

MONTHLY MAINTENANCE CHECKLIST

IDENTIFY NEW PARTNERS

- SEARCH THROUGH SOCIAL MEDIA FOR POTENTIAL PARTNERS
- ASK CURRENT PARTNERS TO CONNECT YOU WITH ANY REFERRALS THEY HAVE
- SEND A THANK YOU NOTE
- ADD THEM TO YOUR NEWSLETTER

CHECK FOR LAPSED PARTNERS

- IDENTIFY ANY MISSED GIVING OR DECREASES IN GIVING
- CONTACT YOUR ORGANIZATION TO VERIFY IF IT WAS A CREDIT CARD ISSUE
- SEND A COMMUNICATION TO THE PARTNER WITHIN 2-3 DAYS

REVIEW CURRENT PARTNERS

- LOOK FOR ANY CHANGES IN GIVING AMOUNT
- IDENTIFY ANY PARTNERS WHO MAY BE READY TO INCREASE GIVING
- SEND A THANK YOU IF THERE WAS AN INCREASE
- UPDATE ANY CONTACT INFORMATION AS NECESSARY

LARGE DONATION PARTNERS

- VERIFY THAT ANY LARGE ANNUAL GIFTS YOU EXPECT TO RECEIVE THAT MONTH HAVE BEEN PROCESSED
- SEND A THANK YOU NOTE

SCAN FOR
MORE HELP



FREE ASSESSMENT