

## Reactive to Proactive: The Qualification Process



Presented by  
Joanne Souaid  
Manager of Research & Pipeline,  
University of Ottawa  
SESSION DATE: October 13th, 2016  
SESSION TIME: 9am-10:15am



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### Outline

- Things to note
- In the beginning
- The Qualification Process
- Work flow (+ secret ingredient)
- Outcomes
- Final thoughts
- Q & A

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### In case you're wondering...

- Environment
- Research Team
- Number of Fundraisers
- Constituent Type
- Number of iterations

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### Once upon a time...

- Research Requests/month
- Fridays
- Sharing the load

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### Research Dept.'s Plan

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### The Results?

- Planning
- Connection with fundraisers
- Strategic information
- Research leads went unnoticed

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## Enter a *New Approach*

### Researchers...

- Assignments;
- Connections;
- *Strategic* meetings; and
- Research Leads

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## The Qualification Process

**Definition:** To identify, review, approve, and assign a *suspect* to a fundraiser who, in turn, arranges a meeting with the suspect in order to ascertain whether the suspect meets the required specifications necessary to be identified as a *prospect*.

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## Hierarchy

**Suspect:** an individual who is researched and found to have the potential to give a substantial donation;

**Prospect:** an individual who is qualified as having strong affinity and financial capacity to give a substantial donation;

**Donor:** An individual who gives a donation

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### Qualification Process: The Work flow

- Identify & Research
- Review, Approve, & Assign
- Possible Outcomes

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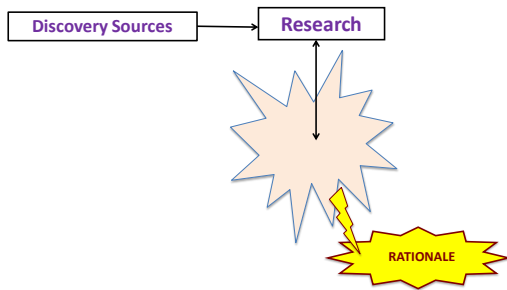
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### Qualification Process: Identify & Research



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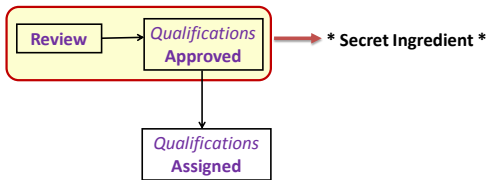
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### Qualification Process: Review, Approve & Assign



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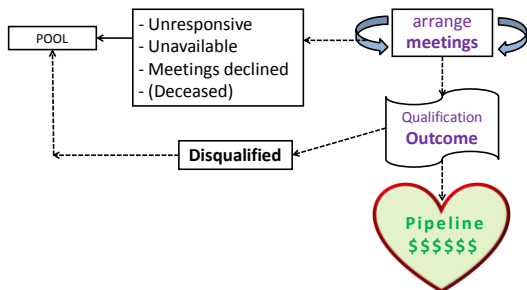
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### Qualification Process: Possible Outcomes



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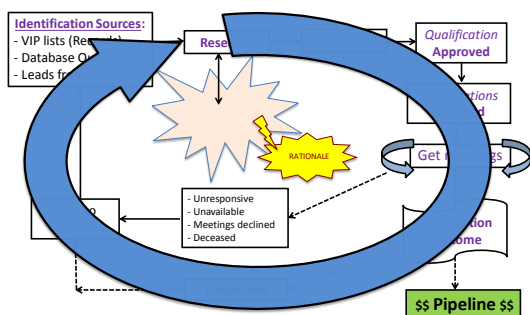
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### Qualification Process: Work Flow Recap



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### Overall Outcomes

- Conversion rate
- Expand the Pipeline
- Work together / synergy
- Feel like part of the team
- Research can plan (ahead)

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## Final Thoughts

- Criteria for identification
- Coding Qualification Assignments
- Push Push Push
- This process took a year...
- ...and is still evolving

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## Your Thoughts?

## Questions & Answers

For more information, please contact:  
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