Building a strong prospect pipeline and creating great habits

November 25, 2019
WHERE DO PROSPECTS COME FROM?

Some things to consider…

- Existing Donors
- Existing ‘Lists’
- Referrals
- Research
QUALIFYING SUSPECTS

You’ve been handed a list – What’s next?

- Research
- Conversations (ASK ASK ASK)
- Own the responsibility/accountability

- BE CAREFUL…
- Avoid desktop fundraising and research paralysis
WHEN TO TAKE SOMEONE OFF YOUR LIST.

QUESTIONS TO CONSIDER…

- Can you contact them?
- Does anyone know them?
- Have they told you no? (LEGAL IMPLICATIONS)
- Have they responded to anything?
  - Timelines?
  - Tactics?
REMEMBER.....You can always pick them back up again on a list if appropriate

Wait…what happens if someone else ‘gets’ them?
MOVING DONORS

- Portfolio Size
- Moves Management
  - Predictability and planning
  - Where do your prospects mainly sit?

20/20/20/20/20
KEY HABITS

• “What am I going to do to raise money today?”
• Use technology
• Set aside time in your calendar daily
• Know your prospects well – talk to them.
• Prioritize Stewardship
  • Next best prospect is our last happy donor
KEY HABITS CONT’D…

• One thing at a time
• Make time for discovery calls
  • Must replenish the list!
ALWAYS REMEMBER…

Philanthropy is voluntary!
LET’S KEEP IN TOUCH…

Jennifer Williams
Director, Campaign and Development
Branksome Hall
16 Elm Avenue
Toronto, ON  M4W 1N3

Email: jwilliams@branksome.on.ca