



**2023 RNL NATIONAL
DONOR ENGAGEMENT
WORKSHOP** July 26-27

WELCOME



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How to Turn Your Digital Engagement Center Into a Leadership and Major Gift Pipeline Engine

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Director of Leadership
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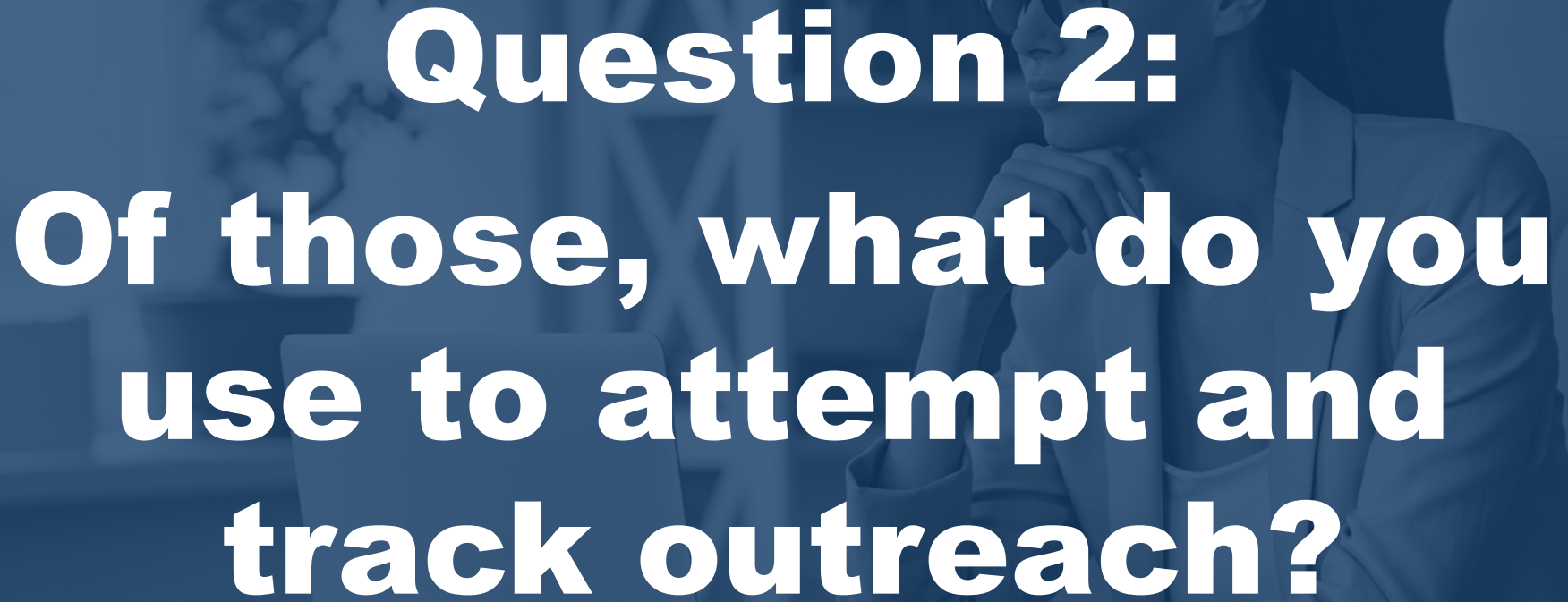
Sarah (Patterson) Glitsch



AVP, Client Success,
Software

A woman with glasses, wearing a business suit, is sitting at a desk with a laptop. She has her hands clasped under her chin and is looking thoughtfully at the laptop screen. The background is a blurred office setting. The entire image has a blue tint.

Question 1:
**How many have a
Leadership Giving
program?**

A woman in a business suit and glasses is sitting at a desk with a laptop, looking thoughtful. The background is a blurred office setting. The text is overlaid on the image in a large, white, bold font.

Question 2:
**Of those, what do you
use to attempt and
track outreach?**

1



Historical process

The old method

How gift officers managed a portfolio

- Portfolio tracking in Excel
- Gift Officers searching for information in CRM
- Decentralized channels – email, video, cell phone
- Manual record keeping and lack of uniformity
- Each Gift Officer created their own process

The old method

How leadership managed the team

- Relied on self-reporting; lack of accountability
- Collection of data from CRM to populate Excel
 - Immediately out of date
 - Manual time to format and forecast via Excel
 - Once behind, impossible to catch up
- Consistency of reporting, especially to leadership
 - Because outreach was manually tracked, data would go missing

2



How it started

Thinking smarter

Finding a better way forward

- Discovery meeting in late September 2022
- Determining the cadence
- Connecting the channels
- Preparing the data for CRM
- Keeping things current

3



Progress so far

How it's going

Successes and lessons learned

- Launch late January 2023
- Fine-tuning the cadence
- Refining the portfolio, focus on Discovery
- Tracked outreach increased tenfold
- Adding in cultivation, solicitation and stewardship



How **RNL Engage** Transforms Major Gift Outreach

Before

Oct. 2022

Rachel sends a generic email to a lapsed donor.

Since there is no cadence plan or tech, outreach stops.

After

1/29 Rachel sent an initial Thankview message (no response from donor).

1/31 Rachel sent a follow-up email (no response from donor).

2/08 Rachel sends a text message (donor respond to call back).

2/09 Rachel speaks with the donor on the phone. Meeting scheduled at the Law School.

2/15 Rachel and the Law School Gift Officer donor met, which yielded a substantial gift.

Result

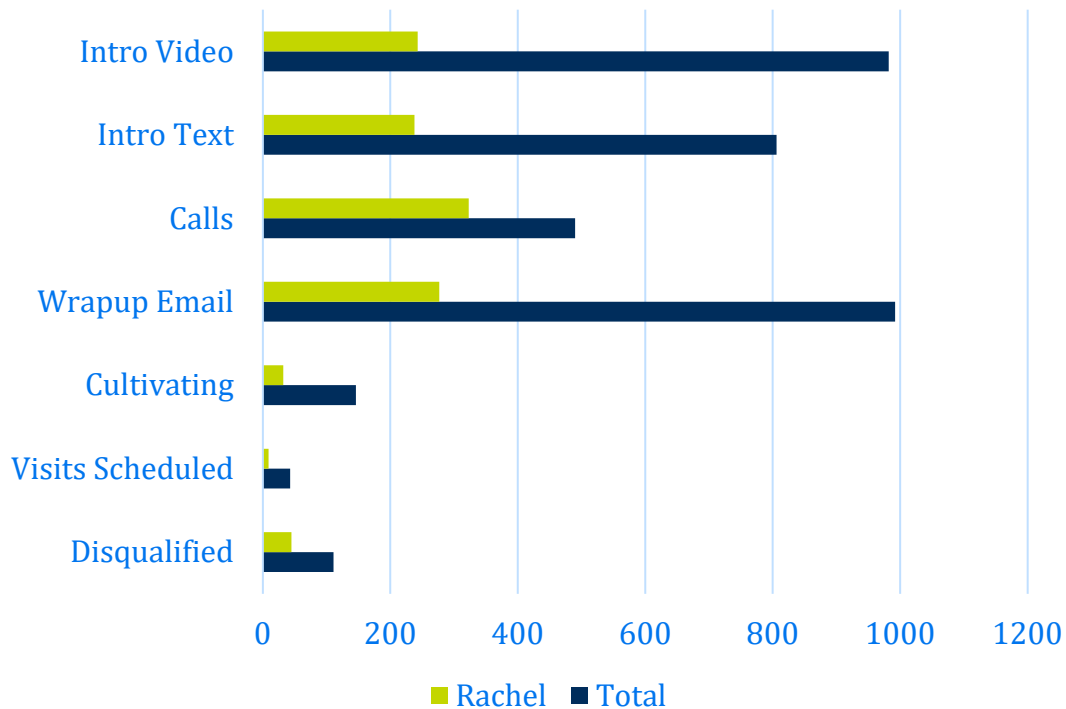


\$50,000

gift

to establish an endowed scholarship

Metrics



3,955



Actions with 30%
movement

Questions?

Thank you!



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