



Cause and Solution, Inc.[™]
Your Cause ▶ Our Solution

ROUNDTABLE: Using RENXT for Moves Management
Tammy L. Batchelor, CFRE, bCRE

bbcon

The Tech Conference for a Better World

OCTOBER 13-15, 2021



Tammy L. Batchelor, CFRE, bCRE
Chief Operating Officer | Partner
Cause and Solution, Inc.

Tammy has more than 20 years of fundraising and managed services experience working with community, research and healthcare system foundations across the country. In her previous role as the System Director of Operations for the Catholic Health Initiatives National Foundation, Tammy had responsibility and oversight for 40+ Raiser's Edge / NXT databases representing 2M+ active and prospect donor records. Tammy also led the system-wide conversion initiative to Blackbaud CRM to help create a more effective and efficient platform for fundraising development locally, regionally and nationally.

In her current role as Chief Operating Officer and Partner for Cause and Solution, Tammy continues to enjoy working with non-profits of all sizes to find solutions to help improve fundraising.



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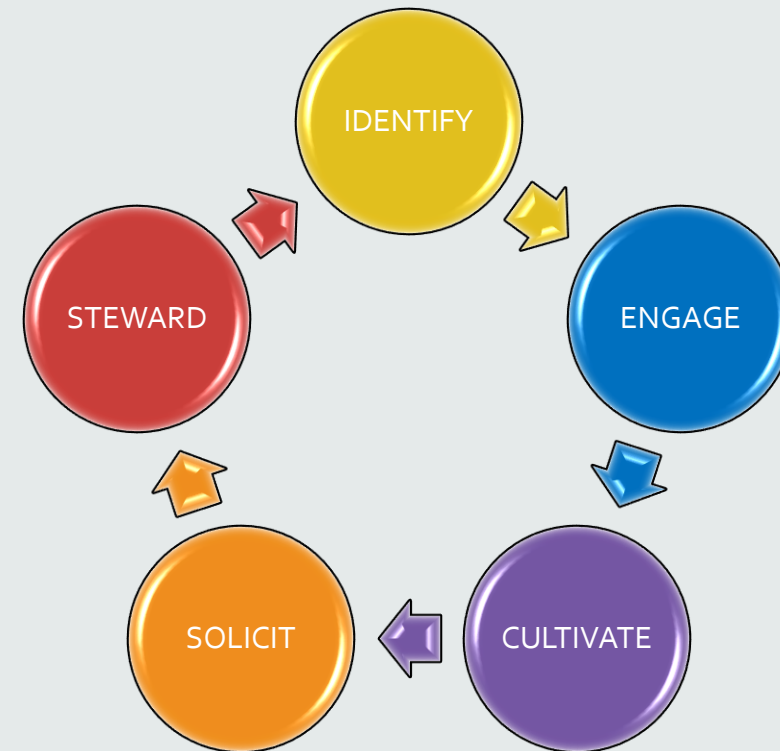
About Cause and Solution, Inc.[™]

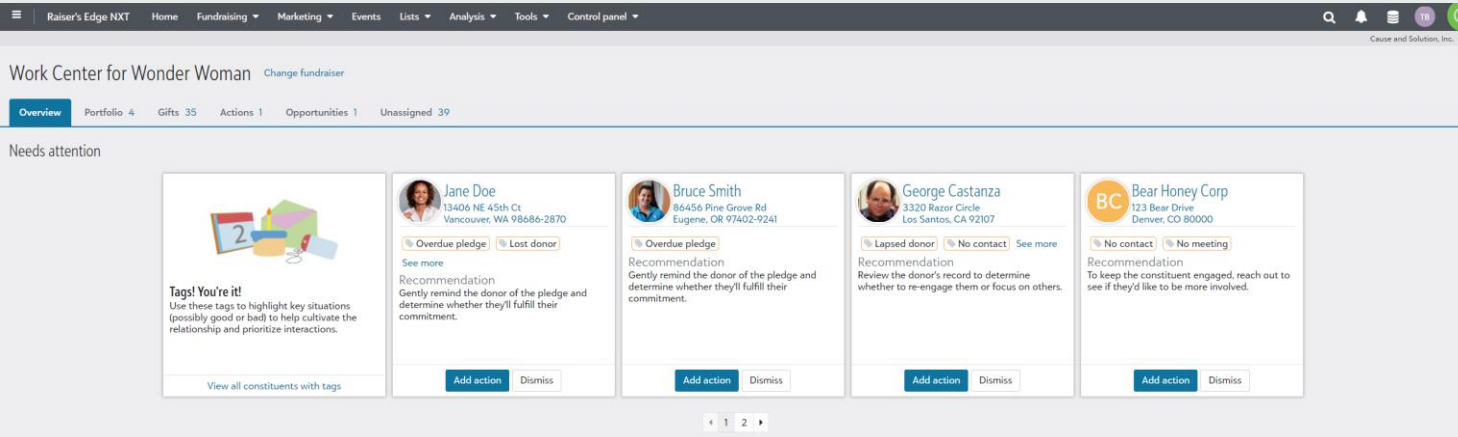
Cause and Solution's professional staff includes MBAs, CFREs, CPAs and bCRE-PRO's. We are highly skilled and experienced in fundraising development; project management; system integration; and operational and financial management for non-profits.



Many organizations utilize a Moves Management process to track Development team KPI's and for donor relationship history

Sample Moves Management Steps





Work Center for Wonder Woman [Change fundraiser](#)

Overview Portfolio 4 Gifts 35 Actions 1 Opportunities 1 Unassigned 39

Needs attention

Tags! You're it!
Use these tags to highlight key situations (possibly good or bad) to help cultivate the relationship and prioritize interactions.

[View all constituents with tags](#)

Constituent	Status	Recommendation
Jane Doe 13406 NE 45th Ct Vancouver, WA 98686-2870	Overdue pledge, Lost donor	Gently remind the donor of the pledge and determine whether they'll fulfill their commitment.
Bruce Smith 86456 Pine Grove Rd Eugene, OR 97402-9241	Overdue pledge	Gently remind the donor of the pledge and determine whether they'll fulfill their commitment.
George Castanza 3320 Razor Circle Los Santos, CA 92107	Lapsed donor, No contact	Review the donor's record to determine whether to re-engage them or focus on others.
Bear Honey Corp 123 Bear Drive Denver, CO 80000	No contact, No meeting	To keep the constituent engaged, reach out to see if they'd like to be more involved.

Steps to Get Started!

Review and update current Solicitor Pipeline/Portfolio in RENXT Work Center

Review Unassigned Top Prospects in RE NXT Work Center Unassigned Tab and assign if qualified prospect

Code all identified prospects with Prospect Status Code with corresponding Moves Management step: Identify, Engage, Cultivate, Solicit, Steward

Begin entering Moves/Activity into Actions and Solicitations into Opportunities for Assigned Prospects

Build Moves/Activity and Opportunities Dashboards in RENXT Reporting

Questions? Contact Me!

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LETS STAY CONNECTED

