



Premier Special Topics Cheat Sheet

Campaign Management

Overview

- The Campaign Manager was created to help you plan and carry out any type of campaign, be it Annual, Capital or Building, Endowment, Scholarship, etc.
- You can add any number of campaigns and they can run at the same time or overlap if need be.
- You can access the Campaign Manager from Task menu, from the Campaign tab or from the Campaign Code in Application Setup.
- There quick shortcuts to doing certain things related to your Campaigns on the Navigator Bar.
- The Campaign Manager has 5 steps for managing a campaign.
- You may not use, nor are you required to use, all 5 steps when doing a campaign.
- The first step is creating your Campaign Code, Gift Range and Ask Range Levels.
- The second step is setting up the Solicitation Stages and establishing goals for your Solicitors.
- The third step is adding Prospects to your Campaign.
- The fourth step is creating targeted mailings.
- The fifth step is producing Campaign Reports for evaluating your campaign.

Step One – Creating a Campaign Code, Gift Range Levels and Ask Range Levels

- A new Campaign Code, like all Codes, is added in Application Setup under the Codes tab.
- While the Campaign Code field shows up in both the Gifts & Pledges module and the Bio module (on the Actions tab), when adding a new Campaign Code, you must go to the Gift codes in Application Setup.
- The Gift Range Chart helps you determine how many gifts for each amount you need to raise in order to meet your goal for the campaign.
- You can setup the Gift Range Chart by selecting the Gift Range Calculator button.
- You can also create or modify the Gift Range Chart by going into the Campaign Manager and clicking on the Gift Range Chart tab.
- The Gift Range Chart can be entered by hand using the Custom option or it can be calculated automatically using one of the 3 available options.
- While the Gift Range Chart helps you keep track of your overall progress in meeting your Campaign Goal, the Ask Range codes are used to assign Prospects to the appropriate giving range in the Gift Range Chart.
- The Ask Range Codes only show up on the Campaign tab in the Bio module and are therefore added under the Bio Codes in Application Setup.
- We highly recommend that the Ask Range Codes correspond to the ranges in the Gift Range Chart.

Step Two – Setting up Solicitation Stages and Establishing Goals for Solicitors

- The next step is to determine the Solicitation Stages (if you are planning on using them) and establishing who will be your Solicitors, as well as what their fundraising goals will be.
- The Solicitation stages for the campaign are established on the Campaign Overview tab of the Campaign Manager.
- When you click on Edit, the program will automatically insert default stages into all 8 fields.
- If you want to change the order of the stages or rename any of them, just highlight and copy/paste, delete or type in what you want.
- You can certainly use less than 8 stages, if you want to.
- The Solicitors are added from the Solicitor Code field and are defined as current or former Board and Staff Members.
- Because Solicitor Codes show up on both the Bio and Gifts module, they can be added from either in Application Setup.
- Finally, the progress thermometer shows all gifts and pledges with the matching Campaign code.

Step Three – Adding Prospects

- In order for your donors to be assigned as Prospects, they must have a Biographical record.
- Prospects added to a campaign can be Individuals with an Entity or Entities themselves, such as Organizations.
- A Prospect is added to a single campaign only once, but a prospect can be added to multiple campaigns should that be necessary.
- A single prospect can be added manually from the Campaign tab on the Bio module or you can add prospects individually or as a group from the Prospect Assignments tab in the Campaign Manager.
- To add a group of Prospects in the Campaign Manager, click on the Add Prospect button in the top right hand corner.
- Prospects that are already added to the campaign will not be added again in subsequent groups, even if they match the extraction criteria.
- After you have added prospects to the campaign, you can then select one or more of them either by clicking on the Select boxes individually, clicking on All or by clicking on A Group and choosing the criteria.
- Once you have some prospects selected, you can edit them as a group, changing any of the campaign fields for that group.
- You can also add an Action to all selected prospects, or even remove them from being a prospect.

Step Four – Targeted Mailings and Adding Gifts

- The Campaign Ask Merge is a letter template which you can set up and modify yourself for sending targeted mailings to your Prospects.
- This particular letter template includes the Ask Amount.
- You can send it to all your prospects or you can use the Extraction engine to narrow down who you want to send it to, such as everyone with specific Ask Range.
- Keep in mind that after producing the mailing for those you extracted on, the program does not automatically update the Stage.
- To update the Stage for all those people you just solicited, open the Campaign Manager, go to the Prospect Assignments tab and select the Group based on the same extraction criteria for the mailing, then (once they are checked) globally Edit their Stage.
- Adding a gift will update the gift info on the Campaign tab in the Biographical Module and the Prospect Assignments tab in the Campaign Manager
- When a gift comes in that is related to the Campaign, keep in mind that adding a gift for a prospect does not automatically change the Stage for that prospect (from follow-up to steward, for example).

Step Five – Reports

- You can run all six of the Campaign Reports from the System Reports screen, whereas only 3 of the reports can be run from the Campaign Manager.
- When you are on the Campaign Overview tab, this will run the Campaign Solicitor Report.
- When you are on the Prospect Assignments tab, this will run the Campaign Prospect Report.
- When you are on the Gift Range Chart tab, this will run the Campaign Gift Range Report.
- In the System Reports screen under the Gift & Pledges Reports Option are the Campaign Gift Range Report, Campaign Prospect Detail Report, Campaign Prospect Report and the Campaign Solicitor Report.
- The Campaign Gift Range Report is the same as the one from the Campaign Manager except it has some additional choices about what gifts to show.
- The Campaign Prospect Detail Report has lots of details about individual prospects and can be a helpful tool for your solicitors when they are doing solicitations or following up a solicitation.
- The Campaign Prospect Report is the same as the one from the Campaign Manager, but with some slight extraction differences.
- The Campaign Solicitor Report is also the same as the one from the Campaign Manager, but with some slight extraction differences.
- The Campaign Statistics shows a count of prospects and gifts, with total ask amount and total given, broken down by the Campaign fields (eg. Ask Range, Solicitor, Staff, Stage, etc.).
- Remember that while some of the reports have pre-running windows that contain things to extract on or things to include or not include, the Extraction Engine contains all the fields related to the Campaign tab on the Master Bio screen.