General Information:

www.asana.com

ASANA is used to manage the scheduling of prospects and trips for the President of the College or the Vice President of Institutional Advancement. It is a cloud based software, so that members can access real-time information anywhere (with an internet connection). Our current projects within ASANA include trips (arranged by month/year), KJ Prospects (for prospects on KJ's radar and should be scheduled), MSC Prospects (for prospects to schedule for MSC), HOLDING AREA (for prospects who aren't critical to schedule, but could be used for filler appointments), General Information (which holds guides, templates and uses for ASANA).

Projects:

A. By Date (ex. June 2015 Appointments)
   These projects will be created when travel for MSC or KJ have been confirmed or are in the process of being confirmed. If dates are available for travel, it will be noted with location as TBA. Otherwise, naming convention will be:
   mm/dd – mm/dd: City, State

B. Potential Appointments (ex. MSC Appointments & KJ Appointments)
   These projects are used as a holding place for potential visits that can be scheduled for MSC or KJ.
   • To avoid duplication, please keep the list alphabetized.
   • Before adding a new prospect, do a search to see if the prospect has previously been added. *See Prospect Maintenance for more instructions.*

Business Rules:

• AVP will maintain the calendar of travel for both MSC & KJ. New dates and projects will be added as information is shared with AVP.

• Once a new travel date is confirmed, details about the trip will be located in the description area.

• Prospect Maintenance:
   o Prospects can be added by any member of the IA Team. The focus should be high level prospects that require a meeting between MSC or KJ.

- o Enter names as First & Last Name as the Task. Include class year if the prospect is an alumna.

- o Tags should include the nearest city the person resides or works.

- o In the description area, the following information should be added:
  - ▪ Banner ID
  - ▪ Company Name (if available)
  - ▪ Spelman Connection (brief description of the Spelman connection)

- o If research is needed, add a subtask with the text "Research Requested." Please assign this to the research team and add a due date. Note: Research requests should be made two weeks in advance.

- o When profiles are complete they will be attached to the prospect's record.

When working with Projects by Date:

- o Two sections will be created for each trip:

  - ▪ CONFIRMED – for appointments which have been confirmed.

  - ▪ PENDING – for appointments where contact has been made and we are awaiting confirmation or contact will be made.

- o Fundraisers may or may not be assigned to a prospect.

- o The comments section should be used to document any action, response, outreach, communication, new information etc. that pertains to this prospect. This information will later be used as a Contact Report.

- o When an appointment is confirmed details on location, date and time should be captured in the description area AND also as a comment (for timestamp purposes)

- o Confirmed appointments should also set the appointment date as the due date.

- o Be sure to request or review profiles attached to the record.

Procedures:

1. Trip details are confirmed and updated in ASANA.
2. Fundraiser can view the MSC Appointment List/KJ Appointment List and move them to the appropriate month the trip is confirmed. (i.e. If MSC confirms a trip to Chicago in July, the project July 2015 Appointments will be added with the location Chicago, IL. Fundraisers can then check the MSC or KJ Prospect Lists and look for any Chicago prospects and move them from the MSC/KJ Appointments Project to the July 2015 Appointments project.
3. All names should be in PENDING status. As outreach is made, comments should be updated.
4. OAS should check the PENDING list as a pool of people where research will be needed.
5. As appointments are confirmed, the word CONFIRMED will be added, the due date will be changed, and the description & comments will include details on the appointment location.
6. OAS can add the bio profile to the appropriate record.
7. After the trip takes place, PENDING names will be moved back to the appropriate project (MSC Appointments or BDT Appointments) for future trips with documentation about the outreach. Contacts will be added to Banner to document the interactions and outcome.
8. Projects by date will be archived once all documentation has been made in Banner and prospects are moved to their appropriate holding area.

IA Roles:

Paulette/Erika:

*   Point person to complete the full briefings for the entire trip.
*   Must ensure that all appointments are confirmed with Naima and placed on KJ's Calendar. This should take place on an ongoing basis. Additionally, will schedule meetings through Naima for KJ to be briefed on the trip (prior to her departure) and after trip (for follow-up).
*   Must ensure (through Naima) that Yvonne Jackson (or President's Office) can share details about MSC's travel logistics.
*   Will work with lead fundraiser to ensure the bio/research for the appointment is complete.
*   Ensure the number of media packets are available and ready shipment.

Fundraisers:

*   Schedule appointments for MSC/KJ's behalf.

- Confirm as appointments are finalized, they noted in ASANA as soon as possible. This includes moving them to the CONFIRMED area (or creating one if it doesn't exist) and documenting the meeting details in the comments area.
- Keep comments updated to share status of all appointments. Specifically, when outreach is made (via email, phone, etc.)
- Ensure that OAS has the request for the type of research needed for the appointment.
- Review the final briefing document prepared by Paulette/Erika.

Research Team:

- Periodically review the names on the MSC Appointments/KJ Appointments project to see if there are names where research is needed.
- Add new names to the MSC/KJ Appointment projects and add location tags for future scheduling. We should review the Stewardship Plan to ensure that leadership level donors are added to their appropriate holding area (either MSC Appointments or KJ Appointments).
- Document any pertinent highlights in the comments section for the prospect.