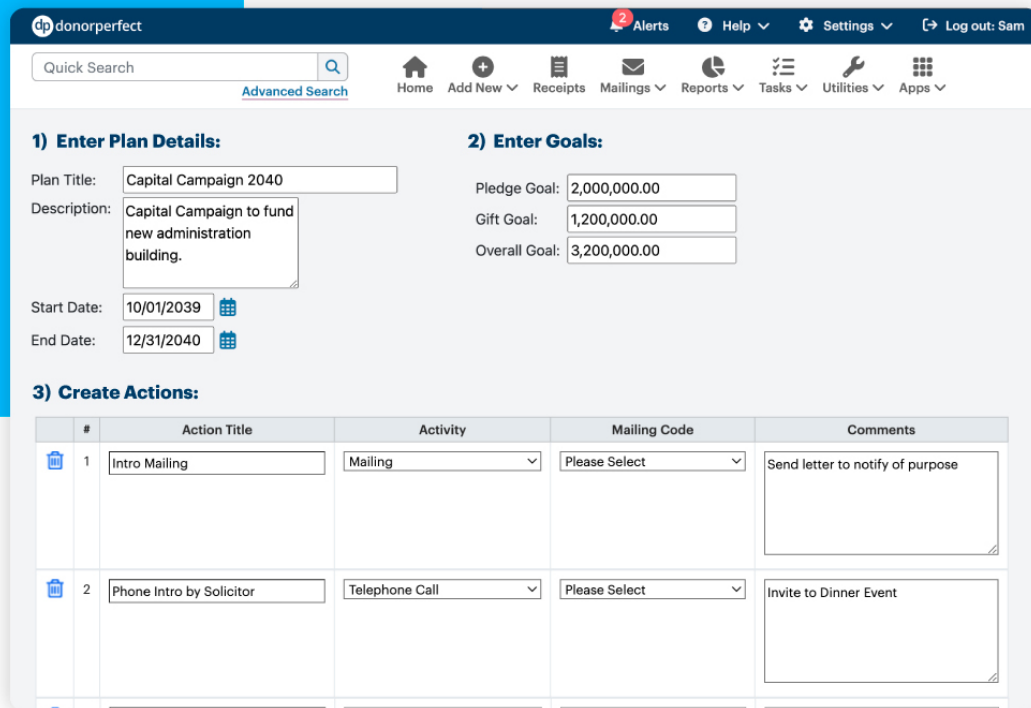


Maximizing Major Gifts

With DonorPerfect's Moves Management Module



The screenshot shows the DonorPerfect Moves Management Module interface. The top navigation bar includes the DonorPerfect logo, Alerts, Help, Settings, and Log out: Sam. Below the navigation bar is a Quick Search field and a menu with options: Home, Add New, Receipts, Mailings, Reports, Tasks, Utilities, and Apps. The main content area is divided into three sections:

- 1) Enter Plan Details:** Plan Title: Capital Campaign 2040; Description: Capital Campaign to fund new administration building.; Start Date: 10/01/2039; End Date: 12/31/2040.
- 2) Enter Goals:** Pledge Goal: 2,000,000.00; Gift Goal: 1,200,000.00; Overall Goal: 3,200,000.00.
- 3) Create Actions:** A table with columns: #, Action Title, Activity, Mailing Code, and Comments.

#	Action Title	Activity	Mailing Code	Comments
1	Intro Mailing	Mailing	Please Select	Send letter to notify of purpose
2	Phone Intro by Solicitor	Telephone Call	Please Select	Invite to Dinner Event

Introduction

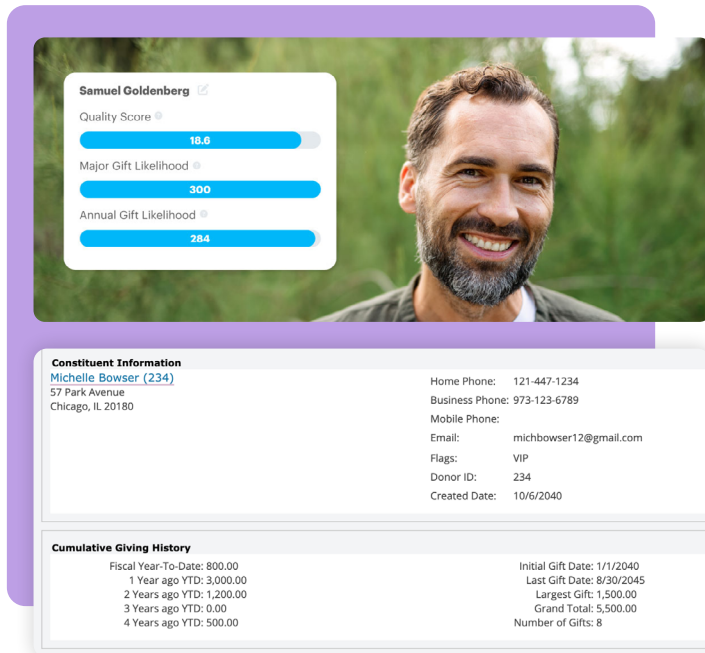
Major donors are the lifeblood of any nonprofit organization's fundraising. Even though major donors make up a small percentage of the donor base, they often account for 80% or more of total fundraising revenue. Cultivating relationships with major donor prospects and inspiring them to give transformational gifts is critical to funding your nonprofit's mission and programs.

DonorPerfect's Moves Management module provides powerful tools to help you strategically move major donors through your pipeline, and ultimately secure major gifts to support your cause. This guide will show you how to leverage DonorPerfect's Moves Management features and reporting to maximize your major gift fundraising potential.

Step 1: Identifying Major Donor Prospects

The first step in major gift fundraising is pinpointing the high net worth individuals in your donor database who have the capacity to make a major financial contribution.

DonorPerfect makes it easy to screen your donors for major gift potential:



The screenshot shows a donor profile for Samuel Goldenberg. It includes a photo of a smiling man with a beard. To the left of the photo is a summary box with three horizontal progress bars: Quality Score (18.6), Major Gift Likelihood (300), and Annual Gift Likelihood (284). Below the photo is a 'Constituent Information' section with contact details for Michelle Bowser (234), including address, phone numbers, email, and donor ID. At the bottom is a 'Cumulative Giving History' section with a table of giving data.

Cumulative Giving History	
Fiscal Year-To-Date: 800.00	Initial Gift Date: 1/1/2040
1 Year ago YTD: 3,000.00	Last Gift Date: 8/30/2045
2 Years ago YTD: 1,200.00	Largest Gift: 1,500.00
3 Years ago YTD: 0.00	Grand Total: 5,500.00
4 Years ago YTD: 500.00	Number of Gifts: 8

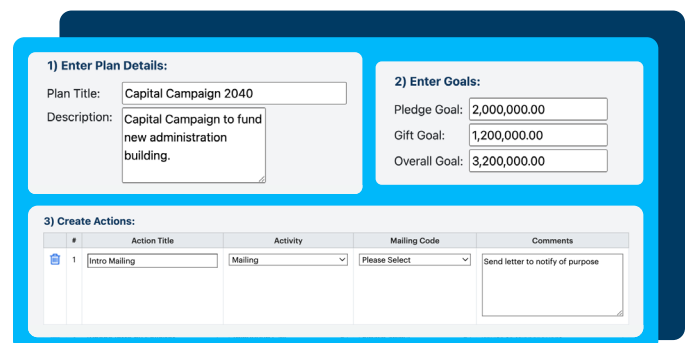
- Use the DonorSearch integration to uncover donors' wealth indicators like real estate holdings, stock ownership, political giving, and charitable contributions to other organizations. This data syncs seamlessly with your DonorPerfect records.
- Run key reports like the Top Donor Listing report to see who your most generous supporters are. The Giving History report also reveals loyal donors who have given consistently over many years.
- Set up Wealth Rating fields to assign major gift potential scores to donor records based on the wealth screening data. This allows you to quickly filter your database for top prospects.

Step 2: Developing Moves Management Plans

Once you've identified a group of major donor prospects, the next step is creating individualized "moves management" plans to cultivate each one. A moves management plan lays out the specific timeline of touches and appeals tailored to each major donor.

In DonorPerfect's Moves Management module, you can:

- Create a plan with an overall fundraising goal and timeline
- Define up to 60 custom "moves" or actions, such as phone calls, meetings, tours, event invites, appeals and more
- Assign moves and due dates to different staff
- Track the status and outcome of each move



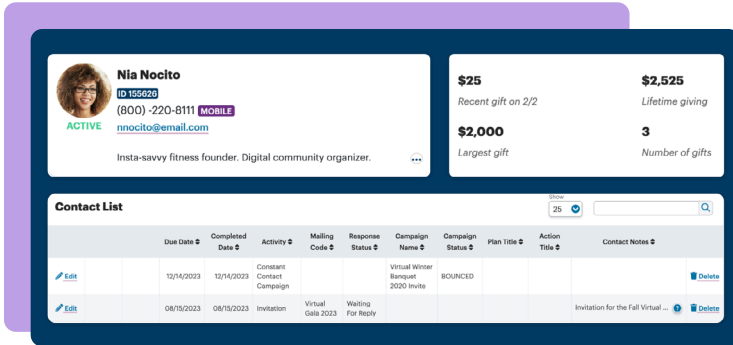
The screenshot shows the 'Enter Plan Details' and 'Enter Goals' sections of the Moves Management module. The 'Enter Plan Details' section includes fields for Plan Title (Capital Campaign 2040) and Description (Capital Campaign to fund new administration building). The 'Enter Goals' section includes fields for Pledge Goal (2,000,000.00), Gift Goal (1,200,000.00), and Overall Goal (3,200,000.00). Below these is the 'Create Actions' section, which is a table with columns for Action Title, Activity, Mailing Code, and Comments.

#	Action Title	Activity	Mailing Code	Comments
1	Intro Mailing	Mailing	Please Select	Send letter to notify of purpose

Having a moves management plan ensures no major donor falls through the cracks and that your team is strategically moving them towards a major gift.

Step 3: Tracking Major Donor Relationships

Staying on top of your major donor relationships is key to keeping them engaged with your mission. **DonorPerfect provides a 360-degree view of all interactions with each major donor prospect:**



The screenshot shows a donor profile for Nia Nocito. On the left, there is a profile card with her name, ID 155628, phone number (800) -220-8111, and email nnocito@email.com. It also notes she is 'ACTIVE' and an 'Insta-savvy fitness founder. Digital community organizer.' On the right, there are two summary boxes: one for '\$25 Recent gift on 2/2' and another for '\$2,525 Lifetime giving'. Below these are two more boxes: '\$2,000 Largest gift' and '3 Number of gifts'. At the bottom, there is a 'Contact List' table with columns for Due Date, Completed Date, Activity, Mailing Code, Response Status, Campaign Name, Campaign Status, Plan Title, Action Title, and Contact Notes. Two rows are visible in the table.

Due Date	Completed Date	Activity	Mailing Code	Response Status	Campaign Name	Campaign Status	Plan Title	Action Title	Contact Notes
12/14/2023	12/14/2023	Constant Contact Campaign		Virtual Winner	Virtual Winner Banquet 2020 Invite	BOUNCED			
08/15/2023	08/15/2023	Invitation		Virtual Gala 2023	Waiting For Reply			Invitation for the Fall Virtual ...	

- Easily see a donor's lifetime giving total as soon as you open their record
- Review their complete donation history and all "moves" logged for that donor
- Set up SmartActions that alert your team whenever a major donor makes a gift or reaches a giving milestone
- Schedule contacts, meetings, and reminders that sync with your Outlook or Google calendar

With all major donor data centralized in DonorPerfect, your entire team can work together to provide major donors with great stewardship.

Step 4: Leveraging Moves Management Reports

The Moves Management module includes several useful reports to analyze your major gift fundraising efforts:

- Moves Management Campaign Analysis shows the overall results for each plan, including money raised, largest gifts, and completed moves
- Moves Management Campaign Comparison allows you to compare performance across multiple plans
- Closed Actions report provides a detailed look at all completed moves within a plan

Review your Moves Management reports regularly to see what's working, spot potential issues, and refine your major donor cultivation strategies over time. Measuring and improving your moves management process will ultimately lead to more major gifts.

Conclusion

Inspiring major donors to give isn't easy, but having the right tools makes a big difference. With DonorPerfect's Moves Management module and major donor reports, you'll be able to identify your best prospects, create strategic cultivation plans, provide great stewardship, and maximize major gift revenue to fuel your mission. Any nonprofit looking to increase their major giving needs to leverage the power of moves management - and DonorPerfect provides everything you need for success.