

Esteemed Members Only: Top Prospect Identification



PLANNED
GIVING
ACCELERATOR
TM

TOP SECRET

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Where We're Headed

- Defining “Top Prospect”
- Identifying your Top Prospects
- Defining your “Early Successes”
- Let's talk



Defining “Top Prospect”

They’re

- 55-60+
- Committed, loyal, current donors, regardless of gift size
- Approachable
- Close to your org
- Close to someone in your org, maybe you
- The names you hear often; talk to your colleagues
- The folks you’d be comfortable talking to

They are the low-hanging fruit for your PG program

They’re

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

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Who's Top of Mind?

- Who's top of mind right now?
- Start writing

- No one came to mind, that's OK
- We'll go to your CRM

UNCLASSIFIED

No One Came To Mind? Don't Fret

- We'll go to your CRM fundraising 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
 - Too few: earlier
- Adjust your 2 variables: # of gifts & # of years

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Defining Your “Early Successes”

- Identified manageable # of Top Prospects
- Solicitations, you opened the convos
- Gift commitments, of course
- Follow-up plans, critical
- No languishing asks, ever



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Q&A