



# How to Plan an Efficient and Effective Campaign Using New Tools and Tech


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## Agenda

- New Tools and Tech – section 1
- How to Prepare for a Capital Campaign
- New Tools and Tech – section 2

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## Why Technology?

- Save Time
- Save Money
- More Effective, More Efficient

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## The Obvious...

# *Zoom*

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## Our Favorites...

- Trello
- Slack
- Dropbox
- Doodle Poll
- Calendly
- Chat GPT



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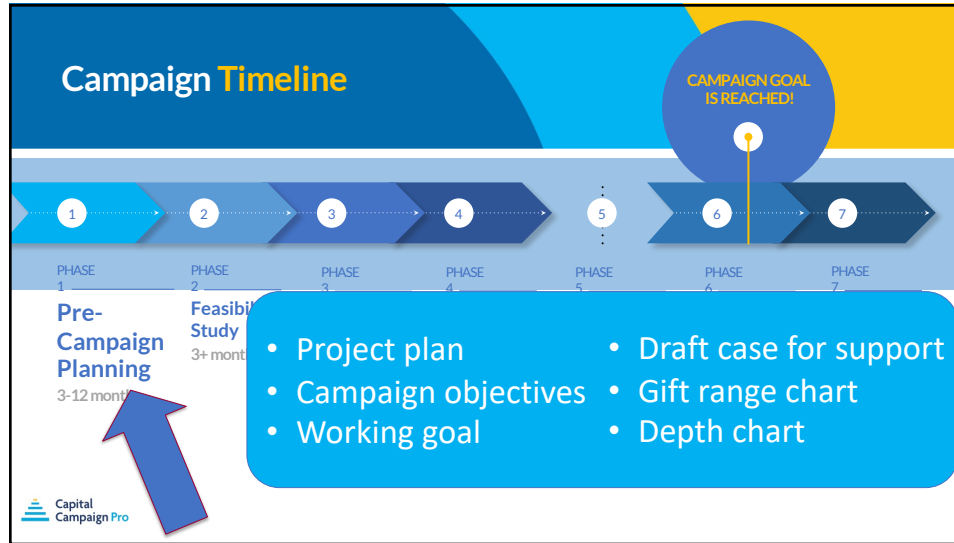
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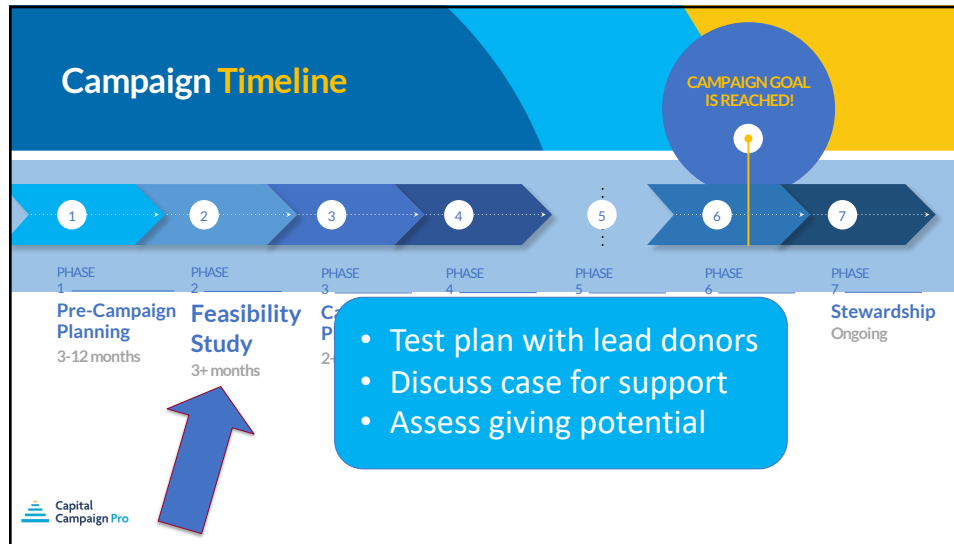
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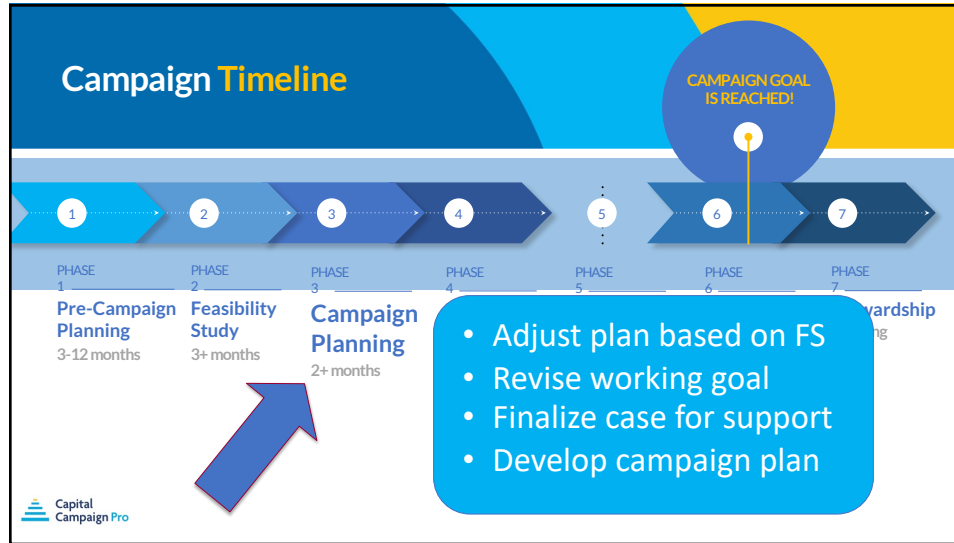
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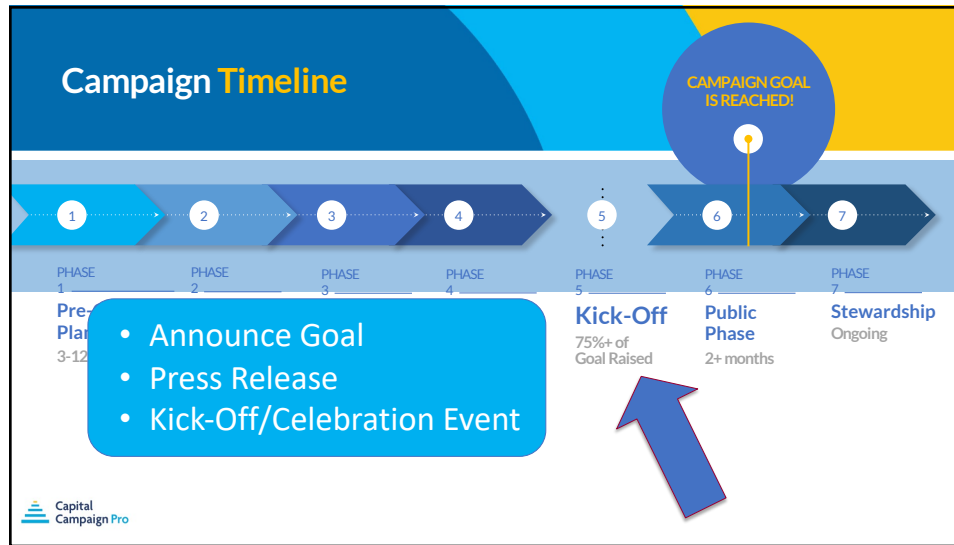
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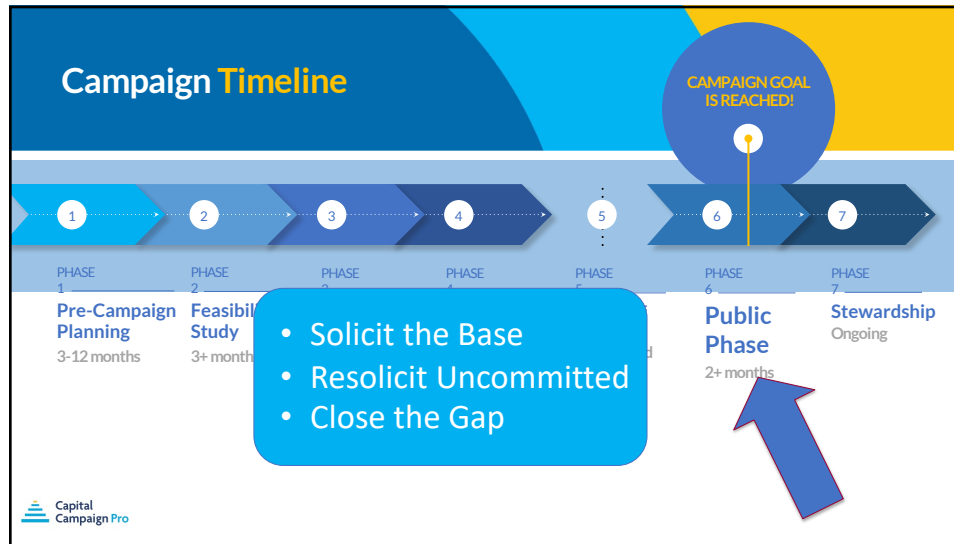
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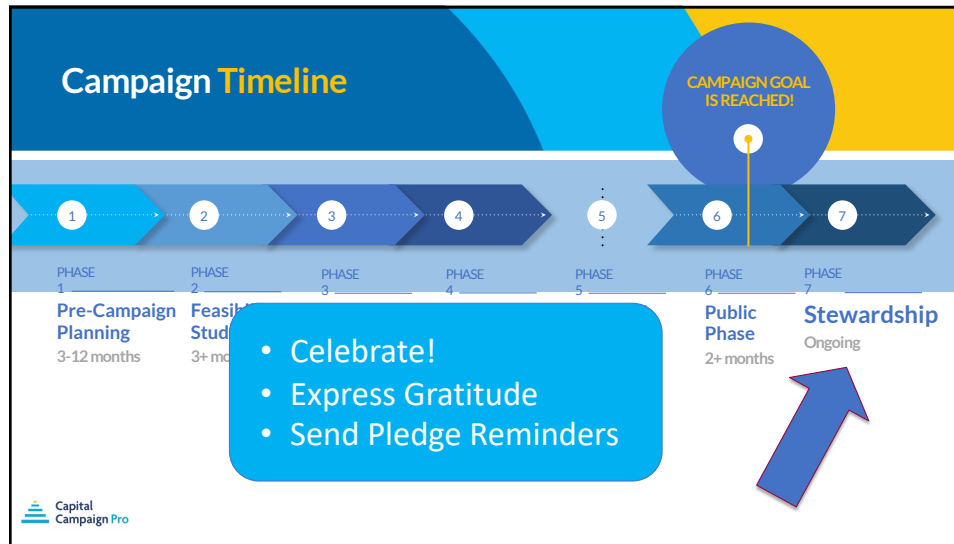
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## Donor Identification: High Tech and Low Tech

- Interviews/Conversations
- History of Giving
- Donor Research
- Wealth Screening

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## New Tools and Tech for Fundraising


- Donor CRM
- Wealth Screening
- iPad (sharing case/plans)
- Stewardship Videos
- Tours – Virtual – Live/Pre-Recorded

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## Status Quo or No?

- Does your consultant need to be in the room?
- Do committee members need to be in the room?
- Do donors need to be in the room?

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Free Tech Assessment  
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Are Your Development Systems Campaign-Ready?  
Strong Systems and Technology Save You Time and Money

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