

Université 
de Montréal
et du monde.



The Times They Are A-Changin'

Using Change Management to Implement a
Prospect Management System

Presented by Delphine Rocher, Senior Prospect Management Analyst
at the Université de Montréal

APRA Canada 2024 Conference

Meet your speaker

Delphine Rocher

- Senior Prospect Management Analyst
- Started as a Prospect Researcher
- Previously worked as a freelance researcher
- Nature lover, baker & reader



Université de Montréal

- **450 000** graduates
- **44 000+** students
- Leading **hub** of higher education in Quebec
- **6th** French-speaking university in the world
- **4th** in Canada by volume of research



The Alumni and Donor Community

- Headed by the Vice-Rectorate for Alumni Relations and Philanthropy, the RDD helms our **\$1 billion Brave the way** campaign.
- **Team of 120** : Philanthropy, Operations, Communications, Alumni Relations
- **35 fundraisers** (Principal Gifts, Major Gifts, Leadership Giving, International and Planned Giving)
- Using Raiser's Edge **NXT**



Going back in time...

... to 2022

- No Prospect Management System
- Growing team
- Bad data & CRM conversion
- Leadership buy-in



Why Prospect Management ?

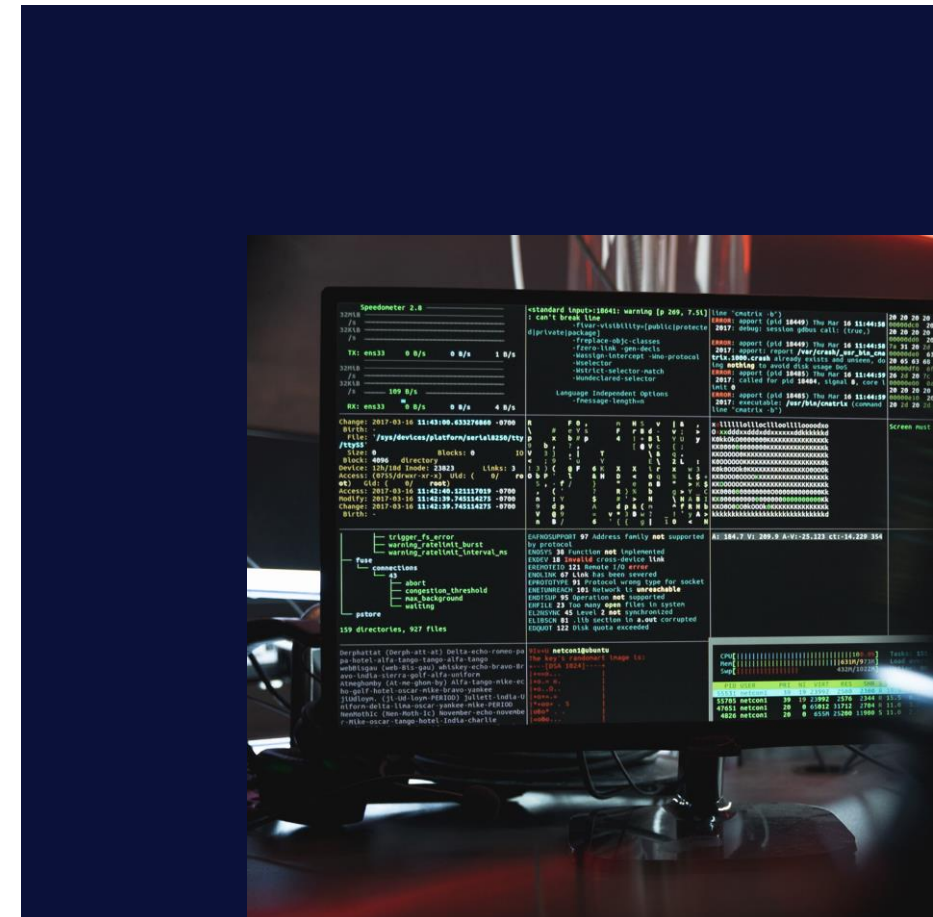
- **Optimize**, prioritize and strategize!
- **Streamlining** processes
- **Active**, engaged prospects
- **Expand** the prospect pool



Creating the PPM system...

... in two months!

- Prospect Management Policy in **September**
- First round of Portfolio Meetings in **November**
- Team of **one** for 20+ fundraisers



Implementing the PPM system

What worked well

- Successful first round
- Getting fundraisers **acquainted** with their portfolios

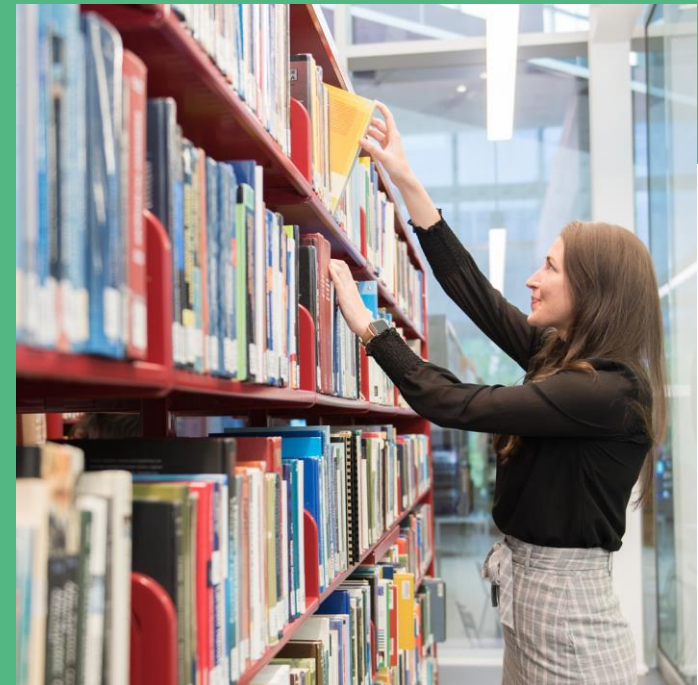
What didn't worked well

- No communicating/training
- Everything was too **fast!**



Utilizing Change Management

1. Planning
2. Communicating
3. Training
4. Monitoring
5. Rinse & repeat!



Change Management IRL

- Created a **Road Map** for Portfolio Meetings
- Made over our **training** cycle
- Spoke with the fundraisers as **often** as possible
- Frequent **touchpoints** with leadership



Lessons learned

- The importance of a **shared purpose**
- Focusing on creating a **dialogue**
- Building **strong** relationships
- Being **patient**
- Accepting **criticism**



The results

- 2 years of **successful** Prospect Management through personnel changes, a CRM conversion and as a team of one
- Positive **feedback!**
- **Reinventing** ourselves constantly



What's next ?

- A **growing** team...
- A brand new Prospect Management **Policy**
- Making over our Portfolio **Meetings**
- Portfolio **optimization**



Questions ?

Delphine Rocher

Senior Prospect Management Analyst

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