



7 STEP PG ACTION PLAN

Organization: _____ Lead Person: _____

Time Period: _____

1) Infrastructure

Action Steps

- 1.
- 2.
- 3.

Key Take-Aways

- 1.
- 2.
- 3.

2) Board Strategy

Action Steps

- 1.
- 2.
- 3.

Key Take-Aways

- 1.
- 2.
- 3.

3) Prospect Strategy

Action Steps

- 1.
- 2.
- 3.

Key Take-Aways

- 1.
- 2.
- 3.

4) Donor Work

Action Steps

- 1.
- 2.
- 3.

Key Take-Aways

- 1.
- 2.
- 3.

5) Messaging

Action Steps

- 1.
- 2.
- 3.

Key Take-Aways

- 1.
- 2.
- 3.

6) Stewardship

Action Steps

- 1.
- 2.
- 3.

Key Take-Aways

- 1.
- 2.
- 3.

7) Training

Action Steps

- 1.
- 2.
- 3.

Key Take-Aways

- 1.
- 2.
- 3.

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Contact Joe Tumolo for a free consultation on how to get you major planned giving program to the next level.



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