

**MIT Annual Fund - Annual Leadership Giving Training Checklist**

Topic	Status		Follow-up
	Completed	Additional Training	
<b>Department/Organizational Structure</b>			
Annual Fund Overview	<input type="checkbox"/>	<input type="checkbox"/>	
Alumni Association Overview	<input type="checkbox"/>	<input type="checkbox"/>	
Resource Development Overview	<input type="checkbox"/>	<input type="checkbox"/>	
School/Program Based Overview	<input type="checkbox"/>	<input type="checkbox"/>	
Meet with OLG Counterpart(s)	<input type="checkbox"/>	<input type="checkbox"/>	
Meet with 2-3 School based Counterparts	<input type="checkbox"/>	<input type="checkbox"/>	
Meet with AA Regional Counterpart	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Computer/System Set-up/HR</b>			
HR Paperwork completed	<input type="checkbox"/>	<input type="checkbox"/>	
Met with AA HR Representative	<input type="checkbox"/>	<input type="checkbox"/>	
Kerberos Account	<input type="checkbox"/>	<input type="checkbox"/>	
MIT ID Card	<input type="checkbox"/>	<input type="checkbox"/>	
Computer Set-up	<input type="checkbox"/>	<input type="checkbox"/>	
Desk Phone Set-up	<input type="checkbox"/>	<input type="checkbox"/>	
Cell Phone Set-up	<input type="checkbox"/>	<input type="checkbox"/>	
MIT Email Setup	<input type="checkbox"/>	<input type="checkbox"/>	
MapPoint Installed	<input type="checkbox"/>	<input type="checkbox"/>	
<b>MIT Information/Insight</b>			
Campus Tour	<input type="checkbox"/>	<input type="checkbox"/>	
MIT Timeline Review	<input type="checkbox"/>	<input type="checkbox"/>	
Course # Memorization	<input type="checkbox"/>	<input type="checkbox"/>	
Schools, Programs and Institutes	<input type="checkbox"/>	<input type="checkbox"/>	
Campaign Toolkit Navigation/Resource	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Advance Web Training/System Navigation</b>			
Advance Web #1: Introduction	<input type="checkbox"/>	<input type="checkbox"/>	
Advance Web #2: Giving overview	<input type="checkbox"/>	<input type="checkbox"/>	
Advance Web #3: Reports, lookups & Clipboards	<input type="checkbox"/>	<input type="checkbox"/>	
Advance Web Unverstanding:	<input type="checkbox"/>	<input type="checkbox"/>	
- Entering Tasks			
- Utilizing Clipboard and VCR to enter tasks			
- Utilizing Clipboards and Context Sensitive Reports			
- Entering a Contact Report			
- Putting a Prospect in Qualification			
- Entering/Editing/Closing a Proposal			
- Utilizing Simple Lookups for prospects			
Outlook Navigation and Usage	<input type="checkbox"/>	<input type="checkbox"/>	
Email merge using Outlook, Word, and Excel	<input type="checkbox"/>	<input type="checkbox"/>	
Using MapPoint to map prospects	<input type="checkbox"/>	<input type="checkbox"/>	
DOFile entry and viewing	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Prospect Management</b>			
MIT Prospect Portfolio Process	<input type="checkbox"/>	<input type="checkbox"/>	
ALG Portfolio Practices	<input type="checkbox"/>	<input type="checkbox"/>	
Regional Territories in OLG, ALG, AA	<input type="checkbox"/>	<input type="checkbox"/>	
Prospect Stages	<input type="checkbox"/>	<input type="checkbox"/>	
Prospect Rating System	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Prospect Visits</b>			
Contact Report Guidelines	<input type="checkbox"/>	<input type="checkbox"/>	
Task Entry Guidelines	<input type="checkbox"/>	<input type="checkbox"/>	
Mock Visits	<input type="checkbox"/>	<input type="checkbox"/>	
Joint Visit(s) with OLG, ALG colleagues	<input type="checkbox"/>	<input type="checkbox"/>	
Proposal Process/WBRS packets	<input type="checkbox"/>	<input type="checkbox"/>	
Prospect Follow-up	<input type="checkbox"/>	<input type="checkbox"/>	