Outreach Management Tool

MIT Alumni Association | Quick Start Guide

Table of Contents

Introduction

The Outreach Management Tool is a streamlined way for alumni volunteers to manage their fundraising and event outreach to fellow classmates and peers. If you are experiencing difficulty accessing the Outreach Management Tool, please contact your staff liaison.
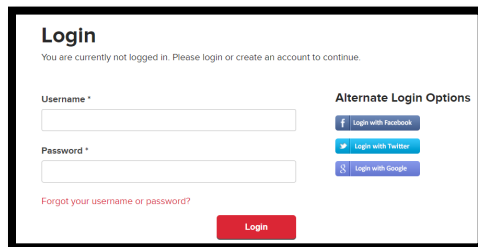
What can you do with the Outreach Management Tool?

- ✓ **Select** prospects to contact for the current fiscal year.
- ✓ **Retrieve** prospect information including contact information and MIT involvement.
- ✓ **Record** the results of your outreach as well as any notes for future reference.
- ✓ **Track and Monitor** your personal progress of the prospects you've selected and the campaign's progress.

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Getting Started

➢ Login

1. To access the Outreach Management Tool, please log in here: https://alum.mit.edu/engagement/user/home. A link to the Outreach Management Tool can also be found on the Volunteer Knowledge Base.
2. To log in, please use your Infinite Connection Username and Password.

➢ Privacy Policy

The information you will have access to view within the Outreach Management Tool is confidential. You will be required to agree to an electronic privacy policy to gain access to the Outreach Management Tool.

➢ Finding a Campaign

To find a campaign, click on "My Campaigns" within the navigation.
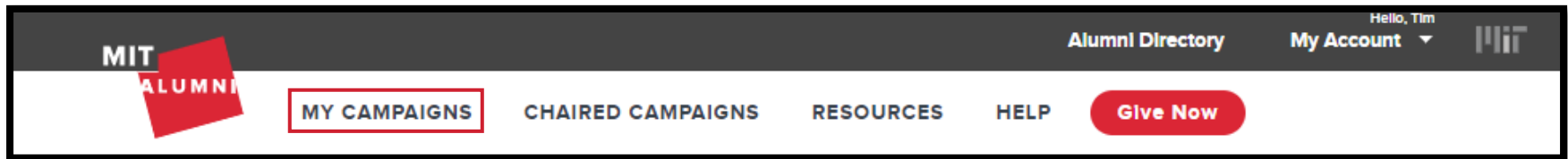
A list of campaigns that you have been assigned to will appear on the "My Campaigns" page. Click on "My Dashboard" to go to your dashboard page for this campaign.

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My Campaigns

Group Name	Campaign Name		Active
MIT Class of 1996	Demo Campaign	My Dashboard	✓

Prospect Selection

Prospect Selection is used to find and select prospects you want to contact.
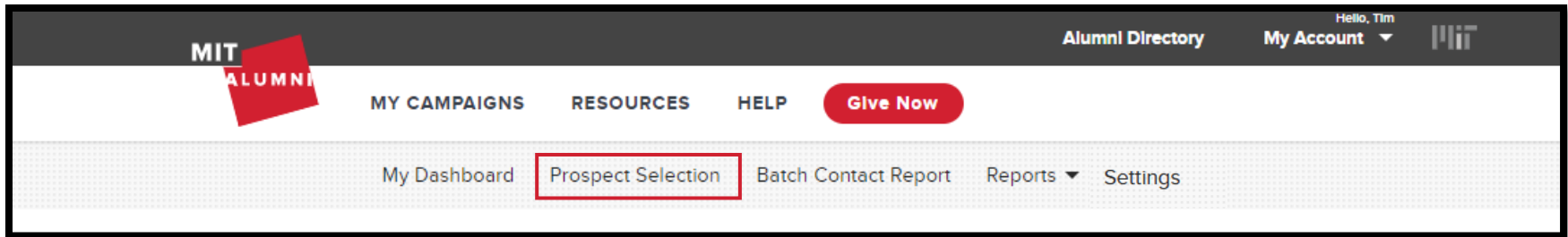
For those serving in both fundraising and outreach roles, you will have the flexibility to choose a prospect for fundraising, outreach, or both.

Filters can be used to help you narrow down your search to select prospects to add to your list.

For more filter options, click on the "More Filters" button.

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Example: Fundraising Volunteer

Fundraising Filters
- ☐ Not Assigned
- ☐ Non-Donor
- ☐ Open Pledge
- ☐ LYBUNTS
- ☐ Priority

More filters

Clear All Filters

See "More filters" for [Fundraising](#).

Example: Outreach Volunteer

Outreach Filters
- ☐ Not Assigned
- ☐ Not Registered
- ☐ Lives in New England
- ☐ Priority

More filters

Clear All Filters

See "More filters" for [Outreach](#). The "Likely to Register" filter will return the star ["Rating"](#) (5,4, 3, 2, and 1) selected.

Fundraising Filters
- ☐ Not Assigned
- ☐ Non-Donor
- ☐ Open Pledge
- ☐ LYBUNTS
- ☐ Priority

Outreach Filters
- ☐ Not Assigned
- ☐ Not Registered
- ☐ Lives in New England
- ☐ Priority

More filters

Clear All Filters

Fundraising & Outreach Volunteer

See "More filters" for [Fundraising & Outreach](#).

To help in your selection process, click the prospect's name to view preview details. You will be able to see more details, including biographic and contact information and giving or attendance history based on your role, once you have added this prospect to your list.

Once you make a prospect selection, you will need to reach out to your staff liaison if you need to have this person removed from your prospect list.

My Dashboard

➢ Personal Progress

In the navigation, click on "My Dashboard" to track your progress based on your volunteer role of fundraising, outreach, or fundraising & outreach.

Example: Fundraising Volunteer

Personal Progress

Fundraising Selected Prospects	Fundraising Contacted Prospects	Donors
5	5	0
Dollars Raised	**Dollars Pledged**	**Reunion Dollars Pledged**
$0.00	$0.00	$0

Example: Outreach Volunteer

Personal Progress

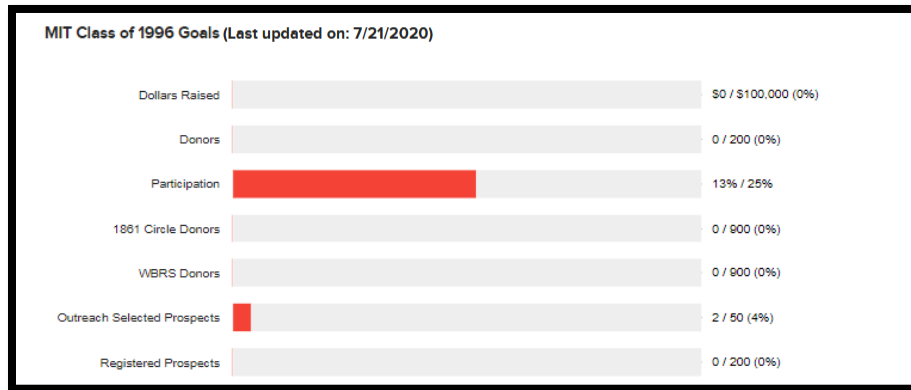| Outreach Selected Prospects	Outreach Contacted Prospects	Registered Prospects
6	3	0

Example: Fundraising & Outreach Volunteer

Fundraising & Outreach Volunteers will see all information within "Personal Progress." If a prospect is an outreach and fundraising prospect, they will be counted in each fundraising and outreach section.

Personal Progress

Outreach Selected Prospects	Outreach Contacted Prospects	Registered Prospects
2	0	0
Fundraising Selected Prospects	**Fundraising Contacted Prospects**	**Donors**
1	1	1
Dollars Raised	**Dollars Pledged**	**Reunion Dollars Pledged**
$100.00	$0.00	$0

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➢ Campaign Goals

Monitor the progress of your class/group towards the overall campaign goals. The date of when these goals were last updated will be shown.

MIT Class of 1996 Goals (Last updated on: 7/21/2020)

Dollars Raised	$0 / $100,000 (0%)
Donors	0 / 200 (0%)
Participation	13% / 25%
1861 Circle Donors	0 / 900 (0%)
WBRS Donors	0 / 900 (0%)
Outreach Selected Prospects	2 / 50 (4%)
Registered Prospects	0 / 200 (0%)

➢ My Prospects

The prospects you've selected will appear at the bottom of the "My Dashboard" page. You have filters above your prospect list to help you manage your list of prospects. Fundraising volunteers will see the Fundraising Filters, outreach volunteers will see the Outreach Filters, and Fundraising & Outreach will see both filters.

Example: Fundraising Volunteer

Follow Up Filters
- ☐ Follow up in next 7 days
- ☐ Follow up past due

Fundraising Filters
- ☐ LYBUNTS
- ☐ Open Pledge
- ☐ Non-Donor
- ☐ Gift at last reunion
- ☐ Considering Gift
- ☐ To Thank
- ☐ Priority
- ☐ Registered
- ☐ Current Donor
- ☐ Annual Giving Leadership Circle Prospect
- ☐ Annual Giving Loyalty Circle Prospect

Clear All Filters

Prospects

[Select or search for prospect(s)   ▾]   **View Prospects**

Example: Outreach Volunteer

Follow Up Filters
- ☐ Follow up in next 7 days
- ☐ Follow up past due

Outreach Filters
- ☐ Not Registered
- ☐ Intends to Register
- ☐ Registered
- ☐ Lives in New England
- ☐ Priority

Clear All Filters

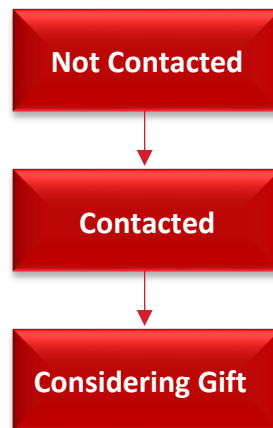**Prospects**

Select or search for prospect(s) ▼   **View Prospects**

Example: Fundraising & Outreach Volunteer

Follow Up Filters
- ☐ Follow up in next 7 days
- ☐ Follow up past due

Fundraising Filters
- ☐ LYBUNTS
- ☐ Open Pledge
- ☐ Non-Donor
- ☐ Gift at last reunion
- ☐ Considering Gift
- ☐ To Thank
- ☐ Priority
- ☐ Registered
- ☐ Current Donor
- ☐ Annual Giving Leadership Circle Prospect
- ☐ Annual Giving Loyalty Circle Prospect

Outreach Filters
- ☐ Not Registered
- ☐ Intends to Register
- ☐ Registered
- ☐ Lives in New England
- ☐ Priority

Clear All Filters

Prospects

Select or search for prospect(s) ▼   **View Prospects**

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You can view key pieces of information in the prospects table to help you prioritize your outreach. You can sort the table by clicking on any of the column headers.
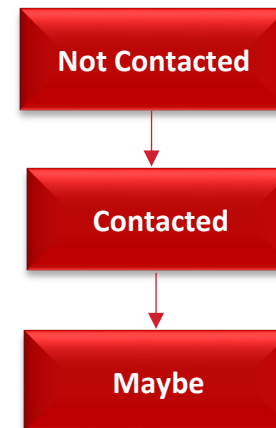

Fundraising and Outreach Stages

Contact Report, Email, or Call/Text buttons

- **Name –** Click on the prospect's name to view more details about this prospect.
- **Stages –** Track your progress towards our fundraising and/or outreach goals. Stages appear under the prospect's name. You will receive an email notification when your prospect reaches the goal stage of Donated or Registered.

FUNDRAISING STAGES

Not Contacted

↓

Contacted

↓

Considering Gift

OUTREACH STAGES

Not Contacted

↓

Contacted

↓

Maybe

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```
        Pledge Secured                              Intends to Register

    Declined        Donated                      Declined        Registered
```

- **My Last Contact** – the last contact report that you submitted for this prospect.
- **Follow Up Date** – the date you set on the last contact report as a reminder as to when you should reach back out to this prospect.
- **Overall Giving Behavior** – is noted for fundraising volunteers ONLY.
    - This information is based on fiscal year giving.
- **Likely to Register** – available to Alumni Association reunion outreach volunteers ONLY.
    - This will be uploaded at the beginning of the fiscal year and will remain static throughout the campaign.
    - Likely to Register: As an example, alumni with a five-star rating are predicted to have the highest likelihood of attending their reunion while alumni with a one-star rating are predicted to have the lowest likelihood of attending their reunion.
    - Engagement Level: Noted for Sloan reunion and non-reunion outreach campaigns. For example, a five-star rating would indicate a highly engaged alum.
- **Engagement Level**
    - A five-star rating to indicate the overall engagement for this alum.
    - As an example, alumni with a five-star rating are highly engaged alumni and alumni with a one-star rating have low engagement.
- **Action buttons** – use these buttons to add a contact report, send an email or call/text the prospect.
    - The "Send Email" button will be grayed out if there is no available email address on the record.
    - The "Call/Text" button will be grayed out if there is no phone number available on the record.

Prospect View Details

From your dashboard, when you click on a prospect's name, you will have access to additional information including biographic and contact information and giving or attendance history based on your role. You will also be able to track your outreach.

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➤ **Personal** – this will include home information, business information, and MIT information.

➤ **Events** – this will include the past 5 events the prospect has attended and their past reunion attendance, if a reunion campaign.

➤ **Volunteerism** – all current volunteer activities as well as the last five past volunteer activities.
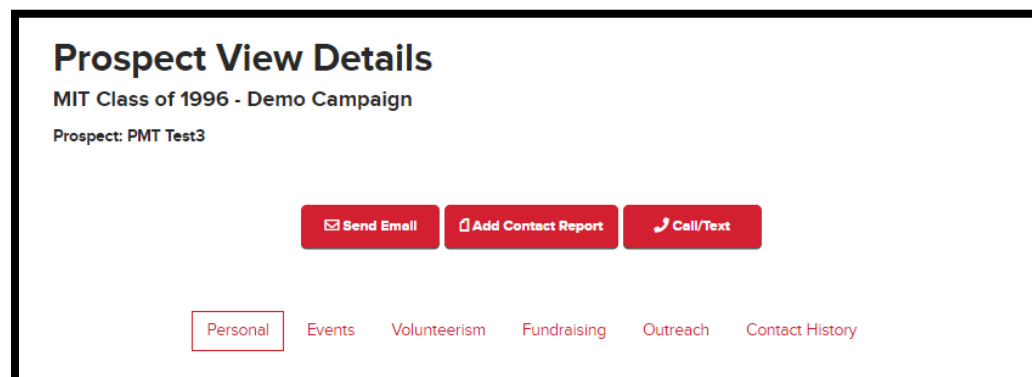
➤ **Fundraising** *(appears ONLY for fundraising volunteers)* – this will show current stage, overall giving behavior, fundraising strategy, reunion gift credit, open pledges, and gift history.
  - Giving details will show the current fiscal year giving and the last five fiscal years of giving.
  - Reunion gift credit information will appear if this is a reunion campaign.
  - The giving history graph will include the current fiscal year and the past five fiscal years.
  - If the prospect has an open pledge, single-year and multi-year pledge details will be shown.
  - The Fundraising Strategy box will include information from your staff liaison to guide you when soliciting your prospect. A "Suggested Ask Amount" that was set by your staff liaison will also be included. For Sloan campaigns, the "Suggested Ask Amount" may not be included.

➤ **Outreach** *(appears ONLY for outreach volunteers)* – It will include the "Likely to register" score as well as an outreach strategy created by your staff liaison on how best to encourage this prospect to register for the event.

➤ **Contact History** – this will track the history of your contact with a prospect.
  - The contact reports that you've filed for a prospect will appear by default.
  - You and your staff liaison will be able to view emails sent through the Outreach Management Tool, notes, and secured pledges (fundraising only) in this area.
  - It will show the total times you've contacted this prospect as well as the days since you last contacted this prospect.
  - When you click on the "View All" option, this will show all contact reports filed by all volunteers for this prospect within this campaign.

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Personal   Events   Volunteerism   Fundraising   Outreach   Contact History

View All

Contact History

| | **1** | **0** |
| | Times Contacted | Days Since Last Contact |

	Date	Purpose	Outcome	Author	
✉	9/24/2019	$ Solicitation	$ Left / Sent Message	Tim Beaver	

View Contact Report Notes

View Email

- An alert message will appear at the top of this page when a prospect has last been contacted by another volunteer in any campaign. Click the "View Details" link to see the last contact report entered for this prospect.

Prospect View Details

Class of 1997 - 1997 Test Campaign

Prospect: PMT Test3

⚠ Contacted by another volunteer. View Details

✉ Send Email   📱 Add Contact Report   📞 Call/Text

Personal   Events   Volunteerism   Outreach   Contact History

- 📣 **Registered** will appear if a prospect registered for the campaign-related event.
- **$ Donated** will appear if a prospect gave a campaign-related gift during the current fiscal year.

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Donated/Registered Icons
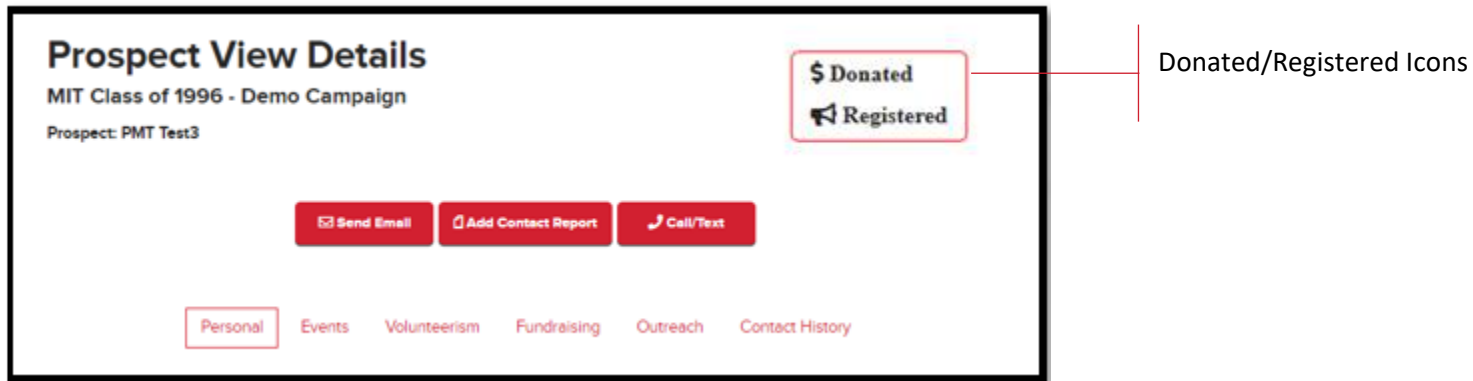
Contact Report

➢ **Filing a Contact Report**

On "My Dashboard" you will see the option to file a contact report in the action buttons. Please file a contact report after every contact attempt with your prospects. This will help you effectively manage your prospect list, set follow-up dates, and help inform your staff liaison. If you are a Fundraising & Outreach Volunteer, you'll have the option to select the "Type" of contact report that is being filled out.

- The "Contact Report Notes" field is used to add additional information about your contact with this prospect. These notes will only be viewable by you and your staff liaison through the Outreach Management Tool under "Contact History". This is an optional field.
- The "Follow Up On" field is where you can set a reminder for yourself to follow up with this prospect. On the follow up date, you will receive a notification email reminding you to come back to the OMT to follow up with this person. This is an optional field.
- The "Type" will only be shown to those who are both Fundraising & Outreach Volunteers. You will have the option to select the contact that's needed for fundraising and/or outreach.

- Selecting the outcome 'Bad Contact Information', will add the following icon next to your prospect's name. ⚠️
- Use the 'Additional Notes' Outcome to add additional information about a prospect without changing the prospect's current stage.

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➢ Securing a Pledge (Fundraising ONLY)

"Pledge Details" will only appear when the "Pledge Secured" option is selected for the "Fundraising Outcome" field.

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You will have the option to select a Single-Year or Multi-Year pledge. Single-Year pledges will be paid before June of this fiscal year. Multi-Year pledges can be paid over 2-5 years. In order for the full pledge to count towards the Reunion Gift, a payment must be made before June of this fiscal year.

In the "Designation" field, start typing into the box to find a "Designation." The "Suggestions" button will have specific funds that have been provided by your staff liaison.

Please select when the pledge will be due. For a Multi-Year pledge, prospects will receive a pledge payment reminder annually reflecting this date.

If you need to delete a pledge, use the "x" on the top right to remove the pledge details.

Pledge due date (month/year)

If a prospect would like to make pledges to multiple designations, you can add another pledge.

After submitting the contact report with the pledge details, your staff liaison will be notified and the information will take 2-3 business days to have the pledge added to the prospect's record.

The "Pledge Details" you've submitted will appear in the "Contact History" tab. Click on the icon to view more details.

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Click to view "Pledge Details" information.

Send Email

On "My Dashboard," you will see the option to send an email in the action buttons.

- You will have the option to choose a template that you have created or your staff liaison has created or you can write your own email.
- Email templates include tokens which will populate data for an email recipient. For example: prospect name, volunteer name, etc. You can preview the email to see how these tokens will be used. Please refer to the Appendix for a full list of tokens.
- To paste text into the email editor, use **Ctrl+Shift+V** or **Cmd+Shift+V** on Mac.
- If you would like to save this email as a template, check the box and name your email template.

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- Send your email to multiple recipients by selecting up to 9 of your prospects from the 'Add more recipients' option.
- A contact report will automatically be filed when you send an email. The contact report purpose will populate based on the template selected or choose the purpose if creating your own email. Additional notes and a follow-up reminder date can be added.
- Check the box to either save an email template to use later or update an existing email template.
- On the "Contact History" tab, you'll be able to access a copy of the email that you sent to your prospect.

"Send Email" button

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Call/Text

On "My Dashboard," you will see the option to call/text in the action buttons. When you click on the call/text button, a pop-up window will appear with all of the phone numbers on file for this prospect. You can then choose which number you'd like to use to call/text. Don't forget to file a contact report after you contact this prospect!
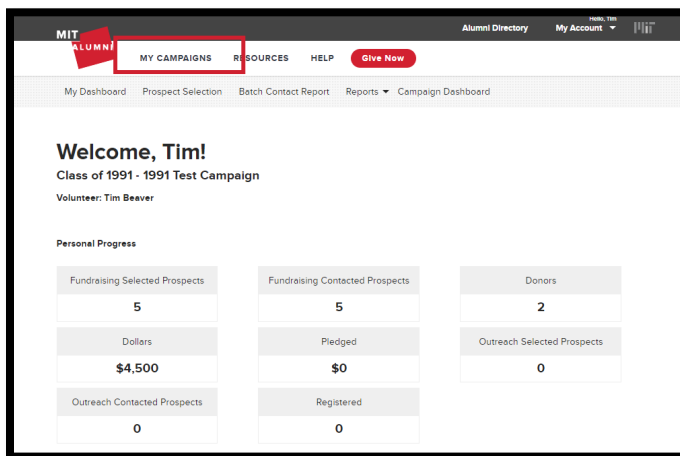
"Call/Text" button

Create Email Template

In the navigation, click on "My Campaigns" to access Email Templates. Templates are available for all of your campaigns. For example, if you are in two campaigns, you can create one template to use in both campaigns.

Click on "Create Email Template" to create a new email template.

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Create Email Template

Please use this form to create a new email template. Fields marked with * are required.

Email Template Name *

(1) Solicitation Email

Subject *

(2) Our MIT Reunion!

Fundraising

(3) ☑ Fundraising Email Template

Fundraising Purpose

(4) Solicitation ▾

Outreach

(5) ☐ Outreach Email Template

Outreach Purpose

(6) ▾

(7) Email Tokens ▾ | ⟨⟩ ↩ ↪ 1. B I S A A ∂ ⊡ ≡ ≡ ≡ ≡ ∥ ∥ — Iₓ ⤢

Dear $PROSPECT_FIRST_NAME,

Our $REUNION_ORDINAL reunion is right around the corner, and I hope to see you back on campus $REUNION_START_DATE - $REUNION_END_DATE!

As a member of the Reunion Gift Committee, I am reaching out to help build support for our Reunion Gift Campaign and to help our class reach our participation goal. A gift of any size to any fund at MIT counts towards our campaign, and I hope I can count on you to join me!

Cancel | **Save** **(8)**

---

(1) **Email Template Name** - Enter the name of the template to easily find to use when needed.

(2) **Subject** - Enter the email subject line.

(3) **Fundraising Email Template** – If an email is for fundraising, select this box to choose from the "Fundraising Purpose" options.

(4) **Fundraising Purpose** - Choose fundraising purpose.

(5) **Outreach Email Template** – If an email is for event outreach, select this box to choose from the "Outreach Purpose" options.

(6) **Outreach Purpose** – Choose outreach purpose.

(7) **Email Tokens** – Use the drop-down menu to insert email tokens.

(8) **Save** – Click on the "Save" button when email text is complete.

*We recommend email content is created within the email editor or copy and paste text from a plain text editor, like Notepad. Copying and pasting text from Word will cause issues when sending the email.

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View Email Template

The email template has been created.

NAME	Solicitation Email	FUNDRAISING PURPOSE	Solicitation

SUBJECT   Our MIT Reunion!

Dear $PROSPECT_FIRST_NAME,

Our $REUNION_ORDINAL reunion is right around the corner, and I hope to see you back on campus $REUNION_START_DATE - $REUNION_END_DATE!

As a member of the Reunion Gift Committee, I am reaching out to help build support for our Reunion Gift Campaign and to help our class reach our participation goal. A gift of any size to any fund at MIT counts towards our campaign, and I hope I can count on you to join me!

I support MIT for a number of reasons, and a big part of my decision to give back to the Institute is because of the amazing students that are there right now. They are smart, curious, energetic, and they are going to tackle some of the world's biggest problems. I believe my support will enhance their time at MIT, and I know yours will too.

Can I put you down for a gift of $FUNDRAISING_AMOUNT to the $CAMPAIGN_FUND_NAME? If that isn't quite right, please let me know how much you intend to give, and to what fund you want your gift directed. I can have your pledge recorded right away.

Thank you for your support of MIT and our class!

I hope to hear from you soon,

$VOLUNTEER_FIRST_NAME

[All Email Templates] [Update Email Template]

When the template has been saved, a green confirmation message will appear.

Click on "All Email Templates" button to view all your email templates.

Click on the "Update Email Template" button to update template.

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Delete Email Template

In the navigation, click on "My Campaigns" to access your Email Templates.

Click "Delete Email Template" button

Click "Delete" button.

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My Email Templates

The email template has been deleted.

When the template has been deleted, a green confirmation message will appear.

3 email template(s) found.

	ID	Name	Subject	
$	104	Reunion ask	Reunion weekend is almost here	🗑 📋 ✏
$	6165	Reunion ask	Reunion weekend is almost here	🗑 📋 ✏
$	6315	Solicitation Email	Our MIT Reunion!	🗑 📋 ✏

Clone Email Template

In the navigation, click on "My Campaigns" to access your Email Templates.

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My Email Templates

3 email template(s) found.

	ID	Name	Subject	
$	104	Reunion ask	Reunion weekend is almost here	🗑 📋 ✏
$	6165	Reunion ask	Reunion weekend is almost here	🗑 📋 ✏
$	6315	Solicitation Email	Our MIT Reunion!	🗑 📋 ✏

Click "Clone Email Template" button

Update Email Template

The email template has been cloned.

Please use this form to update the Reunion ask email template. Fields marked with * are required.

Email Template Name *

Reunion ask

Subject *

Reunion weekend is almost here

Fundraising

☑ Fundraising Email Template

Fundraising Purpose

Solicitation ▾

Outreach

☐ Outreach Email Template

Outreach Purpose

▾

When the template has been cloned, a green confirmation message will appear.

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Update Email Template

In the navigation, click on "My Campaigns" to access your Email Templates.

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My Email Templates

3 email template(s) found.

	ID	Name	Subject			
$	104	Reunion ask	Reunion weekend is almost here	🗑	▢	✎
$	6165	Reunion ask	Reunion weekend is almost here	🗑	▢	✎
$	6315	Solicitation Email	Our MIT Reunion!	🗑	▢	✎

Click "Update Email Template" button

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Click "Save" button.

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When the template has been saved, a green confirmation message will appear.

Batch Contact Reports

To file the same contact report for multiple prospects at once, use the "Batch Contact Reports" feature found in the top navigation. For instance, if you send a group message using social media you can file a contact report for all of those individuals at once. For fundraisers only, you will not be able to file a secured pledge outcome using this feature. Please go to the individual prospect's record to do this.

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Batch Email

To send the same email to multiple prospects at once, use the 'Batch Email' button found at the bottom of the Volunteer Dashboard page. Select up to 11 recipients by checking the box next to the prospect's name.

You will be sending up to 11 individual emails. We recommend previewing the emails prior to sending to ensure the token data is populating as expected. On the email preview page, click the arrows on the right and left side to view each email. If any changes are needed, click the Edit button to return to the previous screen. Click the Send Email button to send the email to your selected prospects.

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Subject: Thank you for participating in the MIT 24-Hour Challenge!

Message:

Hi PMT ,

Thank you so much for supporting the sixth MIT 24-Hour Challenge on March 10.

It was the participation of individuals, like you and me—who want to help MIT students, faculty, and staff meet the world's greatest challenges—that made it a big success. 7,927 people made a gift to MIT—thank you for being one of them!

This would not have been possible without your help and the help of thousands of other alumni, students, parents, and friends. Thank you again for showing up for the MIT community!

Cheers,

Tim Beaver

1 of 3

[Cancel]   [Edit]   **[Send Email]**

On the email confirmation page, all the emails sent will be displayed. If any emails did not send, the prospects will be listed at the top of the page with the reason why the email did not send to the prospect.
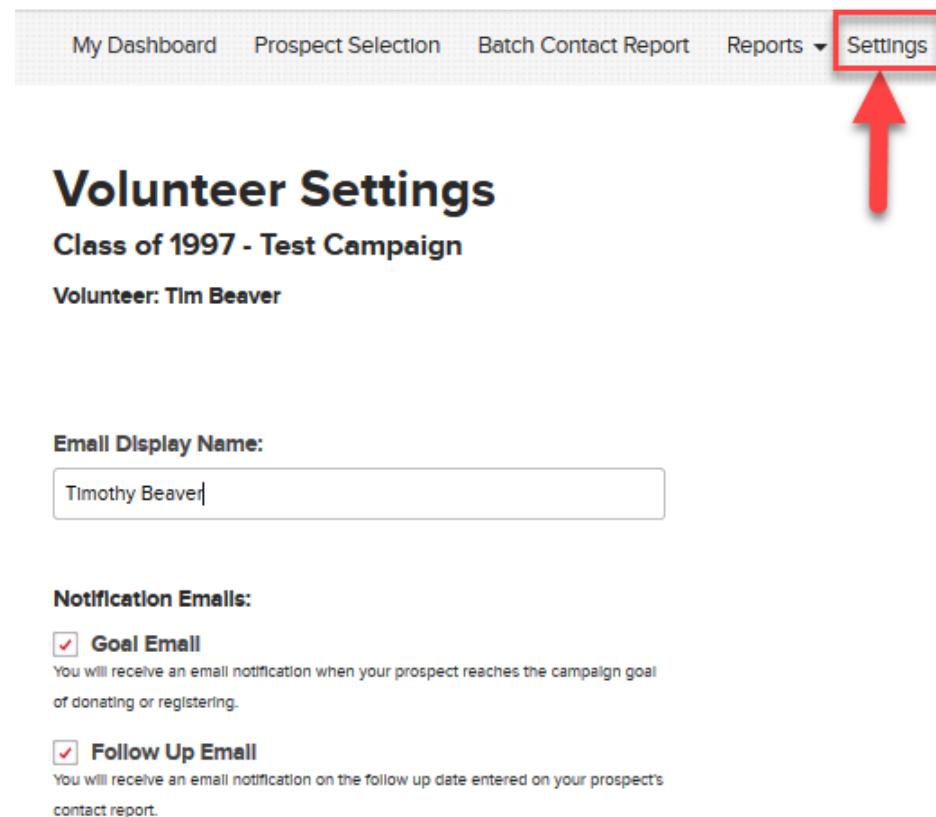
These outreach prosect(s) will not receive fundraising related email:

- PMT Test5

Purpose: $
Thank You

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Settings

On the "Settings" page, volunteers can manage their Email Display Name that appears on emails sent from the OMT. Volunteers can also opt-in/out of the email notifications sent from the OMT. These settings are managed at the campaign level.

Reporting

To view your detailed progress, go to the "Reports" section. You will see a listing of all of your prospects that you have selected, their progress to date, current stage, and your last contact with this individual. You can also download this report. Please refer to the privacy policy for data confidentiality guidelines.

Volunteer Fundraising Report

Class of 1991 - 1991 Test Campaign

Volunteer: Tim Beaver

5 prospect(s) found. Displaying page 1 of 1.

Download Report

First Name	Last Name ↓	Current Stage	Last Gift Date	Donated Amount	Pledged Amount	Reunion Gift Credit	Giving Behavior	Current WBRS	Current 1861	Last Report Date
		Declined								
		Donated								
		Donated								
		Pledge Secured								
		Contacted								

Volunteer Outreach Report

Class of 1991 - 1991 Test Campaign

Volunteer: Tim Beaver

0 prospect(s) found.

First Name	Last Name ↓	Current Stage	Last Report Date	Last Contact Method	Last Outreach Purpose	Last Outreach Outcome	Last Contact Notes	Total Contact Reports

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Resources

On the "Resources" page, you will find links to training materials relevant to your volunteer role. This includes volunteer guides, training videos, and information about giving to MIT.
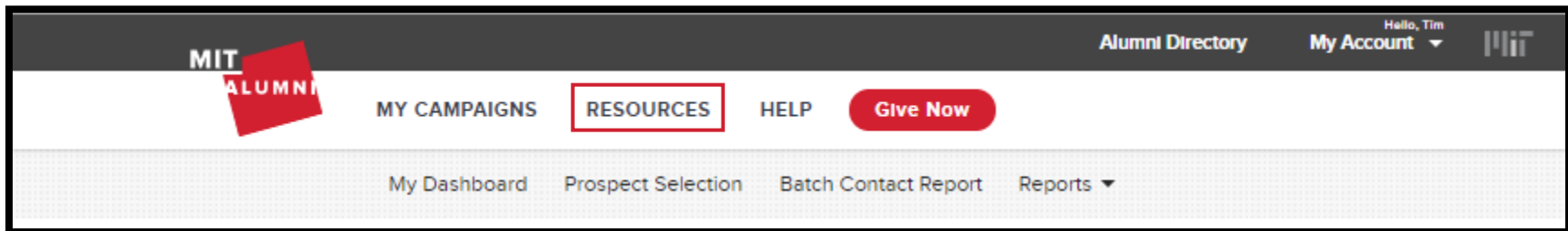
Help

On the "Help" page, you will find contact information for your staff liaison. Please reach out to your staff liaison with any questions.

Appendix

Email templates include tokens which will populate data for an email recipient. For example: prospect name, volunteer name, etc. Below is a list of email tokens, token description and example of the formatted data.

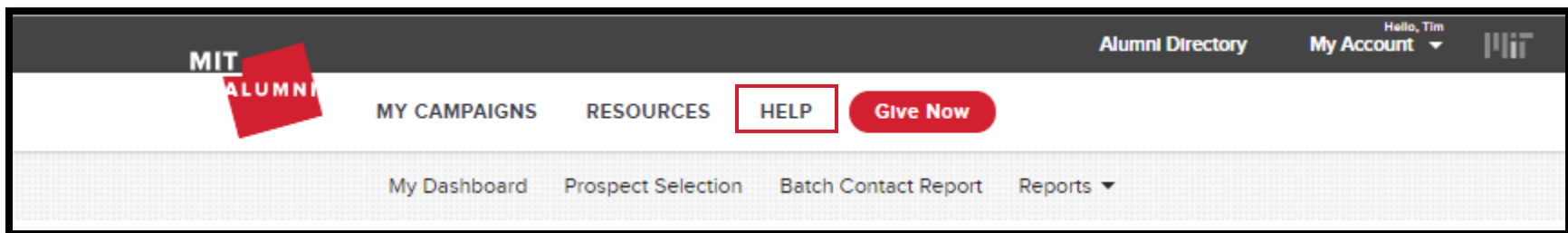| Email Token Description	Email Token	Example of Data
Annual Giving Leadership Circle Goal	$LEADERSHIP_GOAL	900
Annual Giving Loyalty Circle Goal	$LOYALTY_GOAL	900
Ask Amount	$FUNDRAISING_AMOUNT	$100
Campaign Fund Name	$CAMPAIGN_FUND_NAME	Unrestricted Funds of the Institute
Dean's Circle Goal	$DEANS_CIRCLE_GOAL	950
Dollars Raised Goal	$AMOUNT_RAISED_GOAL	$100,000
Donors Goal	$DONORS_GOAL	200
Fund Name of the Last Gift	$LAST_GIFT_FUND_NAME	Unrestricted Funds of the Institute
Fundraising Contacted Prospects Goal	$FUNDRAISING_CONTACTED_GOAL	400
Fundraising Selected Prospects Goal	$FUNDRAISING_ASSIGNED_GOAL	500
Outreach Contacted Prospects Goal	$OUTREACH_CONTACTED_GOAL	400
Outreach Selected Prospects Goal	$OUTREACH_ASSIGNED_GOAL	500
Participation Goal	$FUNDRAISING_PARTICIPATION_GOAL	25%
Prospect's Class Year	$PROSPECT_CLASS_YEAR	1997
Prospect's First Name	$PROSPECT_FIRST_NAME	Bob
Prospect's Full Name	$PROSPECT_NAME	Bob Test
Prospect's Preferred Name	$PROSPECTS_PREFERRED_NAME	Mr. Bob E Test
Registered Prospects Goal	$REGISTERED_GOAL	100
Reunion End Date	$REUNION_END_DATE	May 31
Reunion Ordinal	$REUNION_ORDINAL	25th
Reunion Start Date	$REUNION_START_DATE	May 28
Reunion Start Month	$REUNION_START_MONTH	May
Volunteer's First Name	$VOLUNTEER_FIRST_NAME	Tim
Volunteer's Full Name	$VOLUNTEER_NAME	Tim Beaver

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