



# CASELOAD MANAGEMENT CHECKLIST

## DAILY TASKS



Check gift report + thank donors appropriately

Complete planned stewardship outreach

Identify donor touch points that need to be completed or worked on

Ensure completed donor activities and notes have been updated in the CRM

## WEEKLY TASKS



Review DEP overall - what are your plan priorities?

Review schedule for upcoming meetings; prep

Prep solicitation letters or proposals as needed

Prep outstanding stewardship outreach

Based on monthly review, complete touch points for donors who are behind

Prep additional touch points + communication, as needed

## MONTHLY TASKS



Check donors who made a gift LFY in the next 1-3 months + prep

Review FY variance report or column on the DEP + make plans

Assess additional help or supply needs for upcoming months

Review all goals - ensure you have a proactive ask plan

## QUARTERLY TASKS



Review next quarter's touch points + plan for adjustments

Review next quarter's goals + plan for adjustments

## TWICE A YEAR TASKS



Caseload clean-up + refresh

Clean sweep of data for unassigned donors