



From Patient to Benefactor.

The Winning Combination of
Tools + Talent + Tactics



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**

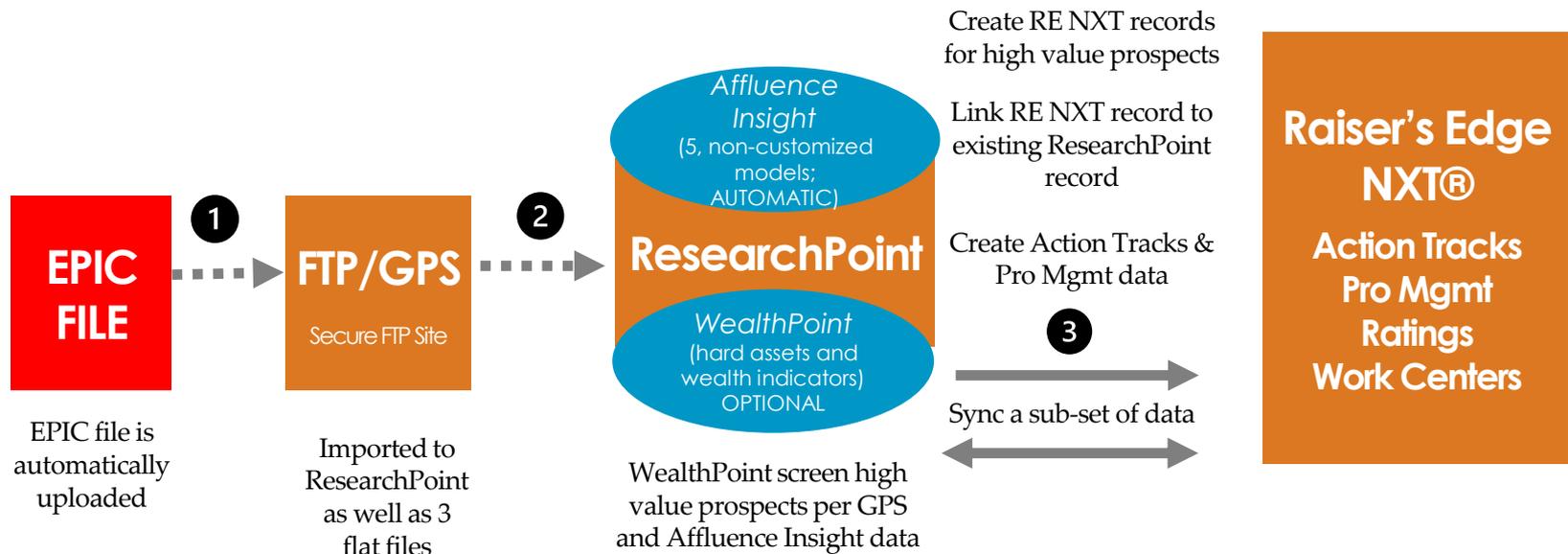


Testimonial



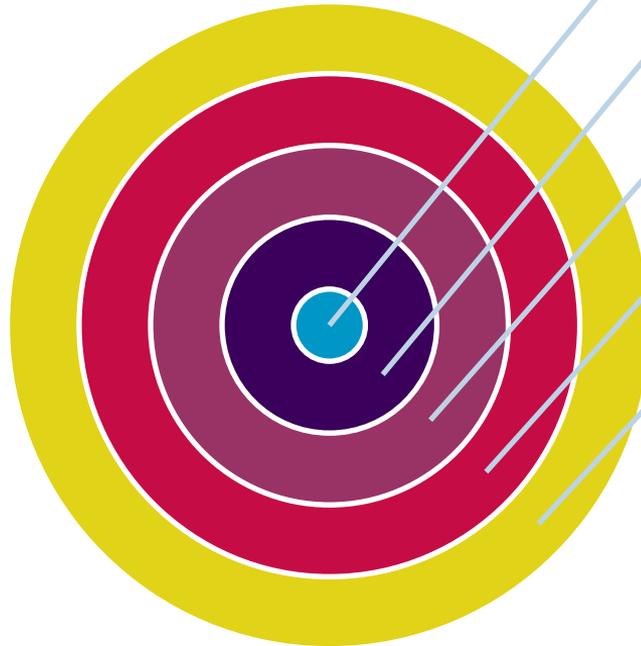
Survey

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





'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

Edit Ad-Hoc Query - TODAY | ALL Patients with High Indicators or Donor

Select filter and output fields

Set sort and group options

Preview results

Set save options

Find field:

Browse for fields in:

- Start
- Wealth Capacity
- Wealth Informal
 - Biographical
 - Biographical
 - Businesses
 - Foundation /
 - Income/Com
 - Nonprofit Af
 - Other Assets
 - Philanthropic
 - Political Don

Select Philanthropic Gifts fields:

Fields

- Category
- Confirmed
- Date confirmed
- Date rejected
- EIN
- End year
- Gift type
- Gift year

and or (+) (-) (+) (-)

Include records where:

- Date Screened Attribute\Value is today
- and (Model Scores and Ratings\WealthPoint Rating Attribute\Value is one of A, B, C, D
- or Wealth Information\Total assets - confirmed is greater than or equal to 5000000
- or Model Scores and Ratings\Target gift range score is greater than or equal to 9
- or Model Scores and Ratings\Target Analytics Investments Attribute\Value is greater than or equal to 5000000
- or Model Scores and Ratings\Target Analytics Wealth Segmentation Attribute\Value is one of A1 - High Net Worth Philanthro...
- or Model Scores and Ratings\Donor Attribute\Value is equal to Yes
- or (Wealth Information\Philanthropic Gifts\Confirmed is equal to Yes
- and Wealth Information\Philanthropic Gifts\Low amount is greater than or equal to 25000))

ResearchPoint: Research Lists

Home **Prospects** Analysis Administration Workflow

Research Lists

Research list folders Manage fol

Expand all Collapse all

Favorites (0)

- All research lists**
- <none>
- ProspectPoint (custom models)
- Grateful Patient Solution (8)
- Affluence Insight (non-custom models)
- WealthPoint (assets and wealth indicat)
- Data Mgmt

Research Lists (8) Add

Only show favorites Only show my lists Only show accessed lists | Apply Reset

Search Columns Clear all filters

<input type="checkbox"/>	Name ▲	Description
<input type="checkbox"/>	ALL DATES ALL Patients	ALL DATES ALL Patients
<input type="checkbox"/>	ALL DATES ALL Patients (Non-Donors) with Med-High Indicat...	ALL DATES ALL Patients (Non-Donors) with Med-High In...
<input type="checkbox"/>	ALL DATES ALL Patients with High Indicators	Further segment by filtering and WealthPoint screening
<input type="checkbox"/>	Data Mgmt Donor? Yes and RE Linked? No	Given that the Donor Matching File had a match (derived ..
<input type="checkbox"/>	LAST MONTH ALL Patients with Higher Indicators or Donor	LAST MONTH ALL Patients with Higher Indicators or Don.
<input type="checkbox"/>	LAST MONTH Patients who are Donors	Date [GPS] Screened = Last Month and Donor? = Yes. Use..
<input type="checkbox"/>	TODAY ALL Patients	TODAY ALL Patients
<input type="checkbox"/>	TODAY ALL Patients with High Indicators or Donor	TODAY ALL Patients with High Indicators or Donor

Research Point: Shortcuts

ResearchPoint™

Home | Prospects ▾ | Analysis ▾ | Administration ▾ | Workflow ▾

Configuration ⌵

- Edit BBDS URL
- Subscription status
- The Raiser's Edge integration

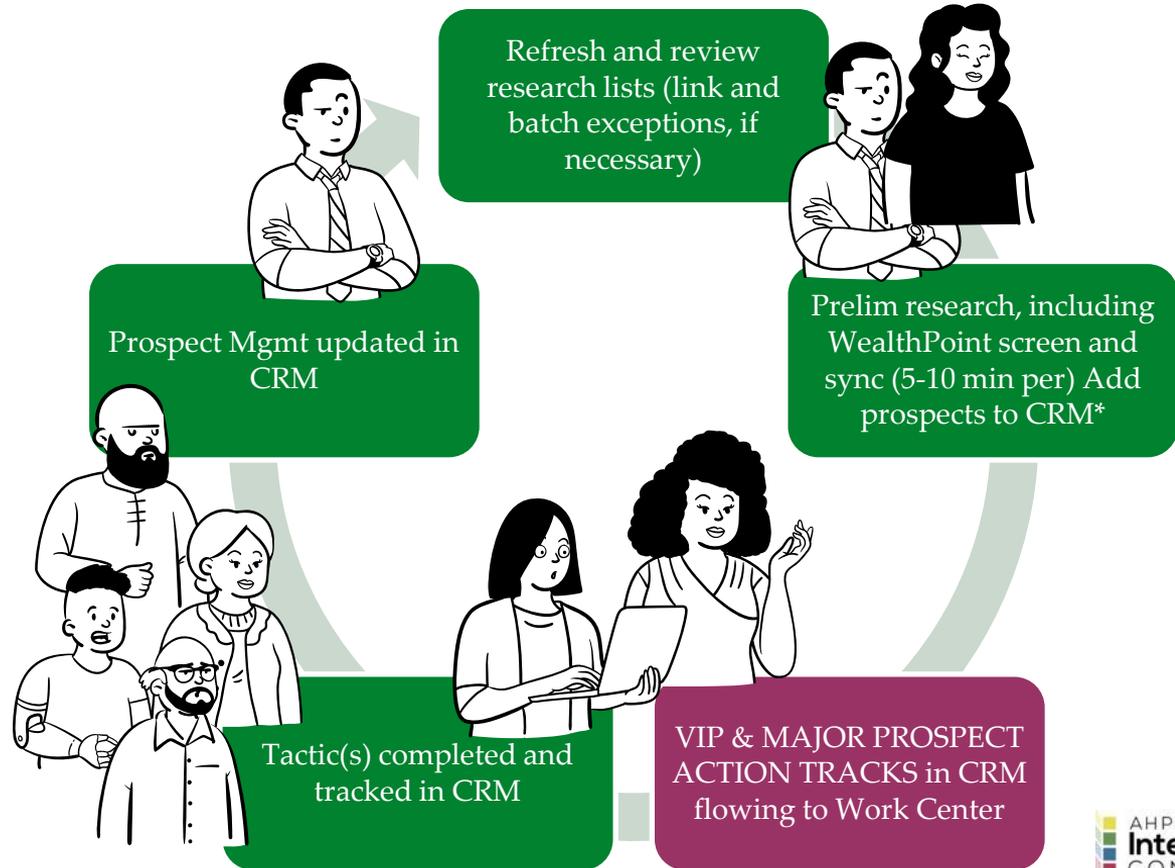
Shortcuts ⌵

- Add this page to shortcuts
- Manage my shortcuts
- STEP 1: Data Mgmt | Donor? Yes and RE Linked? No - Research List
- STEP 2: Batch Entry
- STEP 3: TODAY | ALL Patients with High Indicators or Donor (Sync, Screen, Review, Sync)

Search

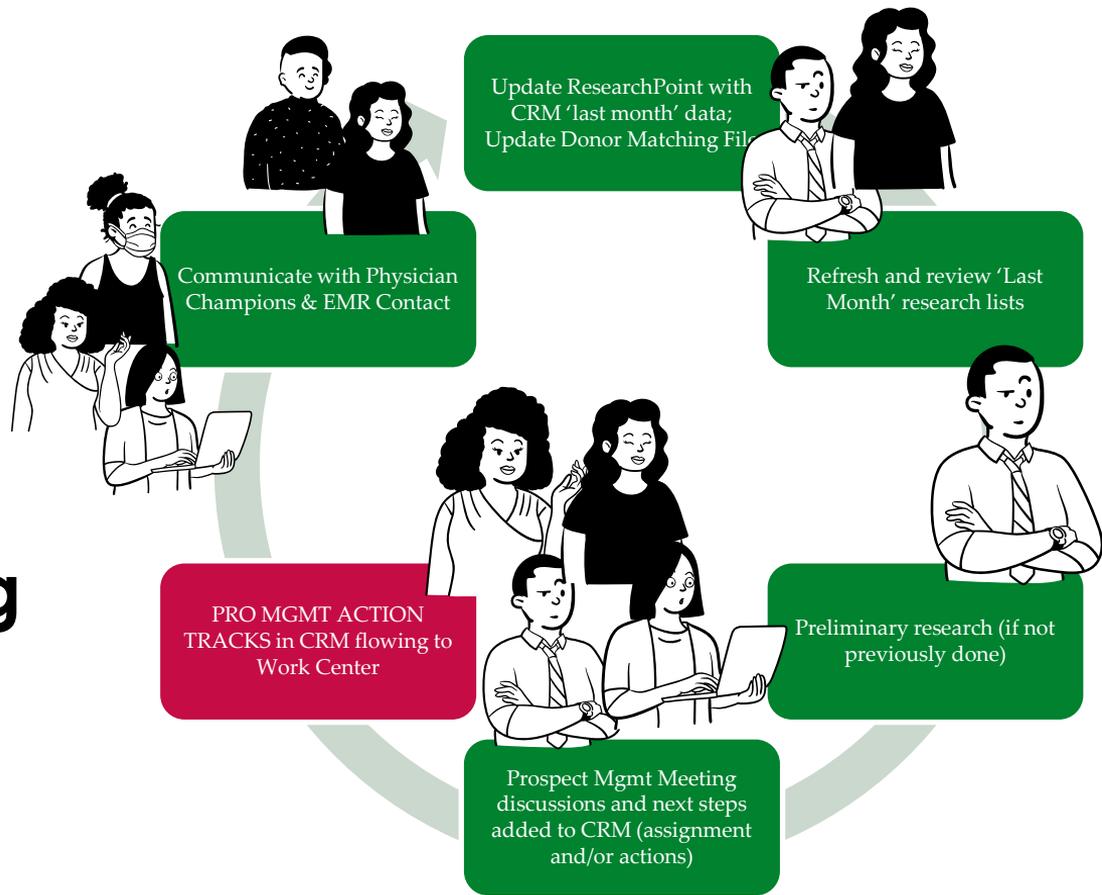
Search saved prospects ▾ ⓘ Name or ID...

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





Monthly Routine: Major Prospecting





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	<i>Discovery Research</i> Rounding (Daily) Intro Letter (Weekly; post discharge)	<i>Survey & Impact Report</i> Personal Call	<i>Visit Research</i> Personal Meeting & Tour



Remember...

Be Patient.

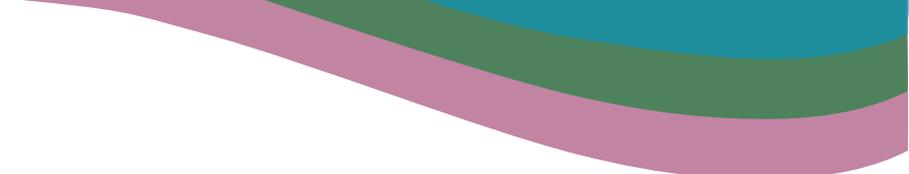
Keep Focus.

Work Together.

Follow the Data.

Aim for Consistency.

Be Authentic.



Thank you

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