Using Competitive Intelligence for Prospect Research Leadership

APRA CANADA 2016

October 12-14
Toronto

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SESSION DATE: Thursday October 13, 2016

SESSION TIME: 1:30 – 2:45 pm

Agenda

1. What is CI?
2. What is Leadership?
3. How does this impact Prospect Research?
4. Harness the power of all three?

Words of Wisdom

The best solicitation occurs when the *right* prospect is asked for the *right* gift by the *right* solicitor at the *right* time in the *right* way.

One of the most important elements in the fund-raising process is determining all of these *rights* .

For that to occur, research is essential.

- Alfred A. Blum,
Director of Institutional Advancement,
Boston College Law School

Two Peas in a Pod

Prospect Research and Competitive Intelligence

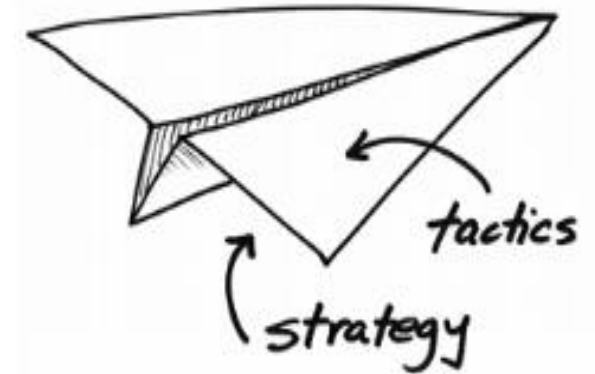| Prospect Research	Competitive Intelligence
Planning	Planning
Research	Research
Synthesis	Analysis
Act/Ask	Report

The Intelligence Cycle

Source: Fuld.com

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Competitive Intelligence is:

- a process to aid in alerting management to an early warning
- analyzed information for decision making or action taken
- a way for firms to improve their bottom line
- usually an executive suite/partner directive
- short term and long term - operational, tactical and strategic

Competitive Intelligence is NOT:

- Collecting and/or disseminating news
- Google or CRM searching
- Spying or espionage

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tactics

strategy

Prospect Research vs Competitive Intelligence

Prospect Research	Competitive Intelligence

Event Specific

Timely

Long(er) Term

Goal Oriented

Anticipatory

Results Driven

Decision Making

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What is Leadership?

☆ leadership 🔊   ◀ ▶

Definitions (3)   See Examples   Save to Favorites   Add to Flashcards

1. The individuals who are the leaders in an organization, regarded collectively.
2.
The activity of leading a group of people or an organization or the ability to do this.

Leadership involves

1. establishing a clear vision,
2. sharing that vision with others so that they will follow willingly,
3. providing the information, knowledge and methods to realize that vision, and
4. coordinating and balancing the conflicting interests of all members and stakeholders.

A leader steps up in times of crisis, and is able to think and act creatively in difficult situations. Unlike management, leadership cannot be taught, although it may be learned and enhanced through coaching or mentoring. Someone with great leadership skills today is Bill Gates who, despite early failures, with continued passion and innovation has driven Microsoft and the software industry to success.
3. The act of inspiring subordinants to perform and engage in achieving a goal.

What does Leadership mean for Prospect Research?

Leadership has been described as "a process of social influence in which one person can enlist the aid and support of others in the accomplishment of a common task".
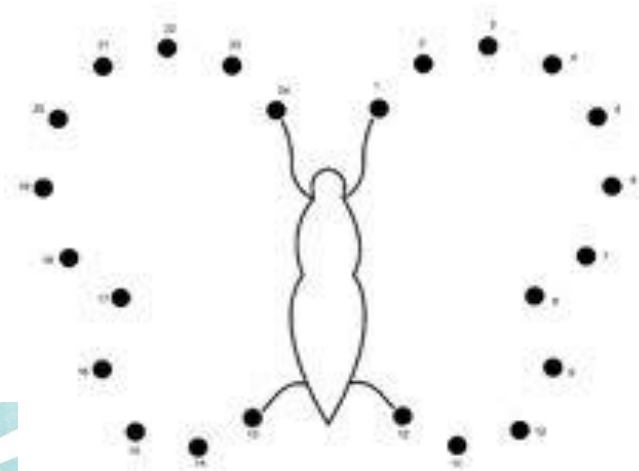
Collaboration – Leadership in Action

The way a team plays as a whole determines its success. You may have the greatest bunch of individual stars in the world, but if they don't play together, the club won't be worth a dime." - Babe Ruth

- Ability to get along and work together (with patrons and coworkers), will pass the time, make you more effective = increase enjoyment.

- Part of your research is understanding how you and those around you collaborate.

Collaborators come in all different shapes and sizes. We've identified the top nine types of collaborators that typically exist within an organization. Ranging from early adopters to social butterflies to the begrudging skeptics, we're sure you'll recognize more than a couple of the characters below.

The 9 Types of Collaborators

The Stealth Ninja

A covert collaborator, the Stealth Ninja is the one who lurks, quietly moving from workspace to workspace viewing other people's work that piques their interest. Stealth Ninjas are usually the first to view a file, even if they're not a part of the team. They usually abstain from commenting unless absolutely necessary with the only evidence of their presence an entry on the audit log.

The Ringleader

The Ringleader is anything but a behind-the-scenes person. The Ringleader is a big-idea person who helps other team members arrive at "aha" moments. Ringleaders begin a lot of discussions, bookmark interesting content and add thought-provoking comments to discussions and files. Their creative energy seeps into and influences team members across all the departments.

The Executive

The Executive is usually a decision-maker in your company or department who has limited time, yet wants or needs to be involved at a high level. Speed, efficiency and convenience are of utmost importance to The Executive, who prefers to communicate feedback and final decisions via email rather than logging into a system. When The Executive does log in, the purpose is usually to take in the status of various projects as opposed to actively engaging or working on a project at a detail level.

The Expert

The Expert is the go-to person for questions about collaboration technology and best practices in your organization. The Expert looks beyond the normal file-sharing and project management capabilities of a collaboration solution and finds interesting and innovative ways to automate his or her work by leveraging sophisticated workflows, databases and other advanced features. Borderline geek, Experts are always experimenting, sharing new hacks on the intranet, and custom coding to create the coolest-looking workspaces on the block. Oh, and they usually have the most interesting desk toys and gadgets.

The Socialite

This type of collaborator was born to be social. Socialites are storytellers and connectors. Sharing project details and updates comes as second nature to Socialites because they are more than used to sharing on a regular basis via Facebook, Twitter, Google+, MySpace, LinkedIn, Tumblr ... you get the point. The Socialite always has a newly updated status, helps carry on conversations and encourages others to engage. Socialites are great for easing those who are less accustomed to open communication into being more social.

The Siloist

The Siloist enjoys working alone and is reluctant to share only because he or she is not used to it. Siloists tend to be a bit absent from the workspaces they're part of and like to do most work offline. Siloists are actually most at risk of losing files and work because they prefer not to save and backup regularly to the cloud - and they are also always the last to realize, if ever at all, that the intranet is down.

The Skeptic

The Skeptic is a somewhat vocal opponent to collaboration. Skeptics can often be detractors because they decentralize knowledge and communication when refusing to the use the collaboration workspace. There is hope for Skeptics, though, as they can ultimately be won over if convinced that the WIIFM (What is in it for me?) quotient is high enough.

The Dinosaur

The Dinosaur is not the most tech-savvy person in the organization. A creature of habit and uncomfortable with new ways of doing things, The Dinosaur tends to stick to traditional methods of work. While The Expert might equate managing projects by email to banging two rocks together to create fire, The Dinosaur prefers to be cloaked in this sanctuary of status quo. The Dinosaur does not embrace a new tool without some encouragement, so it is extremely important that the collaboration solution be simple and intuitive.

The Taskmaster

Taskmasters may err on the OCD side or simply be organized to an extreme. No detail is too small, no action item goes unassigned and no audit log unread. The Taskmaster is operationally focused, using collaboration tools fully to execute on project plans. The Taskmaster is the one you can expect will follow up with a task list of action items five minutes after your call ends (and you're grateful for it!).

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Putting it Together

Donors, Prospects, External World

Internal Clients, Coworkers, Internal Data
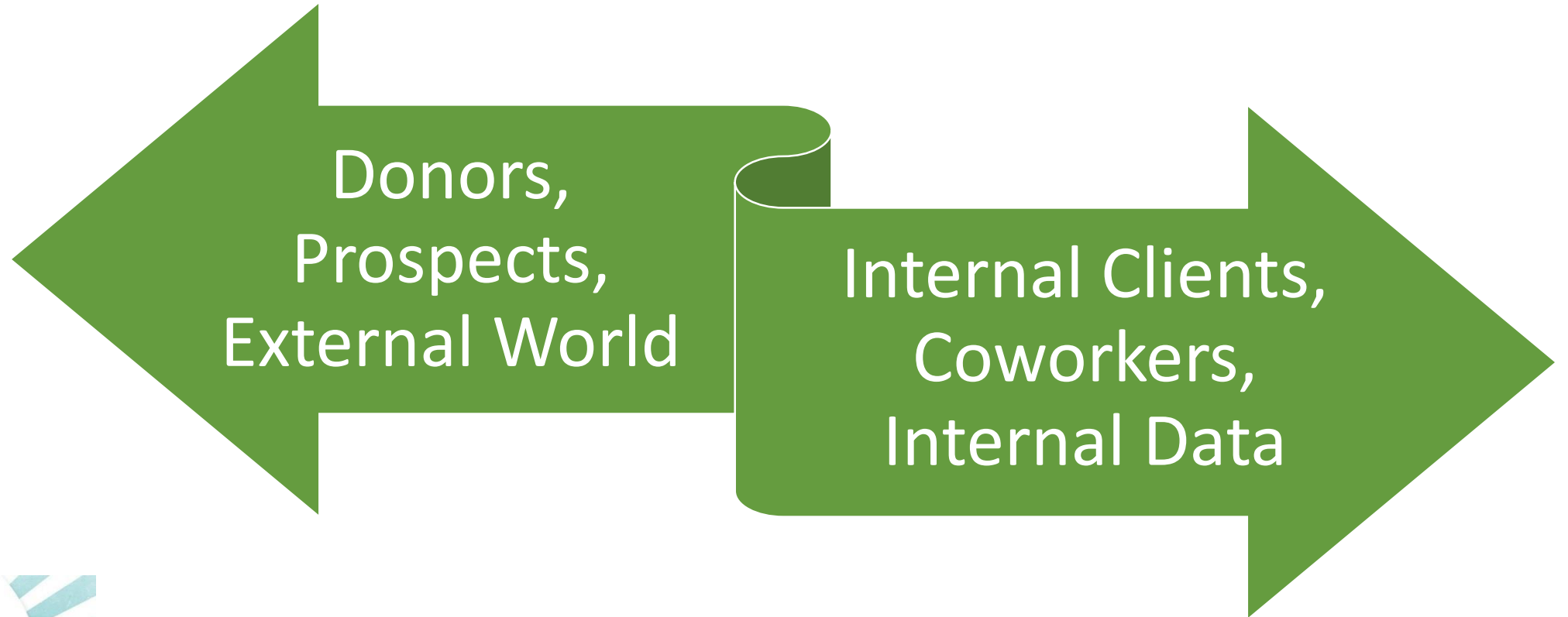
Inward Thinking

- Turn research & analysis efforts inward
- Knowing prospects, means understanding the organization
- As an advocate for the organization, make internal connections and share intel widely. HUMINT
- Engage the human element
- Collaborate for success

Thank You!

- How will you bring competitive intelligence, leadership/collaboration skills to bear tomorrow?
- Questions?
- Comments?