From Patient to Benefactor.

The Winning Combination of
Tools + Talent + Tactics

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Today's Speaker

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Today's Agenda

1. Your Goals

2. Tools – What do we need?

3. Talent – Who do we need?

4. Tactics – What do we do?

5. Winning Combinations for Major Giving, Prospect Development and Stewardship

Operating Assumptions

- **Commitment** – org-wide for long-term
- **Investment** – resources of time and talent
- **Data** – choices and extraction is complete
- **Teamwork** – Grateful Patient Program is NOT a solo activity
- **CRM** – Business rules allow for high-level prospects to be added; data entered – NO EXCELS!
- **Alignment** – supports your strategic plans and funding priorities
- **You're Unique** – Find what works for your team and constituents

What are your goals?

Focus.

What 1-2 goals are going to facilitate the maximum impact?

Major Giving and Stewardship will be our focus today!

Be Realistic.

What is meaningful progress to you?

Where are you starting?

Track Progress.

What to track?

Where to track?

Can I report on it?

PLEASE….

Do NOT create duplicative or unnecessary hard coded/static data.

Your Tools

**Definitions &
Documentation**

**Research
Database**

**Record
ID#s**

**Prospect Mgmt
& Dev Program**

**Training
Resources**

CRM

**Patient Data
Choices**

**Analytics &
Wealth Screening**

Reporting

Your Talent

Foundation Leadership

Hospital(s) Leadership (Pres, CMO, CNO, CAO, etc.)

Adv Services Operations

Research & Prospect Dev Officer

Development Officers

Physician Champions

EMR Operations Marketing & Comm

Your Tactics

Personal Note

Mail

Phone

Rounding

Tour or Program Visit

Impact Report

Video

Personal Meeting

Personal Leadership Meeting

Telefunding /Robocall

Testimonial

Survey

Data Flow
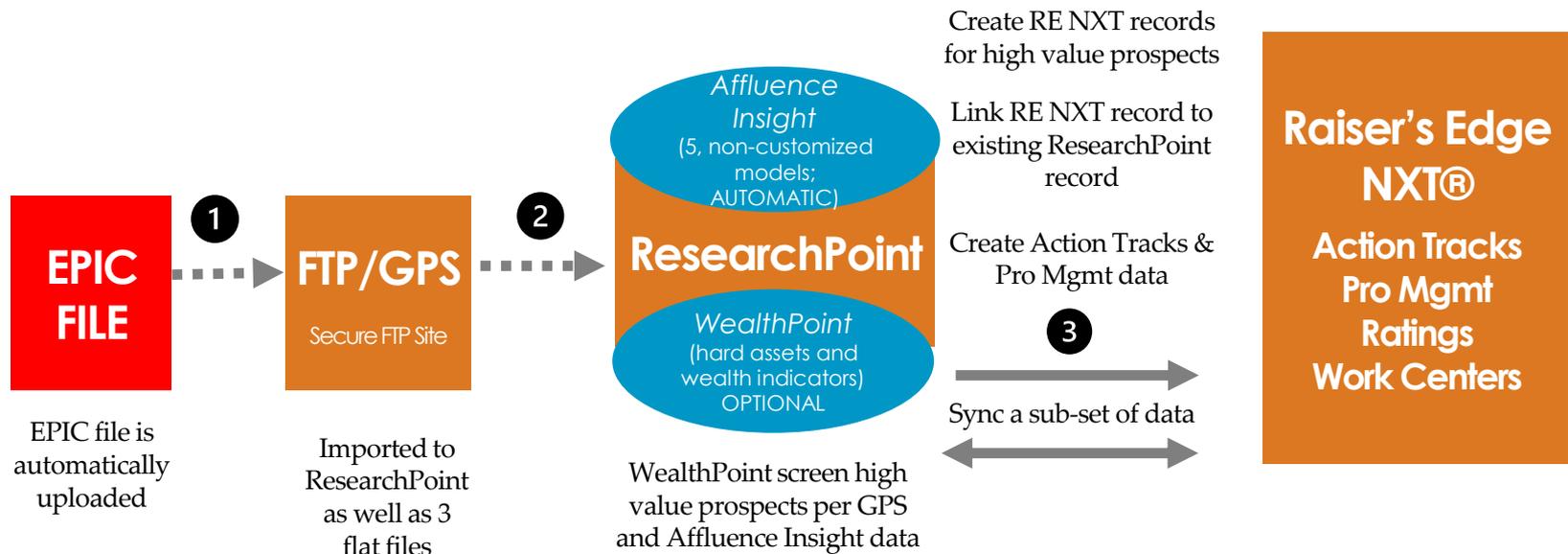
Data Funnel of Your Patient Universe
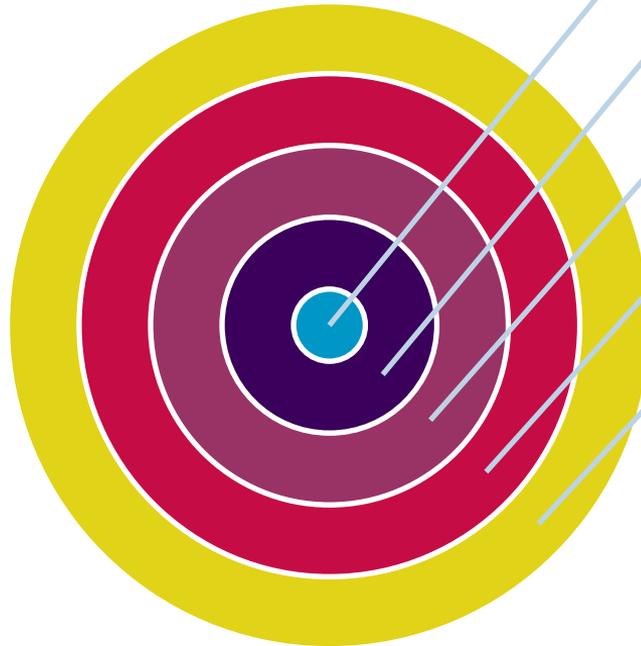
HIGH VALUE PROSPECTS

WealthPoint
(assets and wealth indicators)

Affluence Insight
(prescriptive, predictive models)

Your Donor & Prospect Data
Grateful Patient Solution *(pre-screening)*

What's Your 'High Value' Definition?

Start, Monitor, Refine Your Criteria

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'High Value' Definition
Example

Grateful Patient Solution

- WealthPoint Rating = A/B/C/D

Affluence Insight

(non-custom/prescriptive models)

- Donor Category = A1-Philanthropists or D-Affluent Enigmas
- Net Worth = $5M+
- Investments = $5M+

WealthPoint (assets and wealth indicators)

- Estimated Wealth = $5M+
- Confirmed Gift to Others = $25K+

ProspectPoint (custom, predictive models)

CURRENT CONSTITUENTS

- Target Gift Range 9+/$10,001+

'High Value' Definition
Example

ResearchPoint: Research Lists

Research Point: Shortcuts

Daily
(or Weekly)
Routine:
VIP Stew or Major Prospecting

Refresh and review research lists (link and batch exceptions, if necessary)

Prelim research, including WealthPoint screen and sync (5-10 min per) Add prospects to CRM*

VIP & MAJOR PROSPECT ACTION TRACKS in CRM flowing to Work Center

Tactic(s) completed and tracked in CRM

Prospect Mgmt updated in CRM
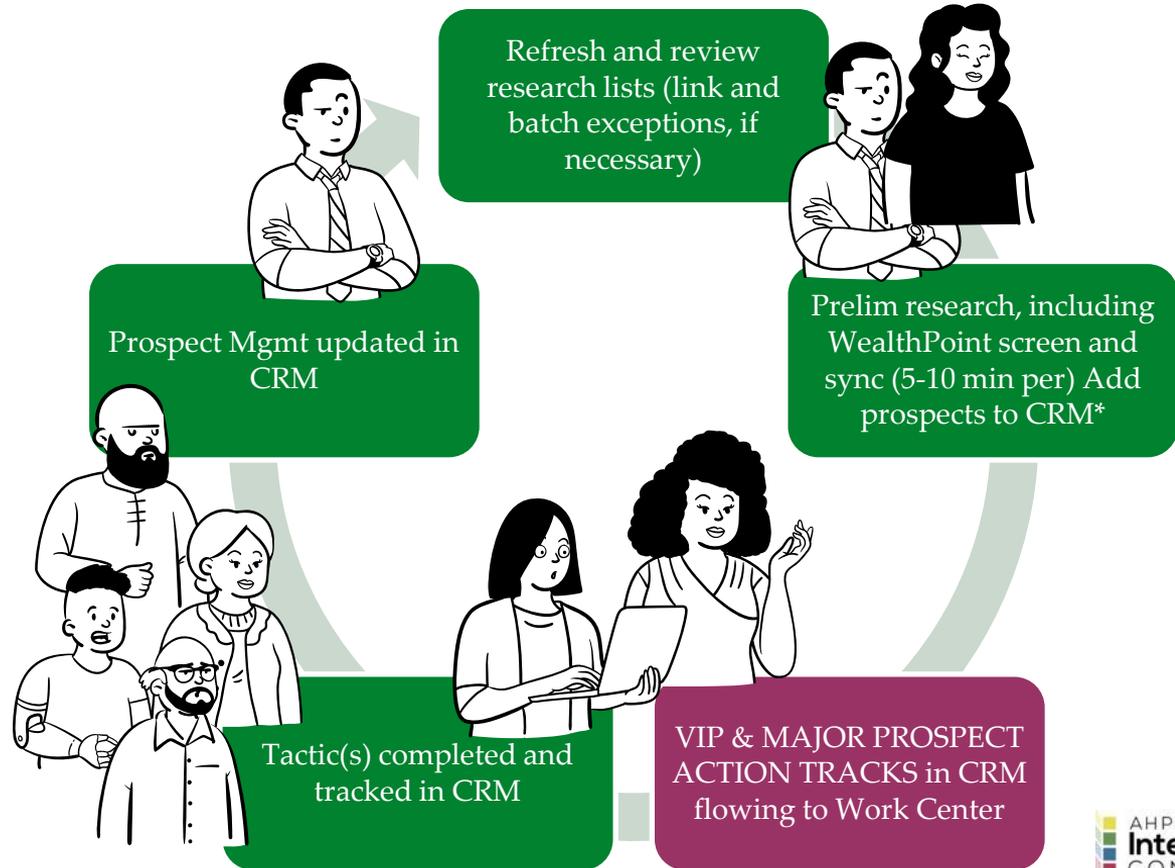
Monthly Routine:
Major Prospecting

Update ResearchPoint with CRM 'last month' data; Update Donor Matching File

Refresh and review 'Last Month' research lists

Communicate with Physician Champions & EMR Contact

Preliminary research (if not previously done)

PRO MGMT ACTION TRACKS in CRM flowing to Work Center

Prospect Mgmt Meeting discussions and next steps added to CRM (assignment and/or actions)
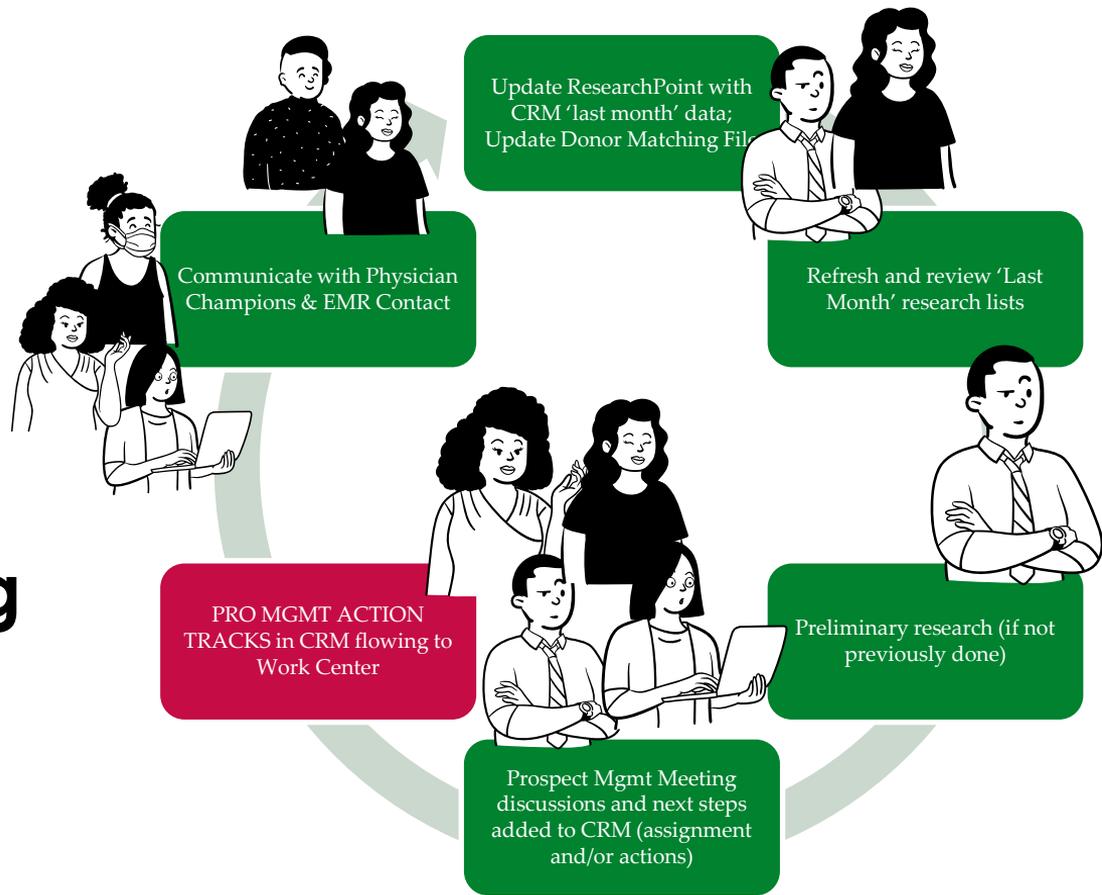
Action Tracks.

|	Actions: 1-7 Days	Actions: 30-60 Days	Actions: 60-90 Days
VIP & Major Stewardship – Health Event	Rounding (Daily)	Personal Phone Call Personal Meeting	Personal Ldrship Meeting
Major Prospecting – Health Event	*Discovery Research* Rounding (Daily) Intro Letter (Weekly; post discharge)	*Survey & Impact Report* Personal Call	*Visit Research* Personal Meeting & Tour

Remember…

Be Patient.

Keep Focus.

Work Together.

Follow the Data.

Aim for Consistency.

Be Authentic.
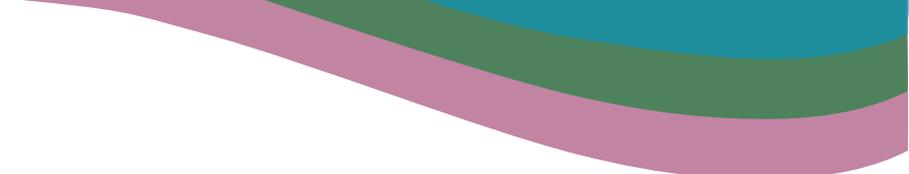
Thank you

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