



A Moves Management Love Story

Moving prospects through the donor or client life cycle is similar to a good love story: even after the courtship, it's a lifelong journey of maintaining the relationship you worked so hard to build. But what does this truly look like? Regardless of how you interact with donors and clients (in-person, phone, email, social media or various other technologies), building relationships in a healthy manner is a must for your organization's longevity as well as your personal ethics as a gift planner or advisor. We'll discuss how to do this in a caring and thoughtful way, ensuring impact on your organization's mission for year to come.

Learning Outcomes:

- Learn elements of successful relationship building.
- Understand opportunities for relationship building throughout all stages of the cycle.
- Discuss donor and client interactions to further refine practices of healthy relationship building.