



Leading positive change

Building and Managing an Integrated Plan ◇ *Duration: 1 Day*

Overview	Do you have multiple channels raising funds from the same group of donors? Do you want to ensure your donors are respected and minimize donor fatigue? This course will teach you how to take your overall program goals and use your existing channels to reach them with one unified voice in messaging and timing. Raise more money with less cost and fewer donor contacts.
Topics	All Partner meetings and goals Timing is everything The right channel for the right reason Building the Plan Analyzing the results
Target Audience	Fundraisers with more than 3 years experience in the role Managers and Directors of Annual Giving Programs Owners of Annual Giving Programs who use 2 or more channels to raise funds

Course Content

Introduction

Overall Program Goals

How vendors are measured
Changing the way we work with vendors
Changing the way we allocate budget
Changing the way we look at results

All Partner Meetings

How to use your partners to reach your goals
Getting all your vendors on the same team – YOURS!
What information you need build the plan

Timing is Everything

Contact Strategy
Using the right channel in the right sequence
From planting the seed, to nurture to harvest

Integrated Messaging

One voice of the organization, one message
Customized message based on the channel
Channels sharing resources and learnings

Use of Channels

Strengths of major annual giving channels
Use of channels in warm up and follow up
Customizing the donor experience

Building the Plan

One spreadsheet, all integrated programs
Sample plan – how to use excel

Managing the Plan

Updating the results
Managing to the big picture
Quarterly Updates

Analyzing the Results

Holistic program management
Planning for next year

Conclusion and Course Summary