

## Capital Campaign

As much a necessity as a case statement, a solid plan is the foundation for the success of your capital campaign. ClearView CRM offers a broad scope of capabilities that streamline the planning and implementation of a your campaign, helping you easily identify and solicit donors with histories of support and engage new donors.

### Identify and engage constituents.

- Personalize communications with donors
- Identify and recruit potential campaign leaders
- Stay connected to donors with email communications
- Find prospects through wealth screening integrated with ClearView CRM
- Import demographic research on potential donors

### Develop and implement a strategic capital campaign plan.

- Create a budget and plan for your capital campaign
- Manage all campaign-related fundraising activities
- Integrate events into your capital campaign with event management tools
- Track and manage contact histories to cultivate donors effectively
- Offer donors gift opportunities and premiums

### Easily and automatically manage all campaign-related activities.

- Establish employee gift matching plans
- Track specific naming opportunities
- Understand quickly and easily the status of proposals
- Transfer appointments to your calendar
- Set up and track multi-year and one-time pledges and associated payments
- Create pledge reminders and pledge billings
- Establish automated payments via electronic funds transfer and credit card billing
- Track pledges with open pledge-receivable reports
- Categorize pledges by motivation, fund or campaign
- Attach important electronic documents to donor records
- Record detailed budget information to allow for comprehensive reporting

### Related ClearView CRM Tools

- Event Management
- Opportunities Management and Major Gift Cultivation
- Reporting and Analytics
- Volunteer Tracking
- Prospect Research

For more information, contact SofTrek at 800.442.9211 or [sbirnbaum@softrek.com](mailto:sbirnbaum@softrek.com).