

Strategy Planning Toolkit Preparation Guide

Creating a Turnkey Donor Journey for MGOs

To move the needle on fundraiser efficiency, advancement leaders must provide a clear donor path for MGOs. Best-practice shops provide direct steps from qualification to gift, instead of relying on MGOs to determine next steps throughout the process.

Without guidance MGOS struggle to identify tangible next steps in the cultivation process. They re-create the same strategy for every prospect, creating one-time-use, customized collateral at every turn.

The Advancement Forum created the Strategy Planning Toolkit to help advancement leaders empower MGOs to focus more time on tailoring their strategy rather than re-building the basic components of a donor journey. Consider creating a central donor journey toolkit and/or unit-based versions depending on the needs of your team.



Who can create this?

Leadership (CAOs, VPs of advancement, and Directors)



When to complete this

Before a campaign or when its convenient. Continue to make changes to the toolkit as needed.



What you need

Marketing collateral used during each phase of the cultivation process.

Tool Kit Checklist

1

Designate a team leader to coordinate toolkit completion

Choose one team member to lead the toolkit completion and own the toolkit moving forward. This will ensure consistency as changes are made. Once a team leader is chosen, **pass the remaining portion of this checklist to them.**



Complete the roles and responsibilities table and discuss the tool kit with your team

Schedule time with those who have a grasp on the MGO experience. It may be helpful to include MGOs while brainstorming for each phase. Find the roles and responsibilities table on the next page ➡



Fill out the Excel template and gather collateral

Begin filling out the template by slotting in resources your team gathered into a central location (such as a file folder). Make sure to provide a link to the resource to ensure quick access for MGOs.



Train MGOs on how to use the new resource

Maximize toolkit use by hosting a training for your team to walk them through how to use the toolkit and where to find the collateral listed in the toolkit.



Give the toolkit a home

Designate an anchored location for the toolkit (more permanent than an email attachment). For example; in a folder on a shared drive, or as a download in a shared system.

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2 Complete the roles and responsibilities table

Schedule time with those who have a grasp on the MGO experience to fill out the table below. It may also be helpful to include a few MGOs while brainstorming collateral for each phase.

Roles and Responsibilities

Task	Owner(s)	Due Date	Notes
Team Leader			<i>Organizes and assigns tasks to complete the excel template</i>
Phase 1			<i>Completes the phase 1 tab of the template and gathers the collateral for phase 1</i>
Phase 2			<i>Completes the phase 2 tab of the template and gathers the collateral for phase 2</i>
Phase 3			<i>Completes the phase 3 tab of the template and gathers the collateral for phase 3</i>
Phase 4			<i>Completes the phase 4 tab of the template and gathers the collateral for phase 4</i>
Phase 5			<i>Completes the phase 5 tab of the template and gathers the collateral for phase 5</i>
Phase 6			<i>Completes the phase 6 tab of the template and gathers the collateral for phase 6</i>
Consolidator			<i>Collects completed phases and collateral from contributors and synthesizes into one template</i>
Staff Trainer			<i>Trains MGOs on how to use the toolkit and collateral</i>