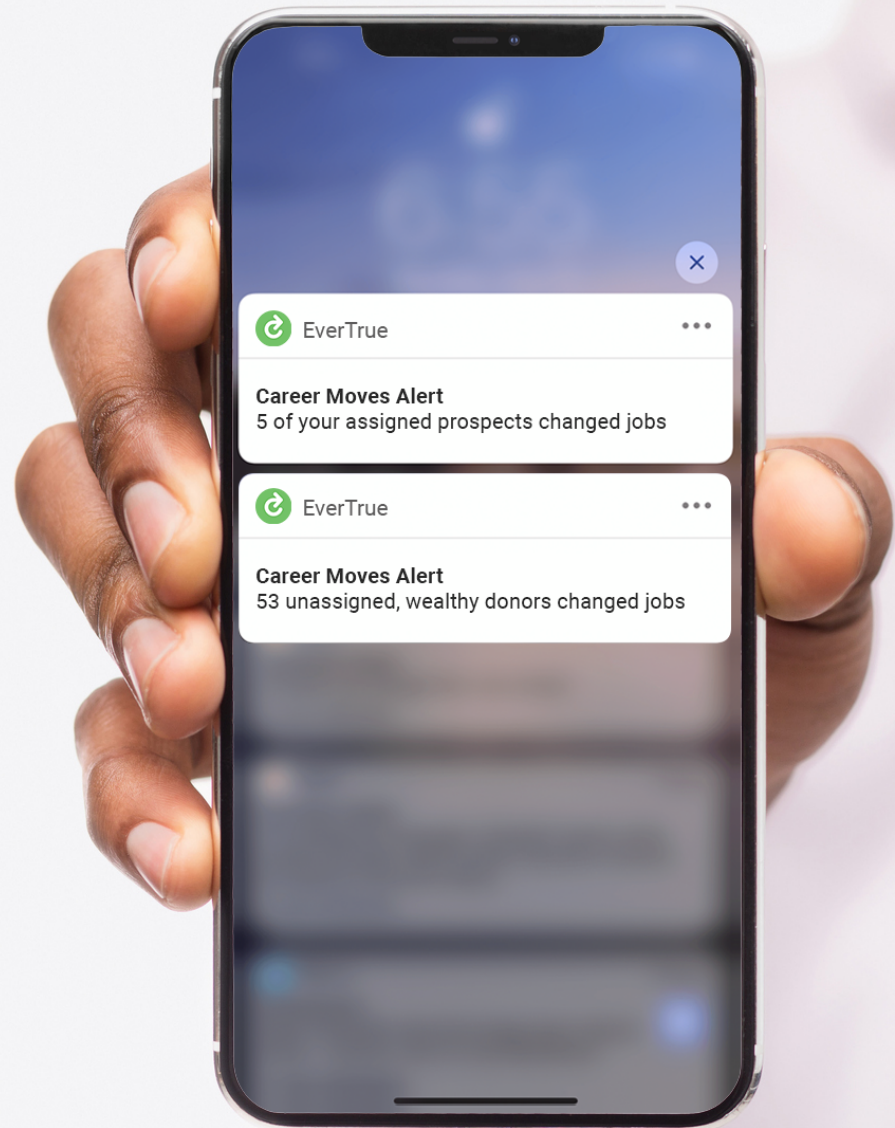


Playbook

Career Moves by EverTrue



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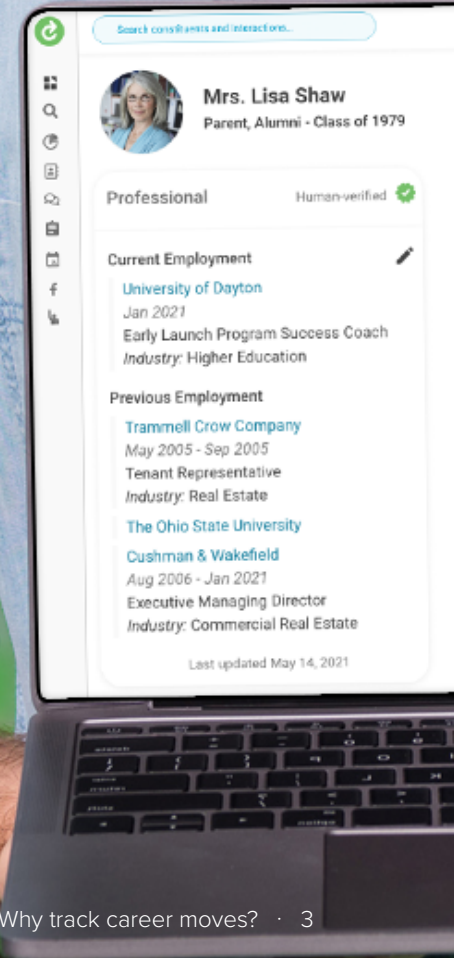
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We've got the moves

It's no secret that career data can help us get to know our constituents. Who just took a new board seat, started a volunteer position, accepted a new role, or got promoted to the C-Suite? Advancement teams equipped with this information can make timely solicitations, build relationships at critical career points, and provide support to alumni that need it most. Unfortunately, this information has historically been difficult to get and even more difficult to keep up-to-date. But not anymore.

Why track career moves?



In a survey of EverTrue customers...

74%

of respondents said they
rely on career data



use it as a foundational
data source for engagement
and fundraising efforts

Yet...

67%

only update career data
when they are notified by
an alum or researcher

When was the last time your team updated alumni career information? If you're like most higher education institutions, you've only updated career information retroactively on a one-off basis. Maybe you rely on the rare moment when an alum proactively sends you a job update. Or maybe you've waited months (and invested a lot of dough!) for a vendor to deliver data that your team then had to review, match, and load into your CRM. Even then, the information is almost immediately out of date as constituents are constantly changing jobs.

According to the [Bureau of Labor Statistics](#), the median amount of time that wage and salary workers had been with their current employer was 4.1 years as of January 2020. So, if you're only updating career information in your system on a one-off basis or every few years, it's likely already outdated.

Tracking job changes has historically been a difficult, manual, expensive, and time-consuming task. And most institutions aren't even scratching the surface with manual updates. In fact, we've found that 98% of recent job changes are not in the database.

We'll fix that. Introducing Career Moves by EverTrue.

"The up-to-date data we get from EverTrue's Career Moves is incredibly accurate. It's the highest quality career data I have tested and seen from any vendor, which allows the OSU Foundation to immediately put this new information to work."



Mark Koenig

Chief Innovation Officer and VP
of Technology, Oregon State
University Foundation

Career Moves by EverTrue automatically delivers human-verified job changes to your database every 90 days.

We handle the tracking, matching, and delivery. You get to work with fresh, up-to-date insights so that you can identify new prospects and build better relationships with your alumni as they progress in their careers.

We'll tell you who just landed a C-Suite position (and is now a major gift prospect), who took a new board seat, who accepted a new volunteer position, and who got promoted within their current employer and deserves a "congrats" note.

You'll see all of these noteworthy changes in EverTrue's TrueView constituent profiles under the "Enrichment" tab, and you can export these details anytime to update your CRM.

Our favorite part? You'll be able to incorporate these career changes into your Saved Searches and Filters in EverTrue for best-in-class segmenting capabilities. And, you can opt to receive automatic alerts as alumni switch jobs. Imagine notifying alumni with recent job changes in Finance about an upcoming webinar on cryptocurrency investments featuring a star business school professor.

- ✓ Timely insights
- ✓ Automatic alerts
- ✓ Exportable updates

How does it work?

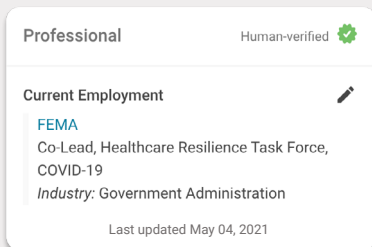




We monitor **TrueView data** for
common career move indicators



**Real people verify the career
moves and send public data
back to EverTrue**



**Updates are mapped back
to your constituents**

Insights that propel action

We'll start off by doing an optional one-time screening to update all your alumni profiles with the latest available employment information. Then, we'll keep them current by applying human-verified updates every 90 days so you can stay in touch with alumni as they shift careers and industries.

Using our TrueView insights and proprietary matching technology, we can detect when a constituent may have made a career move, and then proactively check to see if they've changed jobs.

We use real people, LinkedIn, and other public sources to verify changes, giving you super-accurate, near real-time data. And all of that data flows right back into EverTrue so your team has easy access to always-fresh saved searches and alerts to help you identify the best prospects.

What's the ROI?

"Having EverTrue notify me of a job change or promotion on my phone has made a big difference in my outreach. I can quickly check in with prospects when there is an exciting change happening in their world and stay connected in real time."



Cara Bauer
Leadership Gifts Officer,
Bentley University

Let's do some math

Say 10% of your alumni body changes jobs this year. (This is what we've seen as an average across EverTrue customers.)

If you have a 200,000-member alumni body, that's 20,000 job changers.

Statistically speaking, one thousand (5%) of these will be in the C-Suite.

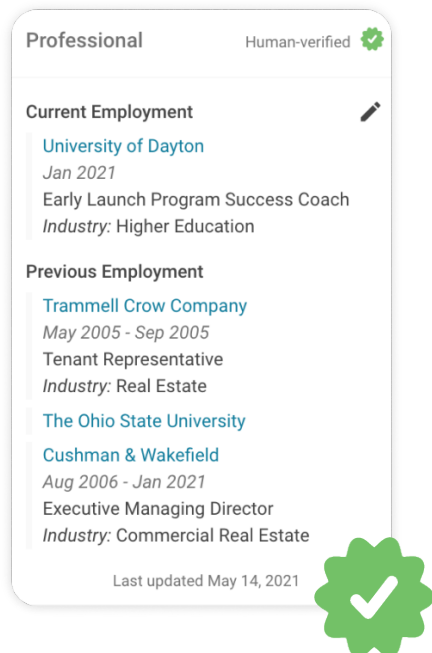
If just 1 in 4 of those people (250 total) become assigned prospects after initial outreach, you will have created at least \$3.125MM in major gift pipeline.

And from what we've seen, that's a conservative estimate.

The bottom line is that you're missing career data for countless alumni right now. And there are so many more alums who will change jobs this year. Career Moves will enable your team to do their best work by utilizing the most accurate data available.

You've got the moves, what now?

Our early adopters have provided a handful of examples of the way they use Career Moves. Here are just a few:



- ✔ **Setting up saved searches to notify gift officers when someone in their portfolio changes jobs.** Reaching out to congratulate constituents on a promotion or career change is a huge opportunity to foster more meaningful relationships and communicate to alumni that you truly care about them.
- ✔ **Partnering with Career Services to provide assistance.** This includes connecting new graduates or current students with mentors and potential employers to benefit multiple parties. This is an effective way to build relationships and institutional affinity with current and future donors.
- ✔ **Tracking the 5% of career changers that are making a C-Level move.** With a steady stream of updated career moves, your team can easily review prospect ratings and make sure newly rated prospects are assigned to gift officer portfolios.
- ✔ **Identifying potential campaign volunteers** or leaders for interest-specific campaigns, **tracking employers** with a large number of alumni, **developing invite lists** for industry-specific events, **communicating with alumni** at publicly traded companies going through organizational changes, and more.

Let's get moving

ellucian.



blackbaud

"It's clean, verified, manageable data that's easy to get back into our database. It allows us to immediately take action to follow up with our graduates, notify assigned gift officers, update prospect ratings, and more."



Jessica Kuhlman

Sr. Dir. of Donor Strategy and Analytics, West Point Association of Graduates

This all sounds great, right? But how much work on the front end will it require? Arguably one of the best parts of Career Moves is how easy it is to set up.

Here are some business-related questions to ask internally as you consider Career Moves by EverTrue:

✓ **How does Career Moves work in relation to other tools or complement tools we already use?** Remember that you can export Career Moves updates from EverTrue and upload them to your CRM if you choose.

✓ **How do you want people on your team to use Career Moves data?** We've compiled 9 of our favorite use cases [here](#).

Downloads

Data	Update Frequency	File Date	Download
Career Moves (Verified Updates) Only includes records where matches have been verified	📅 3 months	Apr 27, 2021 2:04 PM ▾	📄
Career Moves (All Updates) Includes records where a match could not be verified with certainty	📅 3 months	✓ Apr 27, 2021 2:04 PM Apr 27, 2021 2:04 PM Oct 06, 2020 10:10 AM	



From: Lina

Subject: Q1 Career Moves Digest

Hi team,

In case you missed it, there are two new Career Moves files available as of April 8th.

Here are some highlights:

- ✓ Of 1,061 moves there were 532 new jobs, 423 promotions, and 7 retirements
- ✓ Most common company for career move is Bain Capital
- ✓ Most common title for a move is Account Executive
- ✓ Most common industry for a move is Financial Services



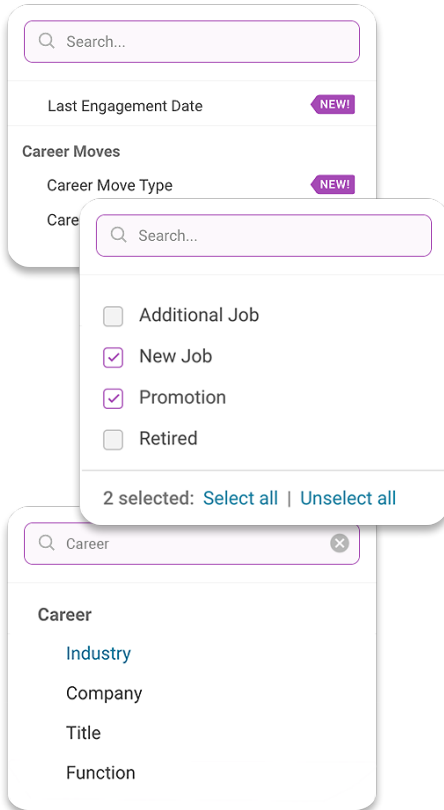
CSMs summarize career updates and give actionable suggestions for using the data

Once you decide to get Career Moves, you'll just need to have your constituent data uploaded in the EverTrue Console before we can get started. This can be done by your Advancement Services team.

If you're an EverTrue customer with constituent data already uploaded into your EverTrue Console, all you need to do is reach out to your Customer Success Manager to get started with enabling this feature.

Your CSM will ask you to provide information about any institution-affiliated LinkedIn pages your alumni may be connected with. Then, you'll have your results loaded in the EverTrue platform within 30 days. We recommend doing an initial screening to get all alumni career fields up to date. After that, we will run updates every 90 days or so that will automatically push to EverTrue.

Here's what to expect from Career Moves:



- ✓ Automatic Career Moves and updates that are not in your current database.
- ✓ Access to Career Moves updates within constituent TrueView profiles, with new updates added every 90 days.
- ✓ A quarterly Career Moves digest with a summary of career updates about your constituents and actionable suggestions for using the data.
- ✓ Lots of time saved as we handle tracking the career changes, transcribing the data, and matching information to constituent records for you!

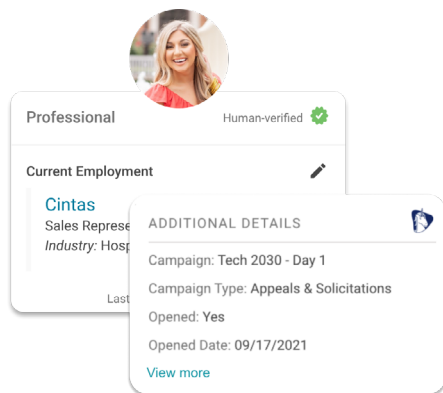
Once you're up and running, you'll be able to filter by "Career Moves Type" and "Career Moves Date" within your constituent tab in EverTrue. "Career Moves Type" allows you to filter by the career change that happened, including constituents who took on an additional job, started a new one, got promoted, retired, went back to school, or became unemployed. The field "Career Moves Date" provides a date range for these changes, so you'll be able to look at all these moves within a specific time frame.

With updated Career Moves, you'll also be able to search and filter by company or industry and have complete confidence in the accuracy of your data.

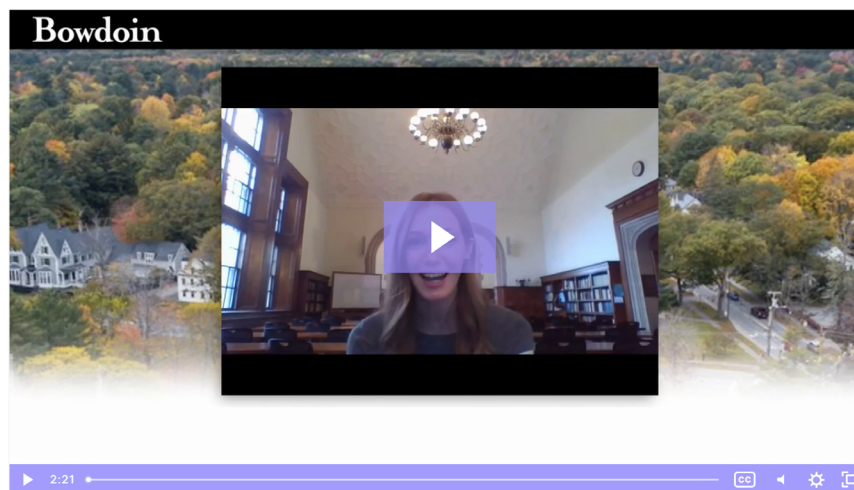
Yes, it's that simple.

Turn Career Moves into ThankViews – Automatically

Turn EverTrue Career Moves data into one-on-one ThankView videos to surprise and delight your alumni:



- ✓ Create dynamic 1:1 or 1:many outreach lists in EverTrue.
- ✓ Setup a campaign in ThankView for each list.
- ✓ Record videos one-by-one or upload a pre-recorded message.
- ✓ Use new engagement data to power future prospecting.



Are you ready?

If you're not yet an EverTrue customer, [contact us](#) about getting started today!

For EverTrue customers that are ready to get started with Career Moves, go ahead and reach out to your Customer Success Manager. They'll be more than happy to get you up and running ASAP.

Need more Career Moves help? Check out the help articles below or email genius@evertrue.com for help with any technical questions.

■ [About Career Moves](#)

■ [Getting Started with Career Moves](#)

■ [Career Moves Export Fields](#)