

WINDSHIELD 2020

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Windshield 2020 Next Steps User Guide

The *Windshield next steps module* is a tool that helps you plan, document, and track the next steps of engagement with each prospect. It also provides reporting features to assist in campaign management and analysis.

Managing Next Steps

1. **Select a Prospect:** In a campaign, choose the prospect and click the pencil icon to edit.
2. **View or Add Next Steps:** A dialog box will appear. Select "Next Steps" to view existing entries or "Add Next Steps" to create a new one.

Next Steps Fields:

- **Caller:** The person responsible for the next step.
- **Date:** The planned date for the next step.
- **Purpose:** A brief description of the step's objective.
- **Notes:** Details of what occurred during the interaction.
- **Stage:** Select the current stage of the asking process (these stages can be customized in the Maintenance section of the software).
- **Completed:** Mark the step as completed once it's done. Ideally, there should only be one uncompleted next step at a time. You should not create all next steps for a prospect at once but rather add the next one after the previous step is completed.

Reporting

Two reports can be generated based on next steps. These reports are exported in Excel format, allowing you to format and analyze the data as needed. To access them, go to the main campaign screen and click the "Download Report" button. The relevant reports for next steps are:

1. **ACS Export** (Annotated Core Strategy): This export contains data for uncompleted next steps. It's designed to help you review and plan upcoming cultivation efforts.
2. **KPI Export** (Key Performance Indicator): This export contains data for completed next steps. It's used to evaluate past cultivation efforts and assist in planning future strategies.

Cultivation Basics: Stage Definitions

The asking process is part of fundraising training provided by *The FOCUS Group*. It typically consists of four stages:

1. **Informal Conversation**
2. **Tour**
3. **Presentation of the Case**
4. **The Ask**

Organizations may use these terms or redefine them as needed. Stages can be customized in the Maintenance section and selected for any Next Step record. Alternatively, users can skip this field if desired.

Importance of Managing Next Steps

Effective management of next steps is crucial for fundraising success. It's easy to lose track of details amidst a busy schedule. By taking the time to plan and document each step, you ensure consistent follow-up and maintain momentum with prospects.