



## GUIDELINES FOR ENTERING INTERACTIONS

### WITH WHOM DID YOU MEET/SPEAK, AND WHAT WAS DISCUSSED

#### Standard interactions to enter:

- PSMs: Personally Scheduled Meetings
- Follow-up thank you letters
- Meaningful phone conversations
- Campus tours
- Business partner interactions
- Notes, emails or calls of a complimentary nature
- Notes, emails or calls of concern or complaint received (substantive)
  - If the person was upset, document why and to what extent you were able to resolve the issue.

#### Enter at your discretion:

- Casual phone conversations
  - Simple questions or inquiries
  - Transactions
    - For example, registering for a basic event is probably not interaction-worthy, but a traveler calling with detailed questions about a trip might merit an interaction.
    - Calling in to update an address does not merit an interaction, but if it evolves into a conversation, then perhaps it does.
- Prospective venue client tours
- Conversations at events
  - Example: You hosted a table at an event and had a great conversation with a few of the people with whom you sat.

#### Do NOT enter:

- Meetings or conversations of a confidential nature.
- Information about gift amounts, sensitive personal or health information, or opinions.
  - If any of this information needs to potentially be documented for business purposes, please contact your foundation liaison to request assistance.

#### Reminders:

- Newspaper ready
- Never disclose gift information
- Never disclose confidential personal information (health, family issues, job issues, etc.)
- Refrain from offering opinions and commentary; keep it simple and factual

For instructions and examples, please refer to your [AliCRM Essentials Guide](#).

To pull a list of all interactions for a certain Owner during a specified date range, refer to this [guide](#).