

▶ WELCOME TO THE SUPPORTER JOURNEY WEBINAR SERIES!

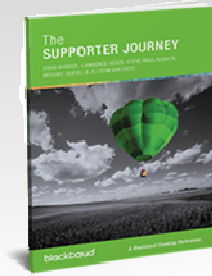
Tiffany Crumpton

Senior Marketing Manager and Supporter Journey Host

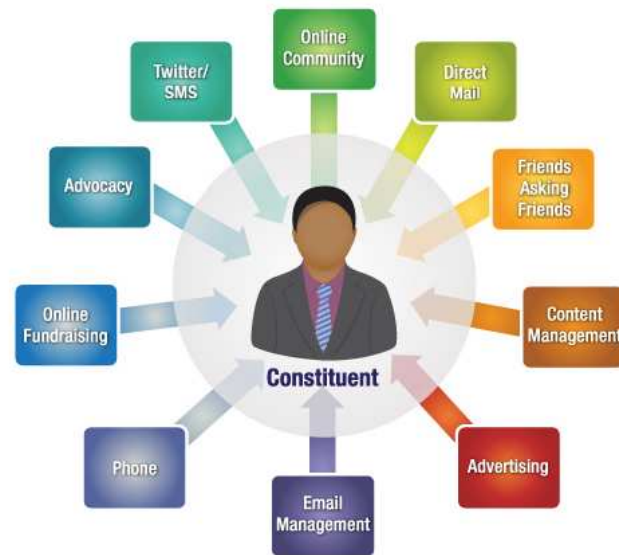
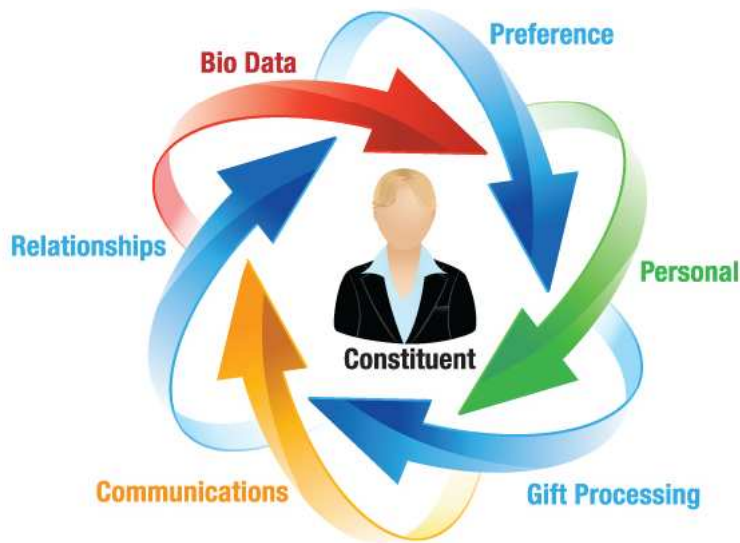


blackbaud[™]
your passion > our purpose

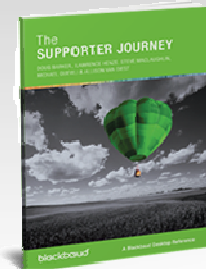
Do you have what it takes to put your supporter journey in motion — and keep it going strong?



analyze + identify segment + target engage + communicate appreciate + retain
————— measure + manage —————



► CAST OF CHARACTERS



Michael Quevli, Senior Consultant with Target Analytics
Analyze & Identify, today



Lawrence Henze, Senior Consultant with Target Analytics
Segment & Target, June 12th @ 1pm



Allison Van Diest, Multi-channel Marketing Expert with Blackbaud
Engage & Communicate, June 28th @ 1pm



Doug Barker, Principal, Barker & Scott
Appreciate & Retain, July 12th @ 1pm



Steve MacLaughlin, Director of Internet Solutions, Blackbaud
Measure & Manage, July 31st @ 1pm

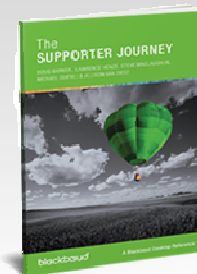


► **ANALYZE & IDENTIFY**

**Three Steps to Understanding Your Prospects
and Supporters**

Michael Quevli, *Senior Consultant*
Target Analytics, a Blackbaud company

► This Session's Agenda and Objectives



Why is it important to analyze and identify your prospects

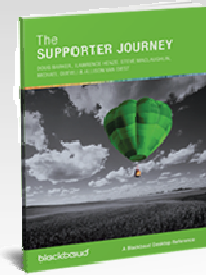
Determining the steps involved in the initial process

- Database
- Identify and analyze
- Creating a three-dimensional view of your prospect

Resources that allow you to be strategic

- Predictive Modeling
- Wealth Screening
- YOU!!!

► Questions To Ask Yourself



Are all your donors giving at their maximum potential?

- Benefit can be reaching your fundraising goal quicker and easier
- Cost can be loss of major gift prospects

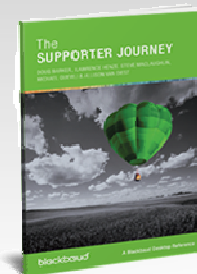
Are you reaching the right donors for the right project?

- Benefit can be increasing the affinity of your donors
- Cost can be missing out on new prospects/donors

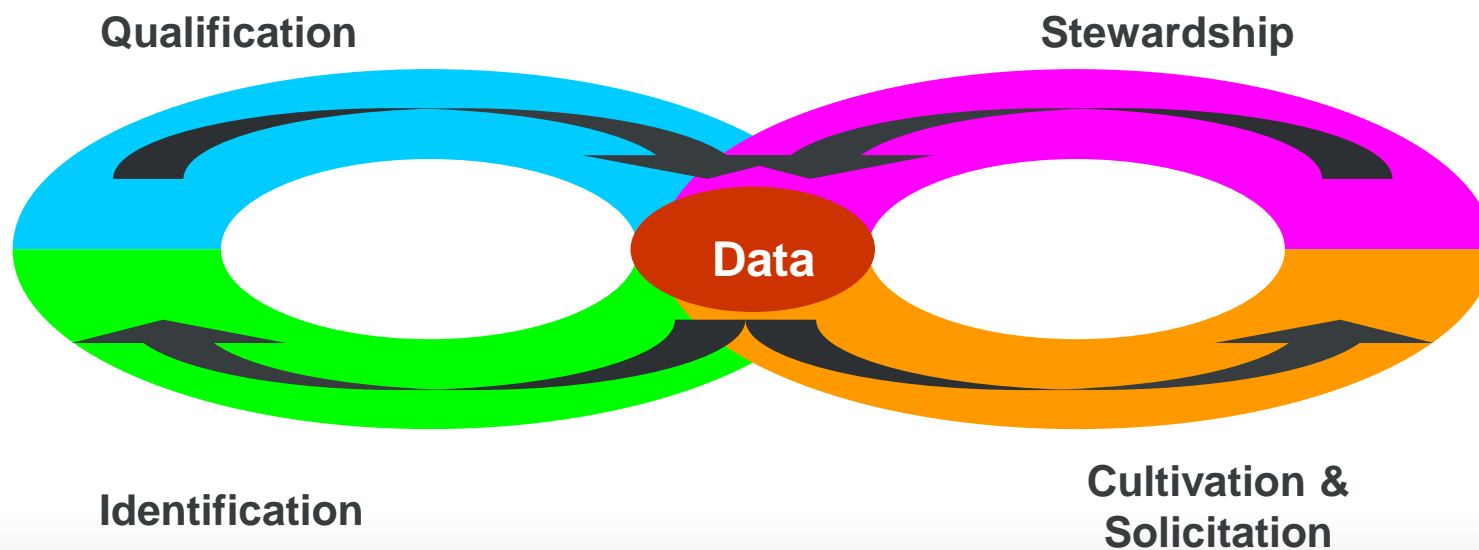
Do you really know your constituents?

- Benefit can be that your donors stay loyal longer
- Cost can be losing prospects to other non-profits who do know them

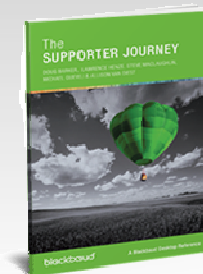
► Step 1 – Start With Your Database



- The first step in gaining that 3-dimensional view of your prospect begins with your database.
- Everything you do always brings you back to your database.

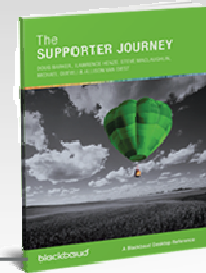


► Step 1 – Start With Your Database



- You need to be sure your database always maintains current information on your prospects and donors.
 - Demographic data such as address, email, phone
 - Giving to the institution
 - Contacts and interactions with your constituents
 - Wealth and Propensity ratings
- What additional information is important for you to have?

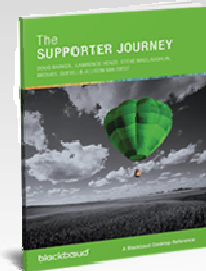
► What Types of Information Could You Be Gathering?



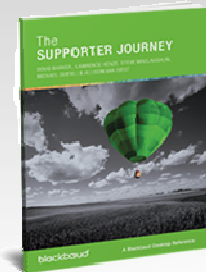
- Board membership/trustees (ideally, each board—or similar involvement—would have its own field; examples might be alumni board, ladies auxiliary, volunteer board) (y/n or past/current)
- Major detail (for example: math, English, biology, etc)
- Additional degrees/majors/minors
- Honorary degree recipient? (y/n) and Honorary alum? (y/n)
- Awards/honors (y/n for variety of academic recognitions – Phi Beta Kappa? Summa Cum Laude?)
- Marital status
- Married to an alum or board member, staff, faculty? (y/n)
- Other family relationships with organization
- Recognition societies (including those that require intentional enrollment—not just based on \$)
- Event attendee (y/n – perhaps within date range or type of event, for example – Attended event since FY02)
- Reunion attendee (y/n – or number of times)
- Trip/tour participant
- Active pledge
- Development volunteer? (y/n)
- Children (names if possible)

► What Types of Information Could You Be Gathering?

- Prospect management stage (qualification, cultivation, solicitation, stewardship)
- Last contact date (or date of last personal visit)
- # of personal visits (by development staff)
- Athletic participation
- Student leader/student involvement indicator
- Athletic ticket holder/season ticket holder/etc
- Fraternity/sorority member
- Dorm or campus housing
- Solicitation restrictions
- Planned Giving Interest (indicated plans to include or has included in estate)
- Planned Giving donor (documented planned gift)
- Interest codes (ex: performing arts; science; specific program, etc)
- Email for life account? (y/n)
- Member of online community? (y/n)
- Other family relationships with organization
- Campaign interest code
- Scholarship/financial aid recipient
- Band member
- Gives through third party (ex: Fidelity; community foundation)
- Ticket buyer



► Segmenting Your Database



Focusing on your entire database is intimidating and frankly overwhelming.

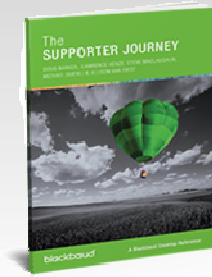
You want to be identifying who will be your best major gift prospects, annual fund prospects, campaign prospects, and planned giving prospects.

One of the best solutions can be predictive modeling.

Most institutions don't have the expertise, time and data to achieve this.

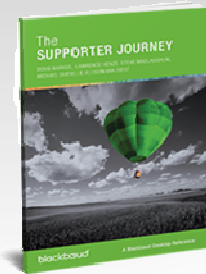
To gain additional insight on predictive modeling – sit in on the next session led by Lawrence Henze.

► Step 2 – Identify and Qualify



- There are many ways to identify prospects for your portfolio. We talked briefly about likelihood which incorporates predictive modeling and examining internal documents on your prospects.
- The next area you need to concern yourself is around capacity.
- This can be accomplished in three ways –
 - Traditional prospect research only
 - Wealth screening/Predictive Modeling only
 - Combination of both

► Step 2 – Identify and Qualify



Traditional Prospect Research Only

- Thorough
- Time intensive
- Can be costly due to fee-based resources

Wealth Screen/Predictive Modeling Only

- Quick
- Cost effective
- Can produce a large number of initial results in a shorter time than research only

Combination

- Thorough
- Strategic

▶ WEALTHPOINT® DATA SOURCES



Hard Asset Data



Employer and career information, compensation, private company stock ownership, management biographies



REUTERS

MarketGuide profiles: biographical and financial data on corporate officers and directors



THOMSON REUTERS

Public stock holdings/transactions by corporate officers, directors, major shareholders; transaction histories, last-traded stock prices through BATS Exchange



CoreLogic

Primary and secondary holdings of real estate, estimated property values, including properties in trusts



Detailed self-reported biographical information including education, interests, children, etc.



Presence of luxury items like planes, yachts, and other indicators of wealth

Wealth Indicators



GUIDE STAR

Nonprofit officers and board members identification, private/family foundations



Detailed records of charitable donations including gift type, size, date, and recipient (through 2010)



The largest collection of public donations available with more than 60 Million public donations (ongoing)

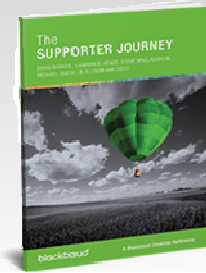
Philanthropic Interests

FEC



In-depth information on more than 2 Million federal elections contributions including amount and recipient

► Step 2 – Identify and Qualify



It is not necessary to have a complete profile on a prospect. All you need to make that initial call is the following:

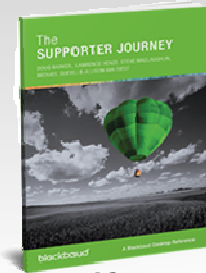
- Contact information
- Connection to the organization – giving, constituency, etc...
- Basic hard asset data – real estate, private company and/or public company

Qualifying prospects on basic hard assets can be accomplished in approximately 15 minutes depending on the amount of information returned from a wealth screening.

Ask yourself what asset amount or gift capacity level qualifies you to pick up the phone and call a prospect?

It is tempting to review all the data but not necessary during this phase of the development cycle.

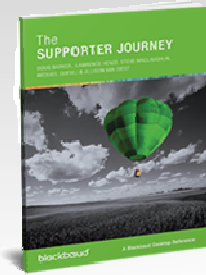
► Confirming The Big Three – Real Estate



- Be sure to look at the details of the property holdings and ask yourself the following questions –
 - Are there additional properties to confirm? If so review the confirmed properties first as they will assist you in confirming those that are only identified.
 - Does the property evaluation appear to be accurate? Check out sites that provide comparable market values such as zillow.com and yahoo comparable market value.
 - When was the property purchased?

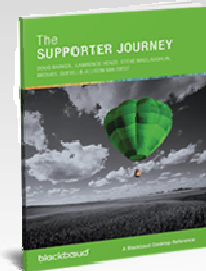
► Confirming The Big Three – Private Company

- Be sure to look at the details listed in a D&B record
 - First of all remember you can report as much or as little as you want if it is a private company
 - Is it public or private?
 - Type of business – SIC code
 - What is the job title of the prospect?
 - Percentage of ownership – don't assume if it says zero that it is indeed zero.
 - How long has the company been in business?
 - See if they provided biographical/career history
 - What do they report as sales? -- Don't assume!!!
 - Make edits based on your immediate knowledge and make notes based on what you don't know.

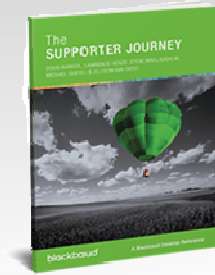


► Confirming The Big Three – Public Company

- An insider for a public company can either own 10% or more, is one of the top five executives or sits on the board of directors
 - When was the last transaction date? This can help provide insight on whether they are still currently an insider
 - What is the value of direct stock ownership?
 - Do they have a great deal of indirect stock? Don't assume it can be counted
 - Look at the Filer ID.



► **STOP!!!!!!!**



Do not continue the research process no matter how great the additional information is.

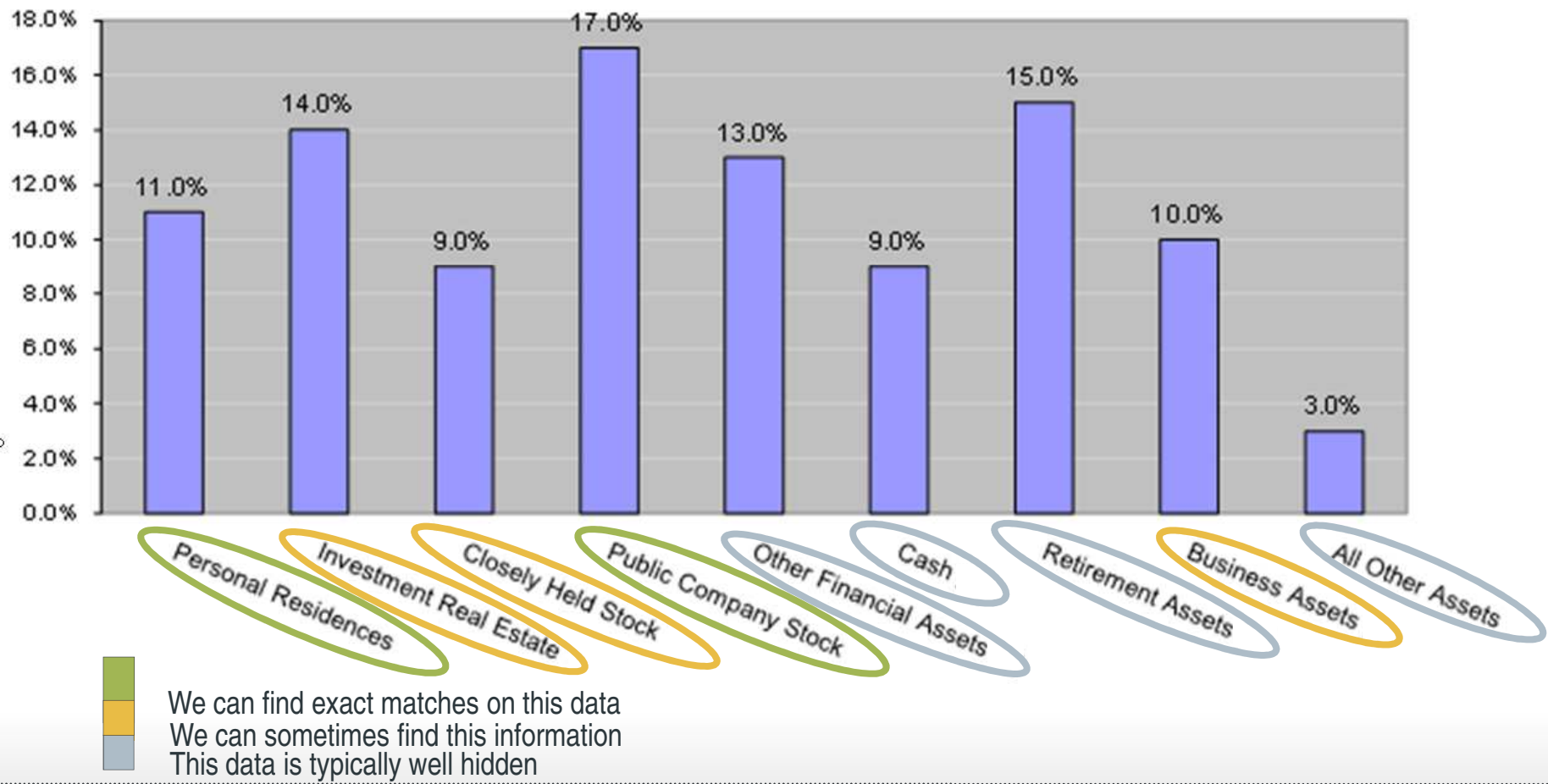
Be sure to refresh the capacity/holdings of the prospect if you confirmed any resources,

Consider the results of the modeling data before dismissing.

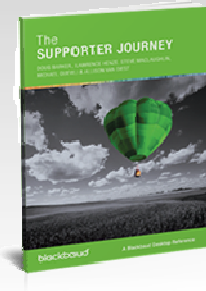
Remember the only thing we are looking at is publically held information with regards to traditional wealth screening.

➤ ASSET PORTFOLIOS OF THE WEALTHY

According to the IRS, households with net worth between \$1.5M-\$10M have their worth spread among these asset categories



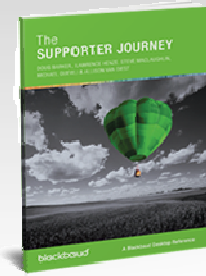
► Something To Think About



You can spend 90 minutes in the morning and have 5-6 prospects to call to set up meetings.

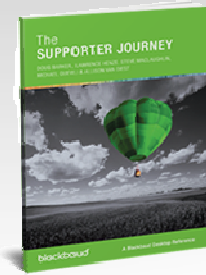
It is very possible that another non-profit is looking at your same prospect- so time is of the essence!

► Step 3 – Finalize the three-dimensional view



- If there were details on business assets you wanted to confirm make notes of that so don't forget to bring that up during the meeting.
- Document everything when you meet with the prospect and remember no information is too small. A middle initial can change the capacity of a prospect immensely.
- Be sure that all the information and what transpired is documented.
- Ask the question “What is the data telling me?” and “What is the data not telling me?”
- Begin the process of looking at the additional resources and soon you will have a full-profile! Remember a profile is never truly finished.

► Singular Focus

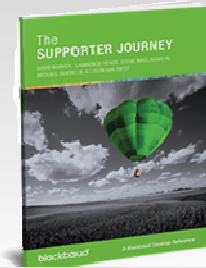


Jane Smith – ID# 43000673

Event Participant – Attending Reunion



► Understanding your Constituent



Jane Smith – ID# 43000673

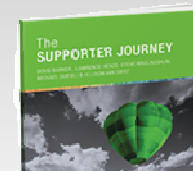
Event Participant – Attending Reunion

Alumna – Class of 1982

Lived in Wood Hall while at school



► Coming into Focus



Jane Smith – ID# 43000673

Event Participant – Attending Reunion

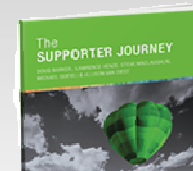
Alumna – Class of 1982

Lived in Wood Hall while in school

Contributed \$500 to Annual Fund



► Adding External Data



Jane Smith – ID# 43000673

Event Participant – Attending Reunion

Alumna – Class of 1982

Lived in Wood Hall while in school

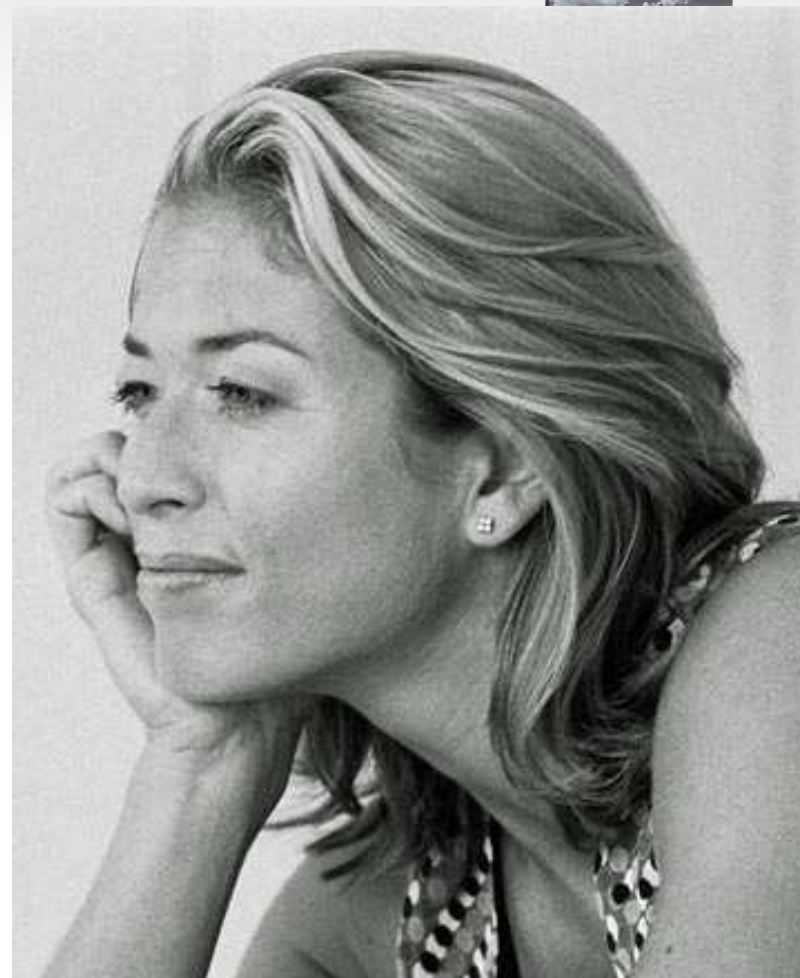
Contributed \$500 to Annual Fund

Married, 2 daughters

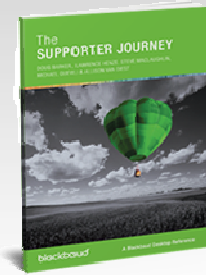
CEO of AB Electronics, \$55M Sales

2 Properties, \$5.2M

Sits on BOD of Smith Family Foundation

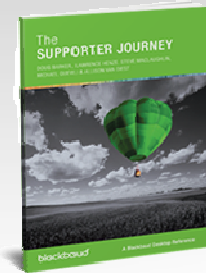


► Data → Information → Strategy



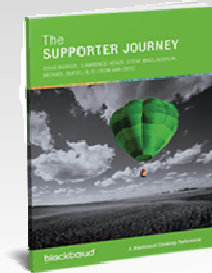
- Data is not information; Information is the integration of data
 1. *Facts become Data when they are organized*
 2. *Data, when analyzed, becomes information*
 3. *Information, when applied, becomes practice or tactics*
 4. *Tactics, when coordinated, become strategy*
- Key Concept: Transforming facts into strategy leads to better decision making
- *Adapted from: Daniel Weinreb's AFP NNE 2007 presentation*

► In Closing



Ask yourself what additional information can be obtained on your prospects? Remember if you are not tracking reunion then start now because in 5 years you can have some real good data!

Set aside time in your Outlook calendar to spend three hours a week qualifying prospects. This can identify 12 prospects a week. If you don't set aside time then you will never get to it. Start a new work pattern now!



THANK YOU!

— — —

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