

Opportunities Management and Major Gifts Solicitation

Confidently manage the opportunities for raising funds for your organization, including the highly individualized process of developing major gifts. With ClearView's opportunities management function, you can identify appropriate donors, and track, manage and analyze your solicitations in progress.

Discover the best opportunities.

- Identify donor prospects with the integrated WealthEngine wealth screening tool
- Get immediate updates to prospects' and current donors' giving potential

Readily view and use donor information, giving history, research results and outside data.

- Create a personalized dashboard that contains donor, giving, active proposals and other relevant information
- Monitor return on investment, donor retention, performance of vendors, proposals and segments, and other key measures

Implement, track and report on your solicitation program, including major gifts and grant requests.

- Track and view all contact histories, including meetings, phone calls, emails, letters, event attendance and more
- Schedule follow-up activities automatically
- Get notifications on milestone dates and events
- Assign primary and secondary solicitors to each major donor.
- Easily generate custom mailing and solicitation lists
- Print detailed reports that track the dates and status of grant requests.
- Create annual income projections for multi-year grants

Related ClearView CRM Tools

- Direct Mail Marketing
- Email Marketing with Constant Contact
- Wealth Screening with WealthEngine
- Reporting and Analytics

For more information, contact SofTrek at 800.442.9211 or sbirnbaum@softrek.com.