

Esteemed Members Only: Identifying Your Tier II Prospects



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Where We're Headed

- Who is a “Tier II Prospect”
- Identifying your Tier II Prospects
- How many prospects should you have
- Let's talk



Who Is A “Tier II Prospect”

They're

- 55-60+
- Committed, loyal, current donors, regardless of gift size

They are excellent prospects for your PG program

They're

- NOT necessarily wealthy
- NOT necessarily board members
- NOT necessarily major donors



Identifying Your Tier II Prospects

- Start with your Top Prospect identifications, too many?
- If not, don't fret



Identifying Your Tier II Prospects

- Let's go to your CRM database
- Sample queries
 - “25+ gifts 2012-2021, non-lapsed”
 - Too many: “30+ gifts” or “35+ gifts”
 - Too few: “20+ gifts” or “15+ gifts”
 - Or adjust years
 - Too many: more recent; fewer than 10 years
 - Too few: earlier; more than 10 years
- Your 2 variables are # of gifts & # of years



How Many Prospects Should You Have

- As many as you can handle
- Depends how you will market to them
 - email
 - direct mail
 - be with us next week



Esteemed Members

Q&A