews, GAIL interaction clean-up, and strategic recommendations to move prospects forward.

ONGOING SUPPORT

Continuous troubleshooting, guidance, and partnership—Prospect Management Liaisons are always available.

REPORTING & SNAPSHOTS

Development activity, detail, and pipeline reporting with monthly snapshots and quarterly refreshes.

RPM MEETINGS

Quarterly, snapshot-driven portfolio conversations with Prospect Management and Research.

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