

# Strategy Notes Guide

The prospect strategy should include any relevant and significant information that moves the prospect toward further engagement with UVA. The team lead develops the strategy note in coordination with team members. The team should review and update prospect strategies on a regular basis.

## Strategy Importance: Why?

- Provides direction and action
- Portfolio Prioritization
- Identifies and documents next steps
- Tracks Progress

## Responsibility: Who?

- The Team Leader is responsible for developing and documenting a strategy for and managing the University's overall relationship with the donor or prospect. TL consults and communicates with the Prospect Management Team regularly, in developing and updating strategy and planned activities.
- Team Members are responsible for actively participating in prospect strategy development and actively following and executing the agreed-upon plan on behalf of the University.

## Strategy Note Outline and Description: What?

- Prospect Summary: A brief overview of the relations and why the prospect/donor is engaged with UVA.
- Interest Areas: Describe prospects passion, known or potential interest at UVA, including spouse interest areas. For prospects with a team, team leads are responsible for developing and incorporating other team members' plans and engagement for an overall prospect strategy.
- Obstacles: What may prevent or stall the prospect from moving forward through the donor lifecycle
- Strategic Moves: Consider how to move the prospect toward the next stage. What will happen over the next year or over the next 3 years? Describe the timing and amount for the next solicitation and enter a proposal in the system.
- Key Relationships: Who else within the unit or which leadership needs to be involved.
- Next Steps: What is the immediate next outreach and engagement with the prospect.

## Where?

- EverTrue Interactions - job aid
  - **Only enter strategy note interactions in EverTrue**
- Advance - only to look up prospect strategy note

