

EMPLOYING AN EXECUTIVE SEARCH RESEARCH MINDSET TO PROSPECT RESEARCH



CANADA CONFERENCE

OCTOBER 17-19, 2018

Sheila Rogers, Researcher

SESSION DATE: October 19, 2018

SESSION TIME: 9:15 a.m.

BACKGROUND

EXECUTIVE SEARCH RESEARCH

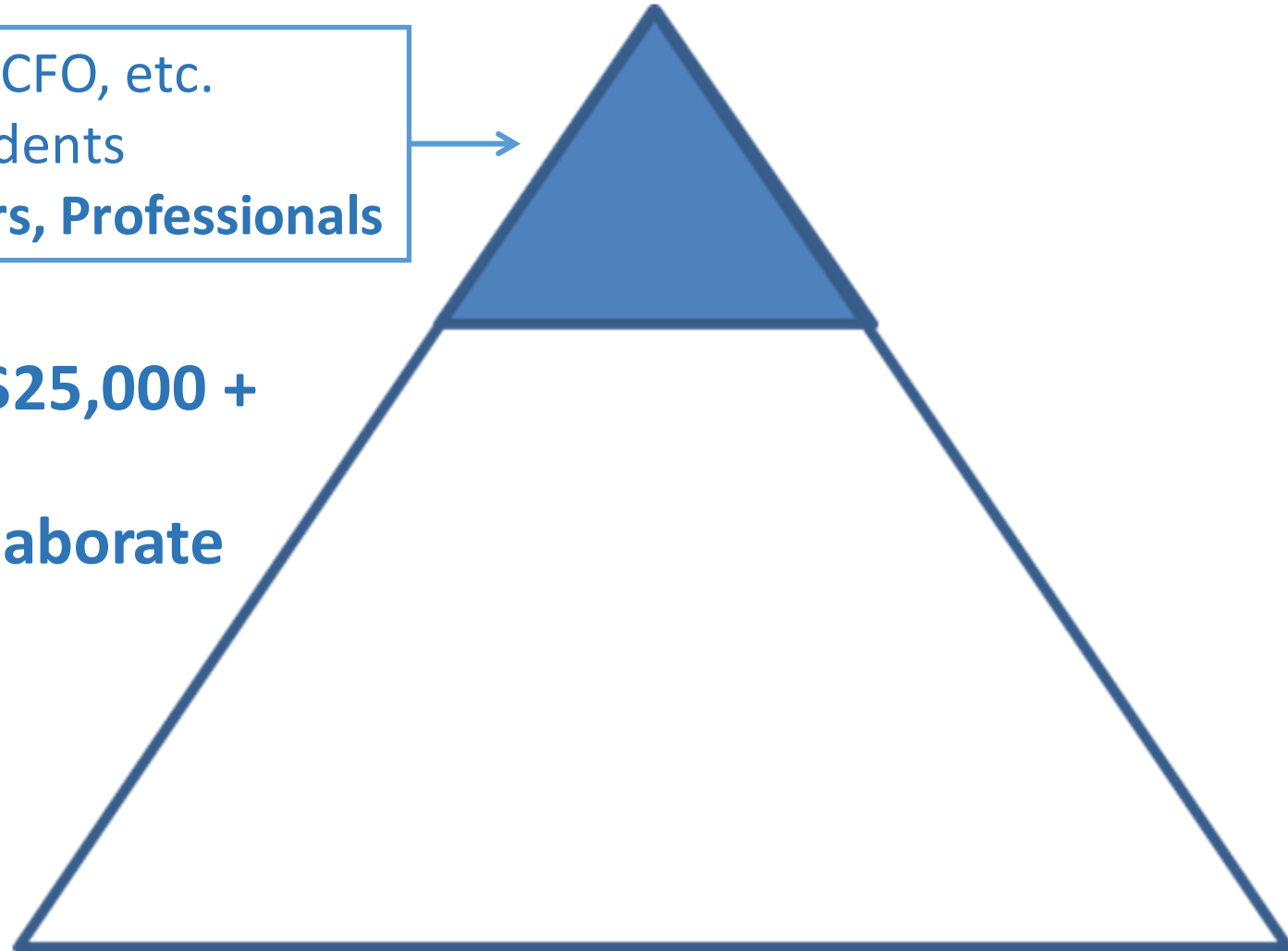
C-Suite: CEO, COO, CFO, etc.

V-Suite: Vice Presidents

Directors, Managers, Professionals

✓ **Client Fees: ~\$25,000 +**

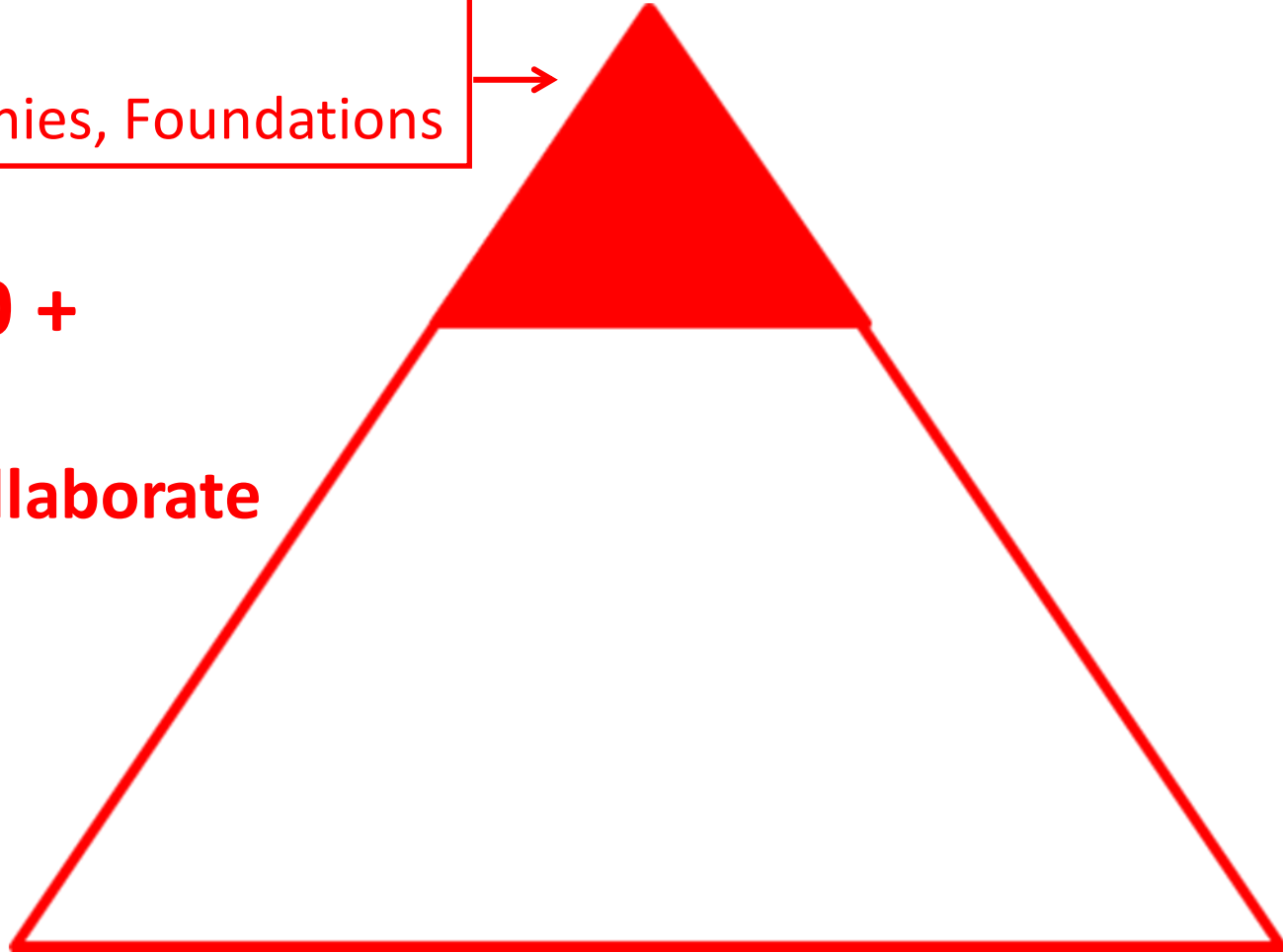
✓ **Support & Collaborate**



PROSPECT RESEARCH

Major Givers:
Individuals, Companies, Foundations

- ✓ **Gifts: \$25,000 +**
- ✓ **Support and Collaborate**



Executive Search Strategies → Prospect Research Success

EXECUTIVE SEARCH RESEARCH

- **NOT** sorting through publicly known experts
- ✓ **Hunting**
- ✓ **Networking**
- ✓ **Promoting**
- ✓ **Confidential Discussions**
- ✓ **Building a Pipeline**
- ✓ **Comfortable with Rejection**

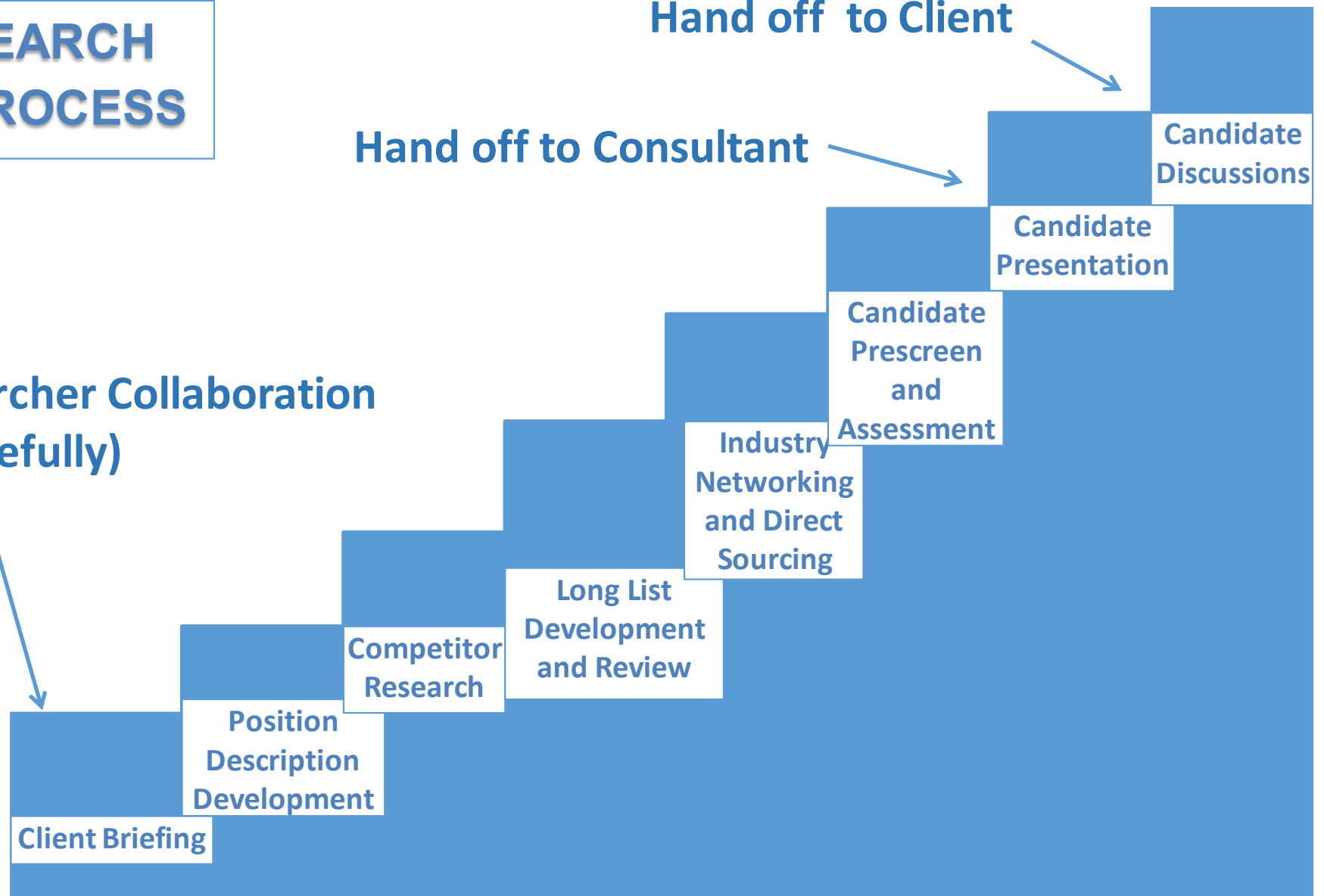


EXECUTIVE SEARCH RESEARCH PROCESS

Hand off to Client

Hand off to Consultant

Consultant/Researcher Collaboration
(Hopefully)



PROSPECT RESEARCH INVOLVEMENT IN THE FUNDRAISING CYCLE

Collaboration / Hand-off to Fundraiser

Stewardship

Solicitation

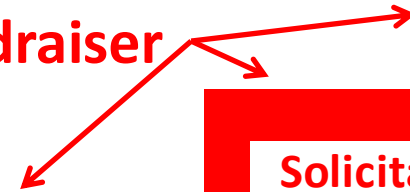
Cultivation

Qualifying

Identification

Fundraising Strategy /
Kick-off Meeting

Collaboration with Fundraiser
(Hopefully)



TARGETED STRATEGY: MAINTAINING A SENSE OF URGENCY





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TARGETED STRATEGY: MAXIMIZING REACH AND EFFICIENCY

EXECUTIVE SEARCH RESEARCH: PROSPECT CALL LIST

Priority	Name & Details	Bio	Source/Prospect Details
A, B, C	Name Title Company Location/Contacts	Education Career (Resume, if available)	Interests Connections (knows... referred by)



Industry Research: All companies, sources and potential prospects operating in your client's area of interest (200+)

All Prospects: Manager, Community Affairs in oil and gas, power or mining companies operating in Canada **(120)**

Qualified & Interested Prospects: Greenfield Experience & Open to Career Change **(10)**

Short list Candidates interviewed by the client **(4)**

Finalist Candidates (2)

Incumbent (1)





Major Gift Candidates (Capacity,
Propensity & Affinity)

Employment Network:

Key roles in oil and gas, power or mining companies
operating in Canada (**Capacity**)

Personal Network: (Potential Propensity & Affinity)

Expanded Network/Industry View: Additional prospects
(Capacity, Propensity & Potential Affinity)



BEST AND THE BRIGHTEST

EXECUTIVE SEARCH RESEARCH

- **NOT Glitz and Glamour**
 - ✓ **Set priorities**
 - ✓ **Understand personal motivators**
 - ✓ **Identify expectations**
 - ✓ **State the “One Powerful Message”**
 - ✓ **Proactively address issues**



PROSPECT RESEARCH

- **NOT just having an excellent cause**
 - ✓ **Find the emotional connection**
 - ✓ **Dig deep for personal motivators**
 - ✓ **Understand personality**
 - ✓ **Use social media to find clues; Get specific**
 - ✓ **Success is...saving time...maximizing the gift**

NETWORKS AND RELATIONSHIPS

CAREER HISTORY AS INDICATORS FOR PREDICTING GIVING

Social Media Clues

- ✓ **Motivating factors**
- ✓ **Fit: Personality, Analytical Skills, Intellect**
- ✓ **Red Flags**
- ✓ **Salary**
- ✓ **Giving Motivations**
- ✓ **Fit: Affinity and Interests**
- ✓ **Due Diligence**
- ✓ **Capacity**

PROSPECT RESEARCH: CAREER HISTORY CLUES SUMMARY

- ✓ **Capacity**
- ✓ **Commitment**
- ✓ **Common Points of Interest**

PROSPECT RESEARCH: INDUSTRY PROFILES

- ✓ Industry Trends
- ✓ Giving Patterns
- ✓ Corporate Citizenship
- ✓ The “Number #2” Company
- ✓ Links between Companies
- ✓ Employee Retention Strategies
- ✓ Key Executives and Board Members

ESSENTIAL SEARCH RESOURCES

- ✓ **Social Media**
 - **Prospects**
 - **Companies**
- ✓ **Capacity Assessment Tools**
- ✓ **Boolean Searches**
- ✓ **RSS Feeds**

Key Take-Aways from Executive Search To Prospect Research

- ✓ Sense of Urgency
- ✓ Prioritizing
- ✓ Business Reason
- ✓ Database/Information Tracking

FINAL THOUGHTS....

While using Executive Search Research Strategies to enhance the collection, prioritization, utilization of data to create opportunities within Prospect Research; remember your Purpose.

Good prospect research is purposeful as it provides a wealth of information to better connect with donors and increase the likelihood of donating and maximize the gift.



QUESTIONS?

THANK YOU!

Please complete your session evaluation.