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Research Management

With the prospect research features available you can manage prospect research requests, identify important data, manage research groups, and use analysis tools to determine who, and how much, to ask for a gift. You are also able to track wealth indicators, modeling and propensity, and wealth capacity for your prospects.

- Add and manage prospect research requests.
- Navigate the My Prospect Research page.
  - Designate open research request “in progress”, “as complete”
  - Reject an open research request
- Open individual requests
- Completed requests tab
- Adding notes to a research request
- Access the Wealth and Ratings Page
  - View model scores, wealth summary tabs
  - Add and edit assets, giving and affiliations
- Add and manage research lists.

Prospect Research Requests

The prospect research request tools allow you to submit a prospect research request, designate the search for constituents or a research list, enter request information, and track results. The purpose of the Prospect Research Request is to receive and organize the research requests submitted by fundraisers.

My Prospect Research Page

The Prospect Research page allows you to manage research requests that have been assigned to you.
To Access the Prospect Research Page:

1. On the navigation bar, click **Prospects**.
2. In the **Prospect research** task group, click **My prospect research page**.

Open Requests

The **Request Queue** tab of the **Prospect Research** page displays all outstanding requests.

One research request per one individual or organization (with the exception of spouses only)

On the **Request Queue** tab, you can

- Assign researchers to open research requests.
- Designate a request as “In Progress.”
- Designate a request as “Complete.”
- Reject open research requests.
Research Management

To Assign an Open Research Request:

1. On the navigation bar, click **Prospects**.

2. In the **Prospect research** task group, click

3. Select the **Request Queue** tab.

4. Click the expand icon to the left of the request

5. Click **Change status** in the frame that appears beneath the request, and then select **Assigned**.

Search for and select the researcher who will execute on the request

To Designate an Open Research Request as “In Progress”:

6. On the navigation bar, click **Prospects**.

7. In the **Prospect research** task group, click

8. Select the **Request Queue** tab.

9. Click the expand icon to the left of the request to designate as “In Progress.”

10. Click **Change status** in the frame that appears beneath the request, and then select **In Progress**.
To Designate an Open Research Request as “Complete”:  

1. On the navigation bar, click **Prospects**.
2. In the **Prospect research** task group, click the **Request Queue** tab.
3. Click the expand icon to the left of the request to designate as “Complete.”
4. Click **Complete request** in the frame that appears beneath the request.
5. When prompted, click **Yes**.
6. When research is complete the status will change to Completed and the final product will be sent to the requester via email and be attached to the constituent documentation tab of the Constituent Record. Event bios will be attached to the documentation tab within the event.

To Reject an Open Research Request:  

1. On the navigation bar, click **Prospects**.
2. In the **Prospect research** task group, click the **Request Queue** tab.
3. Select the **Request Queue** tab.
4. Click the expand icon to the left of the request to reject.
5. Click **Reject request** in the frame that appears beneath the request.
6. In the **Reason** field, select the reason for rejecting the request.
7. In the **Comments** box, enter any additional information.
8. Click **Save**.

A call or email will be made when a request is rejected

**Completed Requests**

Once all individuals included in a main request are complete, the request containing these individuals displays on the **Completed Requests** tab.

Once the Research Request has been completed, the researcher will send an email stating the completion along with all the documentation. This documentation will also be found in the constituent documentation tab of the Constituent Record.

If the request is rejected, the Research Manager will contact the requester to discuss
Add Constituent Documentation

For a research request, all documentation will be stored in the Constituent Document of the Constituent Record. (Not to be mistaken for the Research Request record documentation)

1. Open the Constituent record that you would like to add your research documentation to.
2. On the Documentation & Interaction tab, select the Constituent Documentation second tier tab.
3. Select the Add attachment option and select the documentation you wish to add to the record.

Prospect Status

In the case where Research has identified that a constituent is flagged as a potential Prospect. The Research team can flag the Prospect status as “Identified”

1. Go to the Constituent Record
2. From the Personal Info, go to the Constituencies second tier tab
3. Click the Add and select the Prospect constituency
4. The Constituent record should now have a Prospect Tab and have a Prospect Constituency.
5. From the Prospect tab, go to Edit prospect status

6. Select the status of identified

Wealth and Ratings

Once you have gathered research on a prospect, you enter the data onto the prospect’s Wealth and Ratings page. You can enter a variety of wealth-related information, including real estate, stock, pension, and salary.
To Access a Constituent’s Wealth and Ratings Page:

1. Open the constituent record.
2. On the explorer bar, click **Wealth and ratings**.

Wealth information is arranged in a series of tabs that categorize the data collected. The following table identifies the tabs and provides a description of each.

<table>
<thead>
<tr>
<th>Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Wealth Summary</strong></td>
<td></td>
</tr>
<tr>
<td>Wealth summary frame</td>
<td>Summarizes all data contained on the Affiliations, Assets, Biographical, and Giving tabs in an organized, easy-to-read format.</td>
</tr>
<tr>
<td>Giving capacity frame</td>
<td>Displays general information about the constituent’s wealth capacity, including the formula used to determine the capacity.</td>
</tr>
<tr>
<td>Research details frame</td>
<td>Displays research status, prospect manager, and a research summary. The research summary is a free text field where the researcher can write a summary of the research results for the prospect.</td>
</tr>
<tr>
<td>Tab</td>
<td>Description</td>
</tr>
<tr>
<td>-----------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Model Scores</td>
<td>Contains an integrated analytics tool that helps identify prospects most likely to give a gift to your organization. It helps your organization predict actions including planned and recurring gifts, membership renewals, and which constituent will become a major donor.</td>
</tr>
<tr>
<td>Assets</td>
<td>Houses real estate, business, securities, and other asset ownership information, in addition to income and compensation data and wealth indicators.</td>
</tr>
<tr>
<td>Giving</td>
<td>Houses the prospect's giving information, such as donations to your organization, philanthropic gifts to other organizations, and political donations.</td>
</tr>
</tbody>
</table>
### Research Management

<table>
<thead>
<tr>
<th>Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Affiliations</strong></td>
<td>Houses information about the prospect's non-profit and foundation affiliations, in addition to network connections and constituencies.</td>
</tr>
</tbody>
</table>

| Biographical Information  | Houses personal information, such as name, marital status, and gender; along with contact information, relationships, interests, and education. |

### Manage Custom Ratings

The use of a propensity-to-give ratings model to track constituents and their likeliness to make a gift, you can be recorded in the individual constituent records.

#### To Manage Custom Ratings:

1. Open the constituent’s **Wealth and Ratings** page.
2. Select the **Model scores** tab.
3. On the action bar, click **Add**.
4. In the **Category** field, select a category from the list.
5. In the **Value** field, enter a value for the attribute.
6. Enter start and end dates in the corresponding fields.
7. In the **Comments** field, enter any additional information about the attribute.
8. Click **Save**.
Research Lists

Research Lists help you effectively research potential prospects. Research Lists are groups of individual constituents, and the list can be static or dynamic, depending on what you select when you create the list.

To Access the Research Lists:

1. On the navigation bar, click Prospects.
2. From the top of the Prospects page, in the Research Lists section, click View all lists on the action bar.

Add a Research List

When you add a research list, you must enter select the criteria you want to build the list, you could also create your list from a selection that was created in Query.

This will only be used for individual list requests
To Add a Prospect Research List:

1. From the top of the Prospects page, in the Research Lists section, click Add.
2. In the What is the criteria for creating your lists? section, select the fields to base your lists on.
3. In the Do you want to further narrow your lists? field, select or create a selection to base your list on.
4. Click the Calculate total prospects button to see how many prospects satisfy your criteria.
5. Complete the fields in the Save options section:
   a. Enter a name and description for your list.
   b. Mark the checkboxes to allow other users to access and edit the list
   c. Mark the Allow this list to be refreshed checkbox to allow the list to automatically update with new prospects that meet the list criteria.
6. Click Save.

Edit a Research List

After you create a list, you can edit the Research list to change the criteria, selection, name and description and add new members.
To Edit an Existing List:

1. On the navigation bar, click Prospects.
2. From the top of the Prospects page, in the Research Lists section, click View all lists on the action bar.
3. In the name column, click the linked list name you wish to open.
4. On the action bar, click Edit.
5. Make any necessary changes on the Edit research list window.
6. Click Save.
7. On the Update list window, determine how you want to update your lists.
   a. To add prospects to the existing list, select Only add prospects to the existing list.
   b. To build a new list, select Rebuild the list entirely based on new criteria.
8. Click OK.

Add Member to an Existing List

After you create a list, regardless of the method or criteria used to populate the group, you can add individual members, even members who do not satisfy your original group criteria.

To Add Prospects to an Existing List:

1. On the navigation bar, click Prospects.
2. From the top of the Prospects page, in the Research Lists section, click View all lists on the action bar.
3. In the name column, click the linked list name you wish to open.
4. On the action bar, click Add member.
5. In the Constituent field, search and select the constituent to add.
6. Click Save.