

An Insider's Guide to Prospect Research

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DVG Discovery.

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The logo for the National Capital Gift Planning Council (NCGPC) is a solid magenta square with the acronym "NCGPC" in white, uppercase, sans-serif font centered within it.

NCGPC

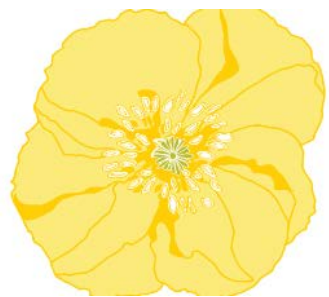


KOSET

getting to know me



Metro DC Chapter



THE ATLANTA
WOMEN'S
FOUNDATION

Breaking Cycles. Building Women.

BODY OF KNOWLEDGE

NCGPC

Who Are You?

- Industry
- Department size
- Research office?



Agenda and Learning Objectives

- Collaborating with Research
- On your own?
- Data points to look for
- Quick Research
- Deeper Dive Research

Partnering With Research

Tell me, I'll forget.
Show me, I'll remember.
Involve me, and I'll
understand.

- Chinese Proverb


Collaboration – It's Kind of a Big Deal

- Meet regularly for updates and strategy sessions
- Share leads for a deeper profile
- Can help you think of key points of data to listen and look for
- Check internal data
- Evaluate the prospects and prioritize outreach

Stop Being Lonely and Start Being Awesome

- Review your own lists – look for outliers
- Check your own data
- Run your own analytics
- Conduct brief prospect research prior to a meeting

Data Points

 # of years of giving (RFM)


Tier 1

- Total giving
- Age
- Rating
- Giving vehicle?
- Existing agreement?

 Active?

Tier 2

- Volunteer?
- Nature of relationship?
- Attended events?

 Married?

Tier 3

- Children?
- Retired?
- Female?
- Private foundation?

How Can This Help You? (Agenda Refresher)

- Research team or not, pulling data is easy and valuable for prospecting
- Research Team? Share information with them and they can help you prioritize
- No Research Team? Do simple scoring on your own to prioritize

Quick 8 Minute Research Check

- Step One: Check Your CRM System (1 minute)
- Step Two: Hit the Company Website/LinkedIn (2 minutes)
- Step Three: FEC.gov and News search (2 minutes)
- Step Four: Check Out Zillow (1 minute)
- Step Five: Quick SEC.gov check (2 minutes)

Deeper Dive *Both capacity and affinity*

- **A donor's giving ability can be understood through:**
 - Real estate – assessor databases, Lexis Nexis, Zillow
 - SEC filings and transactions – SEC.gov, SECForm4.com,
 - Business affiliations – Company website, business bio
 - Political giving – FEC.gov

- **A donor's affinity for giving can be understood through:**
 - Past gifts to your nonprofit – internal database and records
 - Past gifts to other nonprofits – annual reports, screening data, Lexis Nexis, Noza, IWave
 - Philanthropic involvement – targeted internet searches, boards, foundations

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