

Advancement Contact
List Solution



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Professional Services

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Help increase donations by improving your donor contact lists

With the Advancement Contact List Solution, Directors, or others in the Advancement Office, can streamline the process for creating contact lists, saving themselves time, ensuring more efficient messaging, and insuring that constituents are not inappropriately contacted – all to better support the goal of increasing donations. By allowing the end user to create a contact list based on a variety of prospect criteria, it puts the power of data access in the end user’s hands – no more waiting on data analysts or programmers to run new lists.

Benefits of the Evisions Advancement Contact List Solution



Frees up your time

Straightforward, easy-to-use interface makes list creation fast and easy



Ensures proper contacting

Safeguards constituents from being inadvertently or inappropriately contacted



No reliance on IT

Advancement can take control of its own contact lists



List flexibility

Numerous variables allow you to identify and include, or exclude, who you want on a list



Configurable

Aligns to your business processes

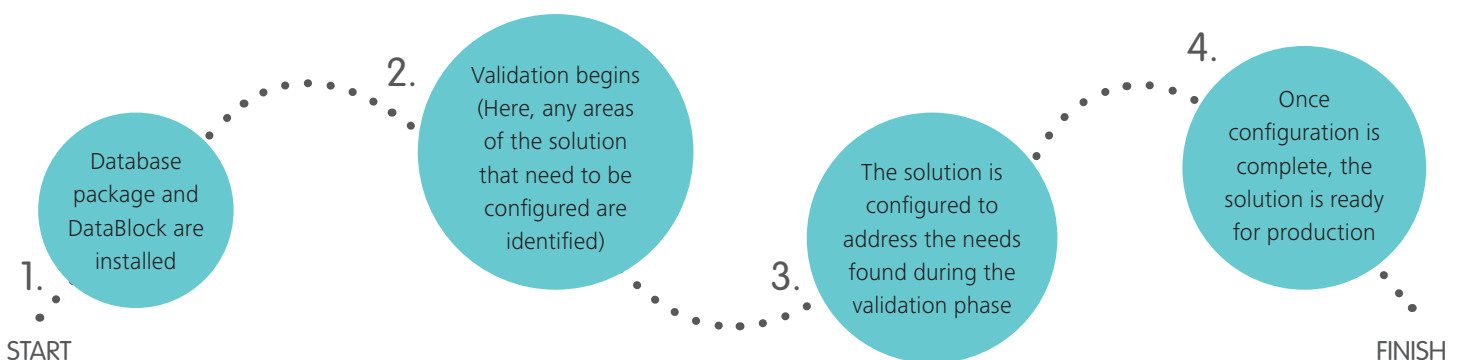


Output options

Generate lists based on preferred contact method (email, phone, address)

Implementation & Delivery

The Advancement Contact List Solution is quick and easy to implement:



How the Advancement Contact List Solution Works:

Contact List Solution (1.1)

List Types Alumni Donors Giving Groups Inclusions/Exclusions Preview

Mailing Type:

- Solicitation
- Non-Solicitation

List Type:

- Mail
- E-Mail
- Phone

Address Type:

- Individual
- Couple

Foreign Addresses:

- Include
- Exclude

Selection Criteria Will:

- Narrow the Selected Population
- Broaden the Selected Population

Entity Selection:

- Persons
- Non-Persons
- Both Persons and Non-Persons

Development Prospect Options:

- Do not Limit by Prospect Status
- Limit by Prospect Status

Select Prospect Status

Not Using Prospect Status Limits

1. Decide what list types you want to generate

Contact List Solution (1.1)

List Types Alumni Donors Giving Groups Inclusions/Exclusions Preview

Alumni Options:

- Do Not Limit by Alumni
- Limit by Alumni

Alumni Majors:

- Do Not Limit Alumni by Majors
- Limit Alumni by Majors

Alumni Classes:

- Do not Limit Alumni by Classes
- Limit Alumni by Classes

Select Alumni Majors:

ACCT - Accounting

ANTH - Anthropology

ARCH - Architecture

ART - Art

BIOL - Biology

BIOS - Biological Sciences

BUS - Business

BUSI - Business Administration

CHEM - Chemistry

COMM - Communications

Select Alumni Classes:

2015

2013

2012

2010

2009

2008

2007

2006

2005

2. Choose which alumni you want to contact

Contact List Solution (1.1)



List Types Alumni Donors Giving Groups Inclusions/Exclusions Preview

Donor History Options

- Do Not Use Donor Options
- Use Donor Options

Donor Category Options

- Do Not Limit Donors by Donor Categories
- Limit Donors by Donor Categories

Prior Giving Options:

- Do Not Limit Donors by Prior Giving Designations
- Limit Donors by Prior Giving Designations

Gift Society Options:

- Do Not Limit Donors by Gift Societies
- Limit Donors by Gift Societies

Select Donor Categories:

- ALCH - Alumni Chapter
- ALND - Non-degreed Alumna/us
- ALUM - Alumna/us
- ASIA - Associate Member
- BORD - Board Member
- BUSA - Business Associate
- COPD - Corporation

Select Prior Giving Designations:

- 1234 - Davis Family Scholarship
- 1998BENCH - Class of 1998 Senior Bench Fund
- 2TRMTR - Tutoring/Mentoring Fund
- AFSHOL - Allen Scholarship
- ALLENCHAIR - Allen Chair for Engineering
- ALLENSCHOL - Allen Family Scholarship
- ALLEN.AWD - Allen Award

Select Gift Societies:

- 1K - Athletic 1K
- AF1 - University Benefactors
- BLDR - Builders Club
- CENT - Century Club
- FNDR - Founders Society
- GOLD - Gold Society



3. Identify the donors you want to contact

Contact List Solution (1.1)



List Types Alumni Donors Giving Groups Inclusions/Exclusions Preview

Total Giving in Any One of the Selected Fiscal Years

- Select All Years
- 2011
- 2010
- 2009
- 2008
- 2007
- 2006
- 2005
- 2004
- 2003

- Select All Ranges
- 0 - 249
- 250 - 999
- 1,000 - 4,999
- 5,000 - 9,999
- 10,000 - 24,999
- 25,000 - 99,999
- 100,000 - 999,999
- 1,000,000 and Above

Cumulative Giving for All Selected Fiscal Years

- Select All Years
- 2011
- 2010
- 2009
- 2008
- 2007
- 2006
- 2005
- 2004
- 2003

- Select All Ranges
- 0 - 249
- 250 - 999
- 1,000 - 4,999
- 5,000 - 9,999
- 10,000 - 24,999
- 25,000 - 99,999
- 100,000 - 999,999
- 1,000,000 and Above

Largest Single Gift Amount Within Selected Fiscal Years

- Select All Years
- 2011
- 2010
- 2009
- 2008
- 2007
- 2006
- 2005
- 2004
- 2003

- Select All Ranges
- 0 - 249
- 250 - 999
- 1,000 - 4,999
- 5,000 - 9,999
- 10,000 - 24,999
- 25,000 - 99,999
- 100,000 - 999,999
- 1,000,000 and Above



4. Select donation amount information

Contact List Solution (1.1) Ar evisions Argos

List Types Alumni Donors Giving Groups Inclusions/Exclusions Preview

Geographic Region Options:

Do Not Limit by Geographic Regions

Limit by Geographic Regions

Project/Interest Options

Do Not Limit by Projects/Interests

Limit by Projects/ Interests

Activity Options

Do Not Limit by Activities

Limit by Activities

Select Geographic Regions:

- AC-DENVER - Denver Area Alumni Chapter
- AC-ENCENTL - East North Central Alumni Club
- AC-NYC - New York Area Alumni Club
- AC-PHILLY - Philly Area Alumni Chapter
- AUS - Australian State/Territory
- BALT/WASH - Baltimore/Washington Area
- BRENT - Brent Johnson
- CHAMBERV - Chamberlain On line
- CHICAGO - Chicago Metro Area

Select Projects/Interests:

- ACS - Annual Challenge Scholarship
- ALI - Art's Leadership Initiative
- ANFND - Annual Fund
- ATHLT - Athletic Scholarship
- CHAIR - Chair
- COLENG - College of Engineering
- CPTL - Capital Campaign
- CS - Career Services
- FALP - Eastman Arts Leadership Prog

Select Activities:

- 020 - Music Festival Volunteers
- 024 - Volunteer Guest Speakers
- 030 - Alumni Board Member
- 035 - Board of Trustees
- 040 - Past Presidents' Council
- 060 - Friends of the Library
- 070 - Friends of the Museum
- 080 - Gallery Patrons Committee
- 088 - ...

5. Decide what other groupings should shape the list

Contact List Solution (1.1) Ar evisions Argos

List Types Alumni Donors Giving Groups Inclusions/Exclusions Preview

Inclusion Options:

Do Not Limit by Inclusions

Limit by Inclusions

Exclusion Options:

Do Not Limit by Exclusions

Limit by Exclusions

Select Inclusions:

- AB - Advisory Board
- ADI - Annual Donor Gala Invitation
- ALM - Alumni Newsletter
- ANR - Annual Report
- ART - Art Museum Digest
- ATH - Athletics Updates
- BUS - Business/Education Forum
- CFA - Ctr for the Arts Footlights
- CGB - Course Guide Booklets
- CPS - Campus News
- DIR - Directions
- EDD - Educator's Digest

Select Exclusions:

- ALJ - Acknowledgement Spouse Credit
- AMC - All mail contact
- APC - All phone contact
- MLT - Mailing lists
- NML - Mail solicitation
- NPC - Phone solicitation
- NRE - Receipts
- PLT - Phone tree

6. Determine what other list criteria you want included or excluded

Contact List Solution (1.1)



List Types Alumni Donors Giving Groups Inclusions/Exclusions Preview

Populate Preview

Name	Banner ID	City	St...	Zip Code
Brigitte 'GiGi' Aachen	N00015...	Philadelphia	PA	19140
Andrew Adams	2100091...	West Chester	PA	19380
Eugene Victor Adams	EMP000...	University Park	PA	16802
Lester Adams	5625522...	Baltimore	MD	21210
Ms Wilma Addison	5100000...	Denver	CO	76855
Alan Aldan	N00010...	Rocheter	NY	14534
Mr. James Alfred	0003000...	Chicago	IL	60604
John Allen	5524332...	Baltimore	MD	21210
Mrs Elizabeth Allen	5100000...	Baltimore	MD	21216
Miss Frances Allen	N00013...	Baltimore	MD	21216
Mr Geoffrey Mark Allen	5100000...	Baltimore	MD	21216
Harold Allen	N00011...	Arlington	VA	22204
Kathleen Evans Allen	5100000...	Baltimore	MD	21210
Mary Allen	2002200...	Pittsburgh	PA	15260
Mr. Matthew Allen	5100000...	Baltimore	MD	21210
Hector Allyn	4429911...	Baltimore	MD	21210
Mr. Bob Anderson	4598763...	Missoula	MT	59812
Mr Bob Anderson	9000178...	Missoula	MT	59812
Mr. Bobby Anderson	3427540...	Columbia	MD	21044
Donor Anonymous	ANONY...	New York	NY	10001
Jane Appleseed	N00012...	Pekin	IL	61554
Jeremy Arizona	N00010...	Bellefontaine	OH	43311
Ian Armstrong	FACULT...	Melbourne	VIC	3052
Allen Arnold	N00012...	Columbus	OH	43227
Evelyn Asham	N00015...	Malvern	PA	19355
Rana Awada	N88665...	Toronto	ON	M4J 3N9
Anne Baker	AB123	West Chester	PA	19382
Andrew Barber	N00010...	New York	NY	10016
Gregory Bardel	FAC000...	Malvern	PA	19355
Mr. David Thomas Becker	7100038...	Philadelphia	PA	19147
Frank Thomas Becker	6105787	Philadelphia	PA	19147

354 items

7. Get your list results!

About Evisions Professional Services

Evisions Professional Services will help you reach and maximize your institution's administrative goals and objectives. They address all your processes, people, and needs, then tailor their approach to those goals and objectives. Whether it's through consulting, development, or training, Professional Services will help you get the most out of your Evisions experience.

What customers are saying about Professional Services



"We had an idea for a data extraction solution for our end users, but needed Evisions help to develop it. They worked with us to create a solution for an Advancement contact list that is saving time in multiple offices. We really appreciate the partnership with Evisions to provide strategic solutions for our institution."

Cindy Fox

Director of Advancement Services

The Principia



"We have been using Evisions for years and have had nothing but success. We have been extremely satisfied with the customer & technical services and all of our needs have been met in a timely and effective manner."

Dan St. John

City College of San Francisco

To see how Professional Services
can help your organization
work better, please visit
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Evisions helps higher education organizations work better. Our software eases your administrative load – so you can get back to the process of learning and discovery. Built and optimized for administrators, our solutions help you stay on top of your many tasks and responsibilities, reduce hassle and waste, and work more efficiently.

07-0014-0417