

# Givzey Launches Givzey Collaborator: First Smart Gift Agreement Workflow Tool for Major and Complex Gifts

*Fundraising's First All-in-One Intelligent Gift Documentation Platform Introduces Collaborator: Smart Workflow Tool to Accelerate Major & Complex Gifts*

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[/EINPresswire.com/](https://EINPresswire.com/) -- [Givzey](#), fundraising's first and only all-in-one Intelligent Gift Documentation

Management Platform, today announced the launch of Givzey Collaborator, a revolutionary solution to document major and complex gifts. As the first Smart Gift Agreement Workflow tool, Givzey Collaborator is a customizable, flexible, and powerful solution that makes Givzey the single end-to-end solution for all types of gift documentation, as the company seeks to spread digital transformation to fundraising's 'Messy Middle.'

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*Adam Martel, CEO of Givzey*

Relying on advancement services, donor relations, and legal teams to manually generate, revise, edit, approve, and execute major and complex gift agreements slows the process of closing gifts and booking revenue. In turn, for each day it takes to navigate this process, unnecessary risk is introduced to the donor experience, impacting sentiment and the reliability that the gift will close. At the same time, many nonprofit organizations do not have the

time nor resources to find a solution to remove the friction in processes around gift agreements and instead accept the 'Messy Middle' as an unavoidable necessity. Givzey Collaborator transitions nonprofit organizations from groups of decentralized tasks and manual effort to close major and complex gifts to an all-in-one centralized process.

“Givzey's Intelligent Gift Documentation Platform has already revolutionized multi-year giving and gift documentation for nonprofits across the country, resulting in increased revenue, scaled



Givzey - Fundraising's First All-in-One Intelligent Gift Documentation Platform

multi-year giving strategies, improved donor retention, and a more donor-centric giving experience,” said Adam Martel, CEO, Givzey. “With our early customers, we noticed how much time it takes between when a donor verbally commits to their gift and when that gift closes, which introduces unnecessary risk to the donor experience. The Smart Gift Agreement Workflows inside Givzey Collaborator create organization, speed, flexibility, and control out of what was traditionally a chaotic, disjointed, and risky process that had the potential to erode the donor experience. Givzey Collaborator is an innovation that revolutionizes how fundraisers formalize a donor’s relationship with an organization and our team is proud to, once again, lead digital transformation in the nonprofit sector.”

Most nonprofit organizations use a flat, static, paper-based, and complex process to document and manage transformational gifts. Whether it’s a naming opportunity, establishing a new fund, creating an endowment, documenting a gift with unique restrictions, or otherwise, these complex agreements are critical for the highest tier of gifts that generate the most revenue for nonprofits. While traditional gift agreement workflows are slow, paper or PDF-based, and bottlenecked by bureaucracy, the Smart Gift Agreement Workflows inside Givzey Collaborator are digital, automated, intelligent, and intuitive so organizations can close gifts faster and elevate the donor experience.

Here’s how Givzey Collaborator Smart Gift Agreement Workflows for major and complex gifts work:

#### Document Creation with Smart Templates

The first step of Givzey Collaborator makes version control and template management a dream for gift administrators with pre-approved drag-and-drop sections that create the building blocks for each gift agreement template. A series of custom questions then guide gift officers to the template agreement that matches the exact criteria of the gift. Finally, smart dynamic fields within each section guide gift officers through completing the draft gift agreement and provide boundaries for what can be edited.



## Smart Routing Automations & Smart Roles

Next, Givzey Collaborator centralizes and streamlines disjointed and complex routing and approval scenarios with dynamic smart routing that notifies the right stakeholders, both internal and external, to take exactly the right action at the right time. Default routing is attached to each Digital Gift Agreement, which can be adjusted for the unique needs of an individual gift. Once reviewed by a gift administrator, Givzey Smart Routing uses bidirectional automation to usher the approval process each stakeholder for editing, revisions, and approvals – all while maintaining up to date version controls. Automated notifications keep agreements moving swiftly through the process, and gift administrators maintain full control over approving edits.

## eSignatures

The last step in the Givzey Collaborator Smart Gift Agreement Workflows are easy to sign eSignatures, which formally close gifts and elevate the process to a world-class donor experience. It's so easy for both the donor and internal stakeholders to sign an agreement that 72% of Givzey Smart Gift Agreements are signed within 24-hours of sending, and 92% within a week.

## Built to Integrate

Givzey is built to work with the software and processes organizations use today. Givzey integrates with all CRMs, including Blackbaud, Salesforce, Ellucian, and more – offering the opportunity to migrate legacy pledges into Givzey, accurate and automated exchange of pledge payments, and more. Integrations can be completed in less than a day, providing a clear path to ROI.

## Givzey's 10x Guarantee

Givzey understands that the nonprofit sector needs technology partners that are accountable not just for innovation, but also for outcomes and impacts. That's why we offer the Givzey Guarantee, which is completely based on ROI. Givzey guarantees that customers will 10x the value of their Givzey contract with gift agreements under management in the first year, or the second year is free.

With Givzey Collaborator's Smart Gift Agreement Workflow tool for major and complex gifts, you can get more value out of your agreement workflows, with added speed, control, and visibility.

[Schedule a demo](#) to learn more about Givzey Collaborator and Smart Workflows, today.

## About Givzey

Givzey is a rapidly-growing, Boston-based Intelligent Gift Documentation Management Platform, built by fundraisers for nonprofit organizations. As fundraising's only all-in-one Gift Documentation Solution, Givzey was the first to launch Smart Gift Agreements and Smart Workflows that empower fundraisers to easily and immediately formalize and book pledges of all sizes, fundraising leaders to scale multi-year giving strategies to all levels of giving, and equip advancement services professionals with streamlined tools to close gifts faster. Document gift

intent. Formalize verbal agreements. Create organization from Chaos. Increase bookable revenue today.

Kevin Leahy

Givzey

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