



# Summer reset

In fundraising, summer is the season of organization. This summer, a ‘reset’ is not just important—it’s essential. We need to focus and prepare *now* for an uncertain year ahead.

Aperio simplifies your ‘reset’ with a clear roadmap and hands-on support as you:

- Build your new case for support
- Organize your list
- Create your engagement plan

### Build your new case for support

Refresh your case and storytelling to share your relevancy and inspire new and sustainable support from your community.

### Organize your list

Uncover new potential in your database and segment your list to streamline your time management and success in relationship-building.

### Create your engagement plan

Enhance the donor experience and focus your time by creating a comprehensive communications and cultivation plan for the months ahead.

## Summer reset package

An Aperio fundraiser will guide you through the summer reset process through 6 weekly hour-long sessions. Each session will include clear next steps and tools for the week ahead.

\$1,000

### Add-on packages

\$2,500 each

#### Case development

An Aperio writer will facilitate 2 hour-long sessions with your team and create a 'boilerplate' case for you.

#### List organization

Aperio will wealth screen & analyze up to 1,000 records and work with you 2 hour-long sessions to segment the results.

#### Engagement planning

An Aperio expert will facilitate 2 hour-long sessions with your team and create a 6-month engagement plan for you.



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