

Catch the Right Wind in Your Sails

A comprehensive and accurate supporter database is one of your advancement team's most valuable and effective tools. Managing your database of supporters and prospects helps you identify when and how people give to you and can help you shepherd supporters through the six steps of moves management.

People Give Money to Leadership

At the end of the day, supporters do not give to your school because of your advancement goals or the architectural designs of the new classrooms your capital campaign will fund. They give to your school because they believe in your mission and trust your leadership to spend their money wisely. Schools can demonstrate the strength of their leadership teams by implementing a process-based, outcomes-focused advancement strategy.

Organizational Structure

Your school's organizational structure can help build trust between your school's leadership and prospective supporters. A clear organizational structure that delineates responsibilities makes it easy for everyone on your team to understand their roles and how they can work together as a team. It demonstrates to supporters and prospects that your team is well-organized and well-managed.

EScale Tip: Leadership matters. At the end of the day, supporters are most likely to give to your school if they trust your leadership team.

At Escale Advisors, we encourage schools to adopt an organizational structure similar to that found in Gino Wickman's *Traction*. At the top of the chart is the Visionary, typically your school's headmaster, priest, or pastor, who sets the organization's strategic vision. The Visionary works with the Integrator, typically the chief of staff, who manages the school's team and holds them accountable. Three teams work under the Visionary and Integrator: the Administration, Programming, and Advancement teams. The Administration team manages the school's business operations, while the Programming team delivers the learning experience to students.

The Advancement team is responsible for attracting and retaining students and supporters. They manage enrollment and student retention as well as the school's database of suspects, prospects, and current supporters. They build and execute marketing campaigns to attract new students and new investors in your school. Their success is built on having accurate and comprehensive data about your school's current, past, and prospective supporters.

Customer Relationship Management Systems

Your school's customer relationship management, or CRM, system is the air traffic control of its advancement program. It empowers your advancement team to track gift transactions and manage every relationship you have with a current, past, or prospective supporter, whether they are a first-time annual giver or have included your school in their estate plan. You can use the data in your CRM to gain insights about your supporters and drive future giving.

Escale Tip: Before you invest in a CRM tool, think about what you need the tool to do for you. Then, choose a tool that fits those needs. To avoid frustration, don't invest in a tool that has more (or less!) functionality than you need.

Collect Customer Data

Use your CRM to collect and store data about your supporters and prospects. This includes basic information, such as their name, phone, and email, as well as more advanced data, such as their affinity, capacity, and readiness to give to your school.

	<i>Personal Data</i>	<i>Relational Data</i>	<i>Giving Data</i>
<i>Basic</i>	Name Phone Email Mailing Address Birthday/Graduation Date	Past Giving History Role at Your School (parent, alumni, staff) Interactions with Your School Preferred Method of Communication People They Know	Amount of Past Gifts Frequency of Past Gifts Method of Giving
<i>Advanced</i>	Occupation Real Estate	Affinity for Your School	Capacity to Give Readiness to Give

Choosing a CRM System

Fancy CRM, stripped-down functionality, or a simple Excel spreadsheet—each can make an effective CRM depending on your needs. Whatever CRM tool you choose, you must make sure that your advancement team lives in that system. Create and document processes that drive people back to the CRM. Encourage team members to record interactions with supporters directly into the system. Escale Advisors can help you determine which CRM is the best fit for your team.

Finding and Catching the Right Wind in Your Sails

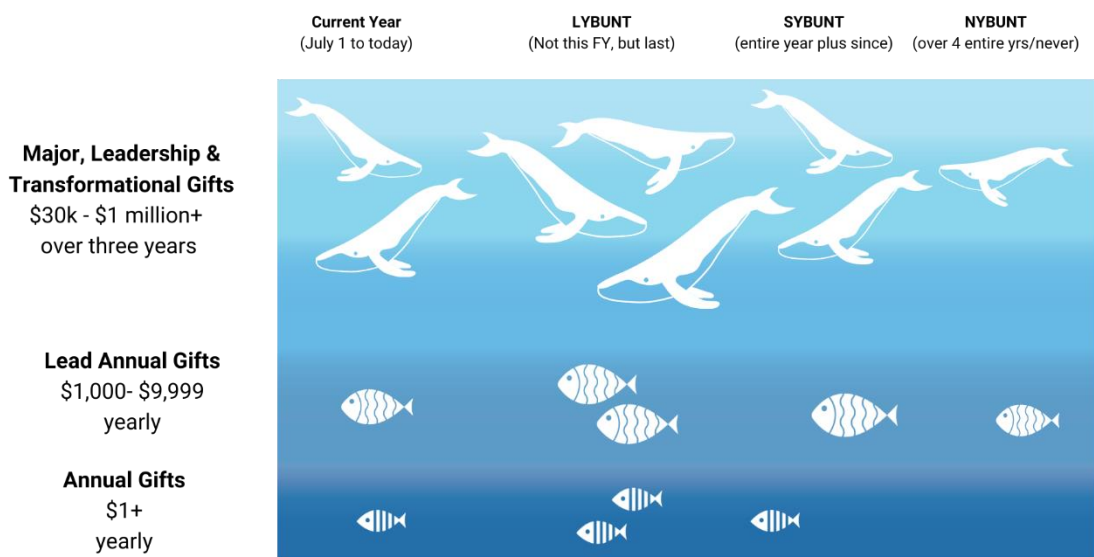
Compiling all your supporter data into your CRM puts information at your fingertips. It is up to you and your advancement team to use this data to prioritize who you reach out to and when. This is what it means to catch the right wind in your sails—to advance your mission, you need to reach out to the right people for the right amount at the right time.

LYBUNTs, SYBUNTs, and NYBUNTs

Categorizing your supporters into LYBUNTs, SYBUNTs, and NYBUNTs can be helpful when prioritizing your outreach efforts. A LYBUNT is someone who has supported your school *Last Year But Unfortunately Not This* year. A SYBUNT is someone who has supported your school *Some Year*

But Unfortunately Not This year. Lastly, a NYBUNT is someone who has supported your school *No Year But Unfortunately Not This year.*

Once you've categorized each of your donors into LYBUNTs, SYBUNTs, and NYBUNTs, further categorize them by gift type (annual, lead annual, and major gifts). Major gift-giving LYBUNTs are the big fish in the sea and should be your priority. Current-year major gift supporters and SYBUNT major gift supporters should be your second priority, as well as LYBUNT annual and lead annual givers. Third on your list should be current-year and SYBUNT lead annual givers as well as LYBUNT annual givers.



Getting Started

Once you have loaded your CRM with data and categorized your supporters, it is time to use that information to plan how you will spend your advancement capital. Your advancement capital includes not only your financial budget but also the people hours you will invest in each type of gift and type of supporter.

For example, if you know you want to raise a certain amount of money from your LYBUNT major gift supporters, think about the amount of financial capital and people hours you will need to invest to earn that result. Repeat this process until you have allocated all of your advancement capital. Review your whole plan to confirm that it is reasonable and attainable. Then, it's time to get to work!



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Closing Thoughts

For your supporters, especially your major gift supporters, good leadership equates to high investability. Organize your team well and encourage everyone to work to their strengths within their area of responsibility. Have your advancement team organize your supporters into a CRM and ask them to use this tool regularly to set advancement goals and manage supporter relationships. Staying organized and implementing a strong advancement plan based on your supporter data will help you see more success.