EMPLOYING AN EXECUTIVE SEARCH RESEARCH MINDSET TO PROSPECT RESEARCH

SESSION DATE: October 19, 2018
SESSION TIME: 9:15 a.m.

Sheila Rogers, Researcher
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

Consultant/Researcher Collaboration (Hopefully)

Client Briefing

Position Description Development

Competitor Development and Review

Long List Development and Review

Industry Networking and Direct Sourcing

Candidate Prescreen and Assessment

Candidate Presentation

Candidate Discussions

Hand off to Consultant

Hand off to Client
PROSPECT RESEARCH INVOLVEMENT IN THE FUNDRAISING CYCLE

Collaboration with Fundraiser (Hopefully)

Fundraising Strategy / Kick-off Meeting

Identification

Qualifying

Cultivation

Solicitation

Stewardship

Collaboration / Hand-off to Fundraiser
TARGETED STRATEGY: MAINTAINING A SENSE OF URGENCY
TARGETED STRATEGY: MAXIMIZING REACH AND EFFICIENCY
## EXECUTIVE SEARCH RESEARCH: PROSPECT CALL LIST

<table>
<thead>
<tr>
<th>Priority</th>
<th>Name &amp; Details</th>
<th>Bio</th>
<th>Source/Prospect Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>A, B, C</td>
<td>Name</td>
<td>Education</td>
<td>Interests</td>
</tr>
<tr>
<td></td>
<td>Title</td>
<td>Career</td>
<td>Connections</td>
</tr>
<tr>
<td></td>
<td>Company</td>
<td>(Resume, if available)</td>
<td>(knows... referred by)</td>
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<tr>
<td></td>
<td>Location/Contacts</td>
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**CANADA CONFERENCE**
**OCTOBER 17-19, 2018**
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.