

Relationship Manager: Mary S.
 Month: July 2014
 Date Submitted: August 1, 2014

THE GREEN SHEET THE SALES DASHBOARD

\$UCCESS = THINK BIGGER!

\$UCCESS = The number of times we **Share the Story** and **Present The Opportunity**

\$UCCESS = ACTIVITY & PRODUCTIVITY

\$UCCESS = Number of VISITS (with Qualified Prospects) + Number of 'ASKS'

\$UCCESS = RESULTS = GIFTS (MONEY to FUND the VISION.)

\$UCCESS = RETURN ON INVESTMENT + RETURN ON ENERGY + RETURN ON RELATIONSHIPS

THIS MONTH

ACTIVITY			
VISITS (PERSONAL)		ASKS (Present The Opportunity)	
# of Top 33 Visits	3	# of Asks (Re: # of Visits)	2
# of Total Visits	9	\$ Amount (Requested/ On The 'Table')	\$65,000
		# of Leadership Circle (Invited to Join)	4
		# of Legacy Requests	1

MAXIMIZE THE RELATIONSHIP... AT THIS GIVEN MOMENT!

TRUST THE ENGAGEMENT TOOL.

JUST ASK!!!

PRODUCTIVITY/RESULTS	
# of Commitments	3
\$ Committed Note: Measure increase in giving per prospect . <i>E.g.</i> , \$1,000 to \$10,000; \$10,000 to \$100,000.	\$43,000
# New Leadership Circle	1
# New Legacy Society	1
\$ Value Of Planned Gifts	
#/\$ Pending (Legitimate Follow Up)	\$810,000
# Declined	2

Partial List of Recent Pipeline Activity Notes (CONFIDENTIAL)

Joe Miller	Supposed to hear back in Sept. w/final decision
Big Retail Store	Moved to 'Declined'
Smith Family	Proposal for \$20K (verbal) to submit in August
Theresa S.	Agreed to 'Leadership' conversation at \$100K+
Company 2	Commit for \$10K. Leadership working on \$40K+ added by EOY
Wilson B.	Discovery visit, qualified for Leadership conversation at \$100K+
Theresa Y.	Agreed to see us in fall. RM: Joe Morgan
Company 3	Needs follow-up from Connector. Not hearing back from.