

Welcome to Fundraising 2.0

We're excited to kick off the 2019 Fundraising Season, and with that we would like to introduce Fundraising 2.0. This is a guideline to ensure everyone is on the same page

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PROCESS

SSP and Cadence

Please refer to the current SSP and Cadence guidelines released by management.

Meetings

You will have at least two weekly meetings with your Team Lead to discuss questions related to the SSP and Cadence as well as any product or process related questions. This is a forum for you to discuss your experience with everything laid out and designed to improve upon the process. Experience and trial is the greatest way to improve on any guideline.

Leads and Lead Generation

Leads

All Leads will be monitored and prioritized to you as a rep. This will take out the guesswork and allow you to do what you do best, and that is contact groups. Past your initial set of groups, all groups will be added to your individual sheet, checked for duplicates, created with a 2019 Agreement and in your name.

Lead Priorities

Leads are assigned a fiscal year priority based on the following criteria. All Leads will be managed according to their priority and time of the year. When given leads the most relevant leads based on these factors will be given.

Priority 1- All Schools, Fall Sports, and Rep Deemed Essential

Priority 2- Winter Sports, Community Groups, Non-Essential Groups (Unless working, all notes scheduled for Sept 3, 2018)

Priority 3- Spring Sports (All Notes Scheduled for December 25, 2018)

Priority 4- Declined, Committed, Apparel and Pending Being Resigned Groups

Lead Generation

All Lead generation will be done by the Lead Gen Department. However, if you wish to turn over a group from one sport to another you must follow the process below

Group Number XXXXX1- SaveAround- Football

↳Decline Group, Use Status- Declined -Merged with Other Group

↳Create New Group xxxxx2, and new agreement

↳Group Name SaveAround-Basketball

Then you need to email Nick Guzzi with the Old and New group info.

Ex.

Email Title- Group Conversion xxxxx1 to xxxxx2

Nick,

I declined group xxxxx1- SaveAround-Football, and wish to go after xxxxx2- SaveAround-Basketball

If you do multiple of these in a day please do so all under one thread as a reply to your initial email.

Adding New Leads

Pending- New Group

When searching for your own groups you can enter groups in your 4 markets by using this status. Only enter groups that you will begin to work immediately as any groups entered with this status will considered part of your current 500.

You can begin to search and assume responsibility of all Declined groups from your markets with no open notes, assuming they are not a duplicate. Be sure to go into the account and check for 2019 Notes should another internal rep be listed on the account. Any groups with "Pending-Process 90" are not to be turned over until the current rep has declined them **even if they are in your market.**

Any Groups that you enter via this method you need to add onto your personal lead sheet under the tab “Rep Created Groups” You only need to add the group number and market to that sheet

Lead Statuses

There will be a few new Sub Statuses introduced this year to allow for better flow and make them more relatable to the SSP and Cadence

Declined- Merged with Other Group

This status is used when you decline a group like a football team and then create an alternate group in the same school with a different name. This help help limit clutter in each school.

Declined-Cadence-

This status is used on all groups that you have declined due to cadence. (ie ghosted attempts)

Declined- Presentation

This status is used when you have made a presentation at any point in the sales process and the group never signed up or declined to work with us.

Pending- Process 90-

This status is used when a group asks you to call them in a different season or the group asks you to follow up more than 90 days out, and the agreement will be a 2019 agreement. You will schedule the follow up note for that time and change the pending group to this status.

Resources

PFR Focus Sheet

The Focus sheet is vital in keeping track of book delivery dates as well as availability. We will also use this to give leads based on non-saturated markets to help ensure your success

Fundraising Materials

Please refer to your Google drive after the published 2019 Materials have been released. Any errors in the collateral please contact jmewing@savearound.com