A.8 HOW TO ADD A PLAN

A plan should be entered from the “Plans” subtab under a constituent’s Prospect tab (4.1).

Note: You will always select “Add major giving plan” when adding a new plan. The plan type (Major Giving, Leadership Annual, Stewardship, etc.) will be selected on the next screen.

A.8.1 How to Enter Plan Details

Once you have clicked “Add major giving plan,” enter all pertinent plan details on this screen. The yellow highlighted fields are required.

Provide a concise and descriptive name for your plan. Always begin plans with your unit’s official naming convention. For example: “CDMG – Need Based Scholarship”

Your narrative should provide detailed information about your strategy as well as timing and purpose for the gift.

Remember to enter any spouse, relative, company or foundation that is associated with your prospect if they will be integral to your plan.
A.8.2 Example of a Proper Narrative
A plan narrative should provide an overview of key cultivation and solicitation components and include a biographical sketch, information about capacity and inclination, and a strategy statement (5.1).

Example: “John Doe is a high profile ’90 Franklin grad based in Atlanta (with properties in Italy, Belgium, and the Cayman Islands) who participated in the Cortona study abroad program. He mentioned in a Forbes article that his experience there inspired him to start his company, Study Tourists, a technology company catering to parents with students abroad. Services include rental of tablets and international phones, as well as a secure app that students and parents can use to check in and provide location updates. John has expressed interest in providing scholarship support to Franklin for students interested in international technology, but he has mentioned that his wife is not on board just yet. I plan to cultivate John and his wife for a $3M gift by the end of FY19, and will coordinate with Jeremy Ransom in Principal Gifts.”

A.8.3 How to Add Steps
To add steps to a plan (5.2), you will need to click on the “Steps” tab next to the “Details” tab on the plan entry screen.

A.8.4 Adding a Single Step
To add a single step to a plan you will need to simply fill in the fields on the first line. At minimum, you will need to include Expected Date, Objective, Owner, Stage, Status (Note: each plan needs at least one Pending step, so if you only have one step, its status should be Pending), and Contact method.
A.8.5  Adding Steps from a Template

There are several templates in GAIL that provide steps and timelines for different types of plans. If you would like to use one of these templates as a guideline for your plan, simply select the specific template from the drop-down menu and click the “Add steps from plan outline” button. Remember that you must change the status on the first step to “Pending.”

Select the appropriate plan outline

Remember to change the status of the first step to “Pending.”