

# Spektrix Philanthropy Series:

## Design Next Year's Success Checklist

Create a copy of this document to Design Next Year's Success

### BEST PRACTICE

Mark the column to indicate whether your use of the specific feature is already effective or if you'd like to review and tidy.

Spektrix Feature	Effective	Needs Reviewing
Attributes	<input type="checkbox"/>	<input type="checkbox"/>
Normal Tags	<input type="checkbox"/>	<input type="checkbox"/>
Auto-Tags	<input type="checkbox"/>	<input type="checkbox"/>
Campaigns	<input type="checkbox"/>	<input type="checkbox"/>
Target Amounts	<input type="checkbox"/>	<input type="checkbox"/>
Default Campaigns	<input type="checkbox"/>	<input type="checkbox"/>
Default Likelihood of Success	<input type="checkbox"/>	<input type="checkbox"/>

- I've set a reminder for myself to update my default campaigns in the new fiscal year
- All open opportunities are still actively being pursued
- I've set a schedule to review my open opportunities to close ones that are no longer active

## REVIEWING YOUR WORK

- How often are you going to approach reviewing your work?
  - Monthly
  - Quarterly
  - Mid Year
  - Annually
  
- I've set the following reports on a schedule:

REPORT TITLE	RECIPIENTS

## LOOKING FORWARD

- I have established a goal for **engagement**

<b>Goal outline</b>	
<b>I will measure this using</b>	

- I have established a goal for **efficiency**

<b>Goal outline</b>	
<b>I will measure this using</b>	

- I have established a goal for **revenue**

<b>Goal outline</b>	
<b>I will measure this using</b>	

- I think I need additional training on
  - Customer List and Segmentation
  - Understanding reports
  - Creating auto tags
  - Dotdigital and Email Automations
  - Opportunities Management