

DONOR CONTACT SUMMARY

September 14-20, 2015

AUTHOR	CONTACT TYPE	CONTACTS		SCHEDULED VISITS		PROF. ADVISOR	
		GOAL	+/-	GOAL	+/-	GOAL	#
	Total						
	Email	1					
	Phone Conversation	1					
	Scheduled Visit	3					
	Public Relations	2					
	Cold Call	3					
	Rawhide Visit	8					
	Total	18	25	-7	7	4	2/Month
	Left Message	4					
	Phone Conversation	6					
	Scheduled Visit (blank)	2					
	Rawhide Visit	10					
	Total	22	15	7	5	7	2/Month
	Email	4					
	Scheduled Visit	1					
	Public Relations	4					
	Cold Call	3					
	Rawhide Visit	4					
	Total	16	25	-9	7	2	2/Month
Grand Total		56	65	-9	19	9	6

Donor Contact Summary
January 1-March 31, 2015

AUTHOR	CONTACT TYPE		CONTACTS		SCHEDULED VISITS		WEALTH SCREENING		PLANNED GIVING		PROF. ADVISOR	
	CONTACT TYPE	Total	GOAL	+/-	GOAL	+/-	GOAL	+/-	GOAL	+/-	GOAL	+/-
1	Left Message	107										
	Email	144										
	Cold Call	75										
	Phone Conversation	84										
	Scheduled Visit	90										
	Public Relations	33										
	Professional Advisor	11										
	(blank)											
	Correspondence	7										
	Planned Giving Discussion	4										
Total		555	325	230	91	-1	26	-26	6/Quarter	-2	6/Quarter	5
2	Left Message	36										
	Email	33										
	Phone Conversation	45										
	Scheduled Visit	13										
	Public Relations	1										
	Professional Advisor	3										
	Correspondence	31										
	Rawhide Visit	4										
	Planned Giving Discussion	4										
	Wealth Engine Screen	18										
Total		188	195	-7	65	-48	26	-8	6/Quarter	-2	6/Quarter	-3
3	Left Message	39										
	Email	131										
	Cold Call	14										
	Phone Conversation	52										
	Scheduled Visit	37										
	Public Relations	1										
	Professional Advisor	1										
	(blank)											
	Correspondence	3										
Total		278	325	-47	91	-54	26	-26	6/Quarter	-6	6/Quarter	-5
Grand Total		1021	845	176	247	-103	6	-60	6	-10	6	-3