

Sample Activity Tracking Template

All the short codes begin with PG, so you can query using your CRM's wildcard. For instance, querying for PG* (where * is your wildcard), will give you all the people with Planned Giving codes.

The two Prospect categories (Top Prospect & Tier II Prospect), start with PGP. So if you want to find all your Planned Giving prospects, query for PGP*. (Using your wildcard, of course.)

If you want only your Tier II prospects, search for PGPT2.

The Interest codes all begin with PGI. That allows you to find everyone who has expressed interest by searching for PGI* in your database.

The Information Request codes all begin with PGIR. That way, you can query for all the prospects who have requested info, using PGIR*. If you want only those who have requested info via your digital newsletter, you'd search for PGIRND.

Recognize that over time, people will have multiple codes as they progress in your program. You'll start by giving them a Prospect code, PGPT or PGPT2.

From there, an ideal relationship would start in the Planned Giving Interest category, with PGWCI (would consider including in will), or PGLKM (like to know more about including in will). Then your prospect might progress to the Information Request category: Maybe PGIRNP (information request from your print newsletter), or PGIRE (information request from email). Ultimately, PGRSM, when they become a member of your recognition society.

This template gives you a perfect start. Over time, adapt it as your program matures.

Category: Planned Giving Top Prospect

<u>Description</u>	<u>Short Code</u>
Prospect, Top	PGPT

Category: Planned Giving Tier II Prospect

<u>Description</u>	<u>Short Code</u>
Prospect, Tier II	PGPT2

Category: Planned Giving Interest

<u>Description</u>	<u>Short Code</u>
Interest-Would Consider Including in will	PGIWCI
Interest-Like to Know More about including in will	PGLKM

Category: Planned Giving Information Request

<u>Description</u>	<u>Short Code</u>
Information-Request- Newsletter Print	PGIRNP
Information-Request- Newsletter Digital	PGIRND
Information-Request-Direct Mail	PGIRDM
Information-Request-Email	PGIRE
Information-Request-Annual Appeal reply	PGIRAA
Information-ReFerral (someone referred the person to you)	PGIRF
Information-Request-Other	PGIRO

Category: Planned Giving Recognition Society Membership

<u>Description</u>	<u>Short Code</u>
Recognition Society Member	PGRSM

Category: Planned Giving Preference

<u>Description</u>	<u>Short Code</u>
Do Not Mail	PGDNM
Do Not Email	PGDNEM