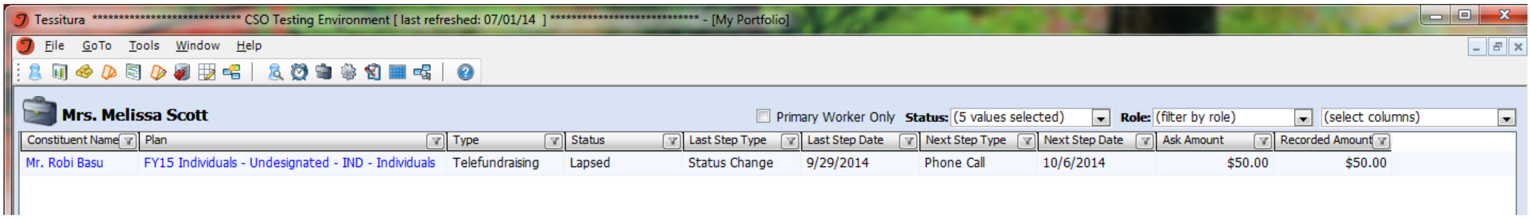
Telefundraising Calls in Tessitura

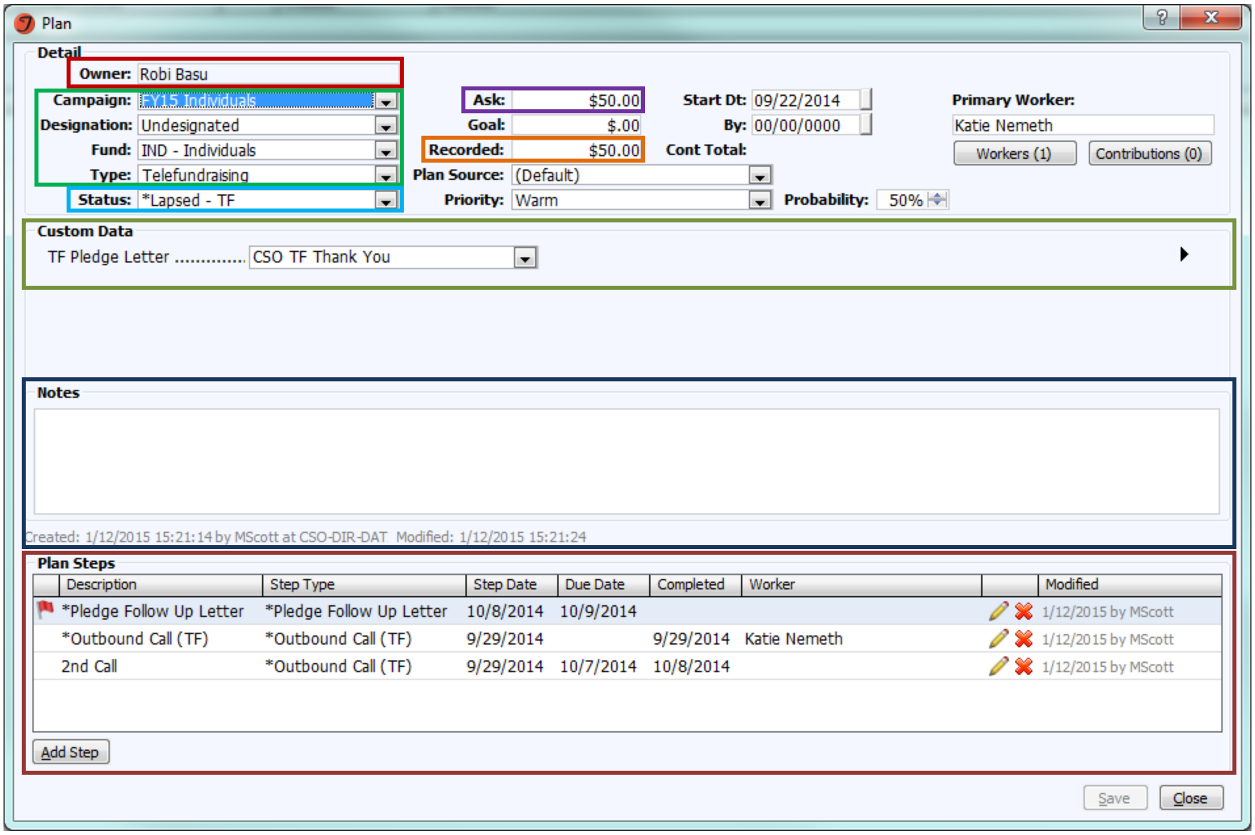
1. Open Tessitura from your desktop and log in
2. Once Tessitura opens, you will automatically be taken to your portfolio of calls.
3. From this screen you can filter, sort and open any call leads.



On your portfolio screen you will see the following columns:

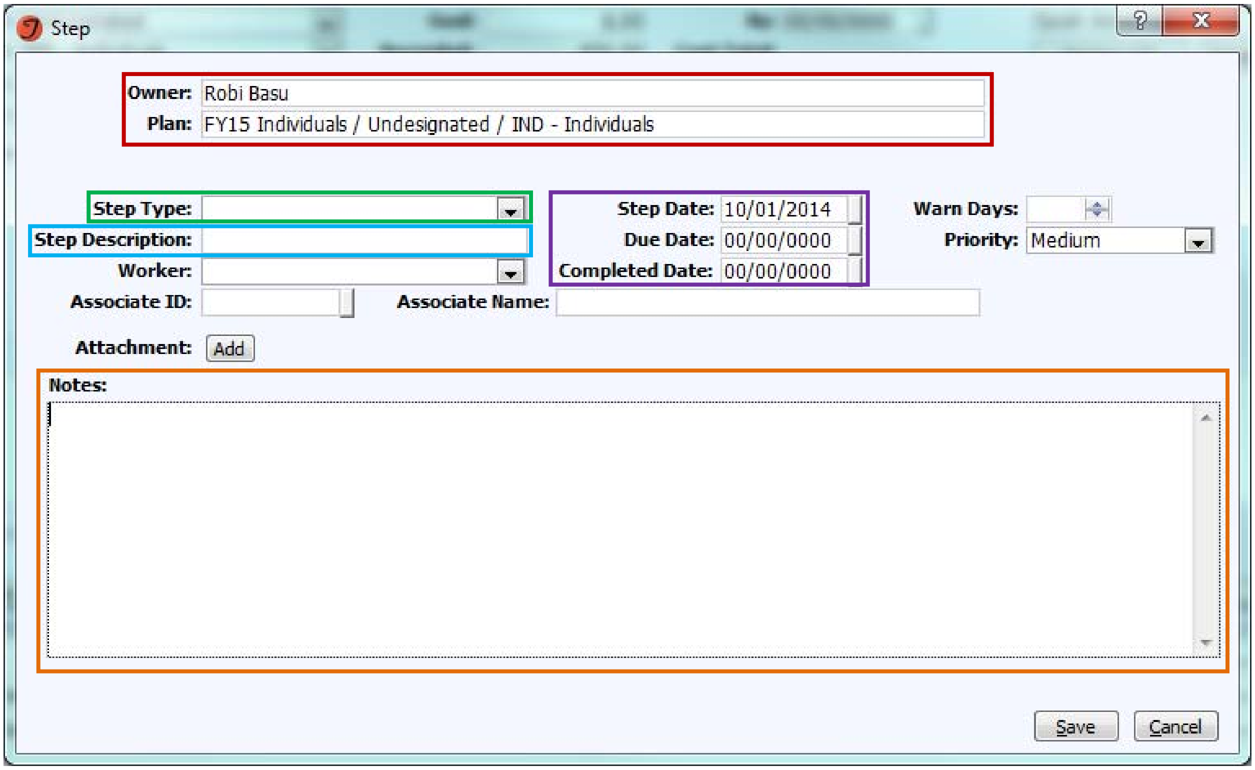
a. Constituent Name
b. Plan – this is all the information about the telefunding call for this patron
c. Type – Should always be set to Telefunding
d. Status – This will start as *Renewal, *Lapsed, or *Acquisition. This field can be filtered.
e. Last Step Type and Date
f. Next Step Type and Date
g. Ask Amount – the amount of the telefunding ask
h. Recorded Amount – the amount the patron agrees to pledge or pay

Patron Plan Window



1. Owner: The patron being called
2. Campaign/Designation/Fund/Type: Pre-determined gift information – this doesn't change
3. Status: Will start as *Renewal, *Lapsed, *Acquisition - Sub or *Acquisition – STB, and will be changed by caller to one of the following upon completion of the gift:
    a. *Ask Completed - TF
    b. *Declined - TF
    c. *No Response - TF
    d. *Will Consider - TF
4. Ask Amount: pre-determined ask amount
5. Recorded Amount: Updated by the caller after the patron agrees to a pledge or gift
6. TF Pledge Letter: Pledge letter type based on code on header
7. Notes: This section of notes should be used for general information about the patron – not gift specific notes.
8. Plan Steps: Steps can be added to a plan to record actions related to the plan, such as mailing a letter or making a phone call.

Adding Steps



When you open the Add Step button from the Plan main screen, you will get the above window.

1. Owner and Plan: Refers to the plan for which you are adding steps.
2. Step Type: Under Step Type you have four options:
    a. *Outbound Call - TF: this type will be added if the patron could not be reached. You will add an additional step for a follow up call
    b. *Pledge Follow Up Letter - TF: if the patron agrees to make a pledge, add this type for further follow up by Development staff
    c. *Credit Card Gift – if the patron agrees to make a gift over the phone with their credit card
    d. *Address Change – if the patron has new contact information
3. Step Description: A short description of the step. The step type name is copied to the description field by default, but can be changed. This can be things like 2^{nd} Call or No Answer.
4. Step Date/ Due Date/ Completed Date:
    a. Step Date: defaults to the current day's date
    b. Due Date: used to set due dates on future steps or actions
    c. Completed Date: used on completed steps
5. Notes: This notes section can be used to add notes about your call.

To Make Calls

1. Open Tessitura, the screen will default to your Portfolio
2. Click on the blue Constituent Name from the left side of the screen. This will display their general tab and phone #.
3. To see Plan information select the Plans tab and then double-click on the active plan that has *FY15 Individu*als in the campaign field.
4. Below are the steps for the resolution of calls.

No Answer:

1. When you get no answer on your first call you will enter a new step.
    a. Step Type: *Outbound Call – TF
    b. Description: No Answer
    c. Add a complete date
    d. Save and Close
2. Before moving on to the next call you will add another step for a second call with a follow date of one week later.
    a. Step Type: *Outbound Call - TF
    b. Step Description:2nd Call
    c. Step Date: One week out
    d. Save and Close
3. If after the 2nd Call you get no answer add a 3rd Call using the same criteria as a 2nd Call.
    a. Step Type: *Outbound Call - TF
    b. Step Description:3rd Call
    c. Step Date: One week out
    d. Save and Close
4. If there is no answer after 3rd try, change the Plan Status to *No Response.

Patron Makes a Pledge

1. Add a new step once a patron has agreed to make a pledge.
    a. Step Type: *Pledge Followup Letter – TF
    b. Step Description: Send pledge letter
    c. Due Date: The day after the pledge was made over the phone
    d. Save and Close
2. Put the pledge amount in the Recorded field
3. Select a letter type from the drop down in TF Pledge Letter. The letter type is base on one of two codes the donor will have under their name on the header. If the letter code is CSO, then select the CSO TF Thank You option. If the letter code is POP, then select the Pops TF Thank You option.
4. Change Plan Statues to *Ask Completed (TF)

Patron Makes a Gift with Credit Card

1. First you need to verify the card information on file.
   a. Close Plans and go to the Transactions tab, select the Credit Cards radio button.
   b. Ask the patron to verify the last four digits of the card and the expiration date.
   c. If the credit card is expired or the patron wants to use a new card go back to plans and open a new step by following the directions below.
2. Add a new step once a patron has agreed to make a gift.
   a. Step Type: *Credit Card Gift
   b. Step Description: *Credit Card Gift
   c. Due Date: The day after the pledge was made over the phone
   d. Notes: either to use the card on file or to put the new card and/or expiration date
   e. Save and Close
3. Put the gift amount in the Recorded field
4. Change Plan Status to *Ask Completed (TF)

Patron Declines

1. Add a new step once a patron has declined.
   a. Step Type: *Outbound Call - TF
   b. Step Description: Declined
   c. Completed Date: date of decline
   d. Notes: add the reason the patron declined, if given
   e. Save and Close
2. Change Plan Status to *Declined (TF)

Address Updates

If a patron has an address, phone or email update add a new step to their plan.

1. Step Type: *Address Change
2. Step Description: *Address Change
3. Notes: add the new information
4. Due Date: The day after the call was made
5. Save and Close