Prospect Plan Report

Job Aid

WHEN TO USE THE PROSPECT PLAN REPORT

The Prospect Plan report is a tool for pulling prospect plans. This report returns all assigned or unassigned plans, based on chosen inputs. Report inputs include: Plan Manager, Plan Type, Unit, Department, Region, and State, along with options to include historical plans and Excel-ready formatting. The Report returns all plans for which the Development Director is assigned as Primary Plan Manager or Secondary Plan Manager.

Development officers can use the report to pull their cultivation portfolio (assigned plans) or qualification prospects (unassigned plans for a particular site). The report outputs a number of useful fields—from demographics and contact info to capacity and likelihood—to help Development manage their activity and workflow.

The report can be exported into Excel for easy sorting and filtering, and can be viewed as a PDF or in ABE.

WHAT IS INCLUDED IN THE PROSPECT PLAN REPORT

The Prospect Plan report outputs assigned or unassigned prospect plans, including but not limited to the following fields:

Lookup ID	This is the unique ID used in the ABE CRM system. The report includes a hotlink that will redirect you to the constituent record in ABE CRM. ABE CRM login is required.
Prospect Status Code	Indicates whether a prospect has been coded as one of the following VIP groups: Chancellor's Prospect – Level 1, Level 2 or Qualification, WFAA Board Member, Van Hise Society Member, Principal Gift household. Check out Connect for more information.
Household Total Giving Amount	This is based on the WFAA standard definition for Household Giving, which reflects recognition credit and includes gifts, pledges, deferred gifts, and informational gifts, as well as gifts from companies, foundations, and donor-advised funds that are soft credited to an individual in the household. "Household" is defined by the current spousal relationship.
Disqualified for Site	Outputs the site for which a Research and/or Development Disqualification note is applied and is active (not end-dated in the past). The site of WFA - Wisconsin Foundation and Alumni Association encompasses all UW sites and indicates a prospect has been disqualified for the entire organization. If several disqualifications have been made for a constituent, these sites will be listed in alphabetical order.

	See the Disqualification area on Connect for more details about how to apply a Disqualification to a constituent.
Prospect Manager	If a Prospect Manager exists for the prospect, the name will be displayed here; otherwise, the report will return an output of 'unassigned'.
Primary Plan Manager	The full name of the development officer assigned in the Primary Plan Manager role; since the report outputs plans for both primary and secondary plan manager roles, in some cases this **may not** be the 'Plan Manager' originally selected as an input.
Secondary Plan Manager	The full name of the development officer assigned in the Secondary Plan Manager role; since the report outputs plans for both primary and secondary plan manager roles, in some cases this **may** be the 'Plan Manager' originally selected as an input.
Historical	Returns a 'Y' value if the plan returned is historical (i.e. not active); however, a 'Y' can only be returned if the user has selected 'Yes' to "Include Historical" as an initial input. No value is returned if the plan is active.
Other Assigned Plans Flag	Returns a 'Y' value if the prospect has additional plans to which other Development officers are assigned as a plan manager. No value is returned if other assigned plans do not exist.
Plan Type	This is the name of the plan type, such as Major Gift, Leadership Annual Gift, or Gift Planning. The Plan Type provides quick insight into the type of development activity happening on the plan. See Research & Prospect Management's Plan Type overview for more information.
Plan Name	This is the name of the plan itself, e.g. EGR BRADG/RUSSSA Gift Planning or MED GILLIANF Major Gift; all plan names follow a similar syntax: [SITE] [DOD/QUAL/BLANK] [Plan Type]. See Research & Prospect Management's Plan Names overview for more information.
Plan Group	While uncommon, the plan group feature allows DoDs to view plans with specific attributes associated with a WFAA initiative – i.e.: "Legacy Project" or "LET A-Rated Project." Selecting **All Plans** allows you to see all activity on plans with the attributes you select.
Opportunity Status	If an Opportunity exists on the plan, the status of that Opportunity will be displayed here; otherwise the field will be blank. Possible outputs include: Accepted, Response Pending, Rejected, Qualified, and Canceled.
Create Date	The date the plan was created.

Research Identification Note	If the prospect was identified by Research, the rationale and background for the identification will be included here. Once exported into Excel, a user could filter on this field, for example, to find only those prospects and associated plans that have been specifically identified by Research.
Site	The site attached to the plan, e.g. EDU – Education; this field will return “multiple (x) ”, where X is the number of sites, when more than one site is attached to a prospect plan.
Last Completed Step Date	The date of the most recently completed step on the plan; if no date is returned, no past step exists on the plan.
Completed Step Contact Method	This is the contact method for the most recently completed step on the plan; outputs include but are not limited to: Email, Phone Call, Personal Visit, Letter, Group Visit
Last Contact By	The owner of the last completed step
Next Expected Step Date	The date of the next step on a plan; if no date is returned, no future step exists on the plan.
Next Step Contact Method	This is the contact method for the next step on the plan; outputs include but are not limited to: Email, Phone Call, Personal Visit, Letter, Group Visit
Next Contact By	The owner of the next plan step.
Address, Email, Phone	Returns the “primary” version of each type of contact information.
Region	The geographic region as defined by their address and the ABE regional definition. ABE regions do not cover all constituent addresses, so, for further refinement, the user may choose a particular state and select ‘ALL’ for Regions.
Ind. GCR	Returns the Individual Gift Capacity Rating, which is based on a prospect’s ability to gift of a certain size, payable over a five-year time frame. See Research & Prospect Management’s Capacity overview for more detail.
Ind. LAG Likelihood Rating	Returns the predictive model score that indicates a prospect’s likelihood to make a leadership annual gift. See Research & Prospect Management’s Likelihood overview for more detail.

Ind. MG Likelihood Rating	Returns the predictive model score that indicates a prospect's likelihood to make a major gift. See Research & Prospect Management's Likelihood overview for more detail.
Ind. PG Likelihood Rating	Returns the predictive model score that indicates a prospect's likelihood to make a planned gift. See Research & Prospect Management's Likelihood overview for more detail.

HOW TO GENERATE THE PROSPECT PLAN REPORT

1. Log in to ABE CRM
2. On the navigation bar, click **WFAA Reports**
3. Click the **DEV – Prospect – Prospect Plan** report
4. If necessary, select the applicable **Plan Group –** To see all plans, select "**All Plans**" (most plans do not have a Plan Group associated with them)
5. Select **Plan Manager** (choose **assigned** for your cultivation portfolio; choose **unassigned** for qualification prospects.)
6. Select **Prospect Plan Type**
7. Select **Unit**
8. Select **Department** (leave as default, ALL – All Departments, if not applicable)
9. Select **State** (if you choose a state, choose ALL for **Region**)
10. Select **Region** (if you choose a region, choose ALL for **State**)
11. Select **Include Historical** (for **assigned**, choose 'Yes' only if you want old plans included; for **unassigned**, always set to 'No')
12. Select **Excel Ready Formatting**
13. Click **View Report**