How to Manage Affiliated Prospects in Raiser’s Edge

If spouse pairs each have their own constituent record in Raiser’s Edge, that doesn’t necessarily mean they are separate prospects. In fact more often than not, the pair gives as a couple. There are also companies in RE that have separate constituent records for multiple branches or offices, but the company gives as a single entity.

In those two cases, it’s important that the Primary Manager for those prospects flags the other spouse or affiliated company record(s) so that other development officers don’t try to cultivate them. Here’s how to manage that in RE:

1. Proposals and actions should only be added to one of the records. You decide which spouse or company record they should be added to, just make sure to be consistent and enter them all on the same record.

2. On the related spouse or organization records, on the prospect tab, add a Prospect Classification of “Affiliated with Primary Prospect”. This flag will let other DOs know not to contact the affiliated person or company.

3. Request from Research to be added as a “Relationship Resource” on all affiliated records (spouse or other company records).

4. Before you contact a new prospect, **ALWAYS** check their prospect tab and relationships tab to see if they have the “Affiliated with Primary Prospect” classification and a DO listed as Relationship Resource. If they do, then that DO is already working with the prospect as part of a spouse pair or company.

   **NOTE:** It’s a good idea to contact a Relationship Resource if one’s listed regardless of whether they have the Affiliated prospect classification or not.

   **See the Example on the next page.**
Lawson is Josh’s Primary Manager and he knows that Josh and his wife Andrea give as a couple. Lawson enters all actions and proposals on Josh’s record only.

Lawson enters a Prospect Classification of “Affiliated with Primary Prospect” on Andrea’s record.

Lawson requests to be added as a Relationship Resource on Andrea’s record.

A DO looking at Andrea’s record will know she and Josh give as a couple and that Lawson is working with them.