A Researcher's Diary

THE RELATIONSHIP REPORT

Purpose

The intent of this report is to create a guide and template that extracts essential information needed from engagement into, and for, further cultivation. This report is a simple way of qualifying a prospect and learning what is necessary to move forward - whether that is to continue or conclude the relationship based on findings.

Readouts, call reports, and notes from prospect/donor meetings that go into nonprofit CRMs can and should be better, more robust when reviewed. By filling out the sections below, ideas and takeaways are organized, and additional users such as prospect researchers and other fundraisers (or stakeholders involved in moving relationships along) can have the necessary details needed for their jobs.

Philanthropic interests: This is when you learn if there is philanthropic alignment or an affinity to support your organization. The following questions will support you through this section: What organizations are they supporting? What is their understanding of philanthropy? What does the act of giving and philanthropy mean to them? How often do they give in a year?

Fun facts: This is a wonderful chance to learn about their immediate family, family history, or pinpoint wealth indicators such as their elegant home(s), their hobbies (perhaps flipping houses or dressage), certain expenses casually mentioned (such as how much the nanny earns or the private schools their children attend).

Additional comments: During prospect meetings, many things are said. Many details are missed, such as, casual comments that may indicate how and where their money is being spent. The prospect may describe their concerns about social issues or how they feel about an organization or maybe name drop some people they know that could be potential connectors/donors. Its important to have somewhere to store this information.

Takeaways: This is a great opportunity for you to write out how you felt about the meeting. However, this must be concise within 1-2 sentences, it cannot be disparaging, it must be constructive to philanthropic endeavors. For example, I believe I have a solid understanding of Mr. X's interests, and I think he truly understands the mission of the organization. Another example, after my meeting with Mr. X, I'm still unsure as to whether or not Mr. X is interested in giving to us. He was indifferent and had criticisms, and I answered his many questions regarding programming.

Next steps: Keeping your mind reflective and progressing is the intent of this space. This is an opportunity to keep yourself accountable and create a plan to move forward. Do you need to connect the prospect to a key stakeholder or representative? What material(s) do you need to send the prospect as a follow-up? When should you follow-up?

Name:
Philanthropic interests:
Fun facts:
Additional comments:
My takeaways:
Next steps:

Example:

Assigned To
C.C. Babcock

Related To
Margaret Sheffield

Type
Meeting

Subject
Qualification

Activity Date
8/29/2021

Description
C.C. met with Margaret Sheffield yesterday to learn of her interests, and what motivated her initial and unsolicited gift. Ms. Sheffield is currently supporting 5 orgs in the city that are focused on stem, education, and social service. She mentioned her past career in Tech; This is how she met her spouse Arielle Bloom, also in app and software development. They have 1 adult son and 3 dogs. Maggie said that Arielle knows a lot of people who host fundraisers and have great friends. They would love to throw an intimate party on our behalf, if interested.

Takeaways:
Maggie has a clear understanding of her philanthropic interests and wants to be more involved with the organization. She sees herself not just as a donor but also a connector.

Next Steps:
-Put together collateral and language that would be presented at the fundraising party
-Find out who would be potential guests
-Reach back out to Maggie by end of week to start planning party

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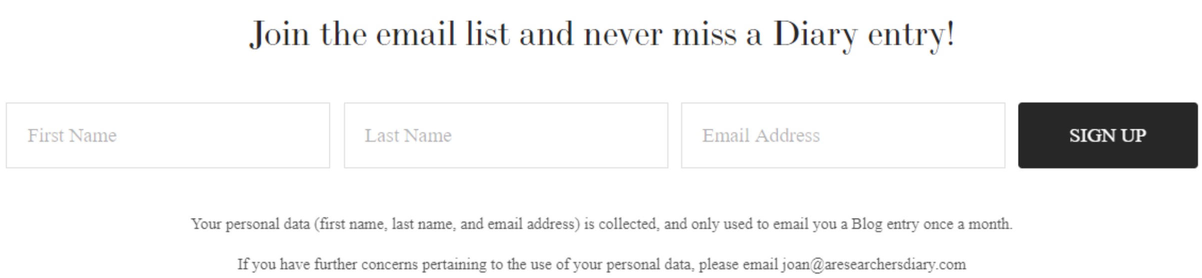

Check out the website and subscribe to the Diary, there is a new upload every month on the 15th.