



OVRTURE · THE CHAMPION'S BRIEF

Is Overture worth 30 minutes of your team's time?

Whether it fits, what the call answers, who to bring, and what to have ready.

What Overture does

01

Gives each donor a personalized report on their gift, or a proposal for the next one.

02

Draws on the donor and fund data you already keep.

03

Shows you which donors opened theirs and what they read.

Is this for your team?

A good fit if most of these sound like your office.

☐ You send donors reports on what their gifts did, or you want to. Today that might be PDFs, print, an agency, or nothing formal yet.

☐ You want your best prospects to get a proposal built for them. Most Overture clients start with reports.

☐ Your donor and fund data lives in a CRM, or in files your team can export.

☐ One person can coordinate the setup.

Built for teams of every size.

One donor relations officer and a university with a dozen schools run the same platform.

ONE DESK...

One officer with a reporting calendar and a stack of endowments to steward.

...TO HUNDREDS

A university with a dozen schools, a health system with service lines, a foundation with chapters.

Twelve weeks to go live.

CONTRACT



- 01 Twelve weeks from contract to a live system, and about a working week of your team's time across them.
- 02 Count back twelve weeks from the start of your next reporting season to find the date you'd need to sign by.

The hours for each role, and what happens if the person who brought Overture in moves on:
overture.com/first-90-days/

What a 30-minute demo answers

Cory Andersen walks through the real platform on a program like yours: a donor website, an impact report, and the engagement data behind them. You leave knowing whether it fits.

Most teams bring one of these questions:

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- 01 Will it fit the system we already run?
 - 02 Can this actually scale for us?
 - 03 Who on our team ends up writing it all?
 - 04 Will our own people actually use it?
 - 05 How do we prove donors are engaging?
 - 06 What happens to our print report?
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Bring the one you care about most, and the call starts there.

Who to bring

01

The one or two people who would use Overture most.

02

IT or your VP, if they will have questions. Or book a second demo for them later.

What to have ready

All of it is optional. After you book, Cory sends a short survey that covers the same ground.

01 Your role, and who else will weigh in on a decision

02 The CRM your office uses

03 How you report to donors today, and roughly how many donors you steward in a year

04 The frustration you'd fix first

05 Whether proposals for prospects matter as much as reports

06 Your timeline, and what a good year would look like

Price first? Enter your users and reports a year at overture.com/pricing/ and a price comes back by email.

A note to send a colleague

Copy it, change what you like, and send it.

SUBJECT

30 minutes on how we report to donors

I'd like us to take a 30-minute demo of Overture. It gives each donor a personalized report on their gift, or a proposal for the next one, drawing on the donor and fund data we already keep. It also shows us which donors opened theirs and what they read.

The call is with Cory Andersen and takes about 30 minutes. Could you join? We can book a time at overture.com/demo/.

Book a time

overture.com/demo/

About 30 minutes with Cory Andersen, Account Executive.

cory.andersen@overture.com



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