

Creating A Data Driven Prospect Engagement Plan For Your Capital Campaign

The Killoe Group
March 23, 2021



Housekeeping

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This is being recorded. Our webinars are all recorded for future reference and placed into our Resources section of the Neon One website. It'll be there tomorrow!

2

We will be taking questions. We want this to be an actionable resource for your organization, so please use the Q&A!

3

We'll focus on practical experience, not high level data. Data is great, but more important is the user experience that data informs. See it in action.

4

We'll touch on product a bit but encourage you to use this as inspiration. The suggestions here relate to our experiences but your organization's moves management may differ. Test things out!

Victor Hugo (author)

As the purse is emptied, the heart is filled.

1. Learning Objectives
2. Using data to identify affinity
3. Creating a plan around an affinity quadrant chart
4. Using Neon CRM to track engagement and affinity
5. Grow Together - Question Time

Overview

Target Audience: Development professionals looking to maximize their major donor cultivation during a large fundraising project, such as a capital campaign.

What You Will Learn:

- How to think strategically about using data to find the balance between affluence and affinity
- How to create and implement a plan using an Affinity Chart
- Understanding what data points are important for affinity
- How Neon CRM can be used to manage an engagement strategy

What You Won't Learn:

- A deep dive into the wealth data itself - check out our recent Windfall webinar for that
- A deep tactical dive into affinity engagement and appeals. There are entire books written on this one, not enough time for today!

Michael J. Buckley, CFRE

The Killoe Group

- Proud career-long professional fundraiser
- Certified Fundraising Executive (CFRE)
- The Killoe Group is focused on helping organizations make small, successive decisions to build a culture of sustainability
- Accomplished amateur geneologist and lover of all things Irish



Poll Time

A Delicate Balance: The Art and Science of Data

We cannot stress that data around donor engagement is both an art and a science.

Data will not solve all your problems and it may uncover new ones.

The goal is to find the balance in data for your usage - for today's purposes, we will focus on affluence and affinity data through the lens of a capital campaign.

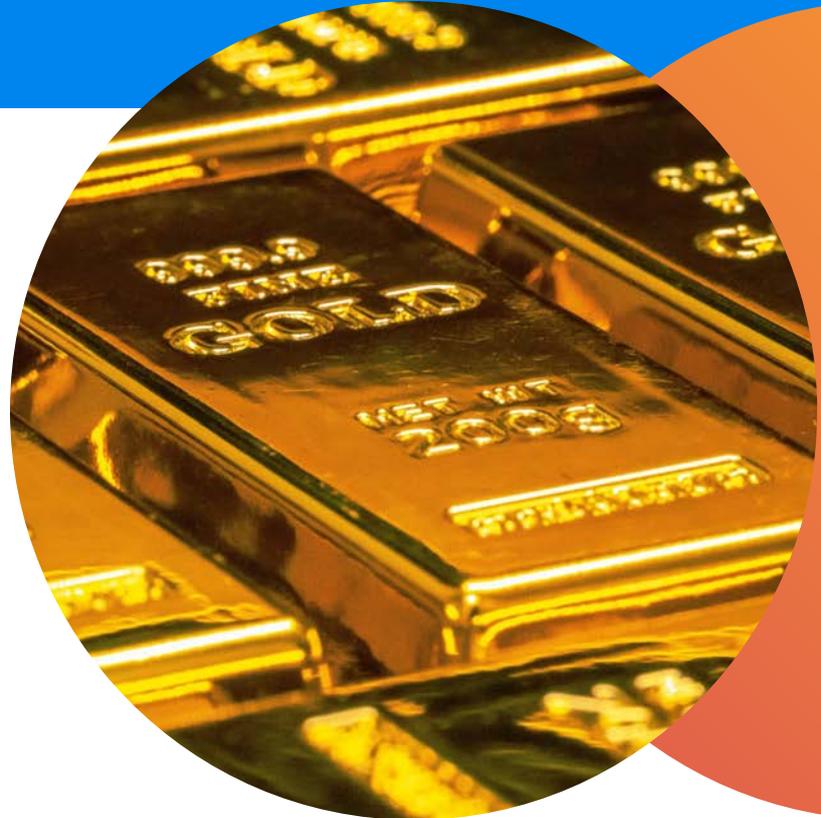


Using data to identify affluence

Using Data To Identify Affluence

Affluence Data Sources

- Wealths screening service
 - Pros and cons
 - Neon CRM options
- Public data
 - Geographic information
 - Publically available sales data
- Peer information
 - Don't discount conversations!



Using data to identify affinity

Using Data To Identify Affinity

Affinity Data Sources

- Engagement with gift officers
- Engagement at events
 - Email open rates
 - Monthly giving
 - Appeal responses
 - Stewardship reaction
- Engagement with staff / board



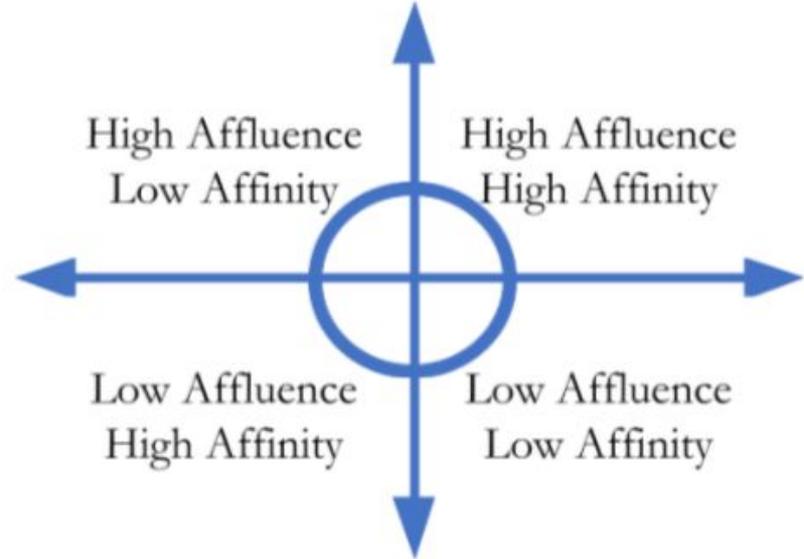
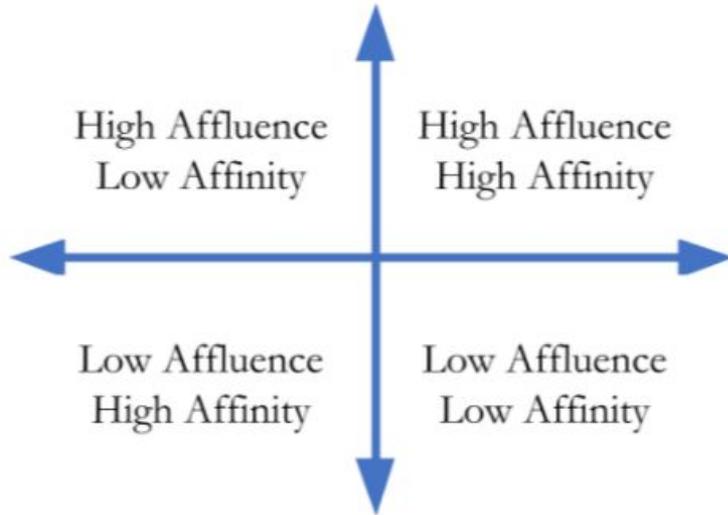
Charting Out Affinity

You can flag prioritization of individuals through creation of an affinity chart. With some planning and creativity, this can also be translated directly into your CRM.

Prospect Name	Donor 5+ Years	Event Attendance	Met E.D. or BoD	Opens e-newsletters	Recurring Gift program?	Has Toured Facility?
Margaret Dowling	1	1	1		1	
Edward Murphy	1			1		1

Creating a plan around an affinity
quadrant chart

Affinity + Affluence Balance



Where to begin?

Prioritization

- *Low affluence, high affinity* - missing anything?
- *Low affinity, high affluence* - one on one meetings to outline capital campaign vision to build affinity
- *High affinity, high affluence* - expedite prospect engagement plan
 - HIGHEST PRIORITY
- *Low affinity, low affluence* - don't discount these folks!



What's the plan?

Create affinity first

- Establish an engagement plan for donors who are “missing” affinity pieces
 - e.g. can you set up facility tours (virtually or in person) for people so they can get an idea for the vision of the campaign?
- Increase affinity while assessing affluence and capacity



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Closing Steps

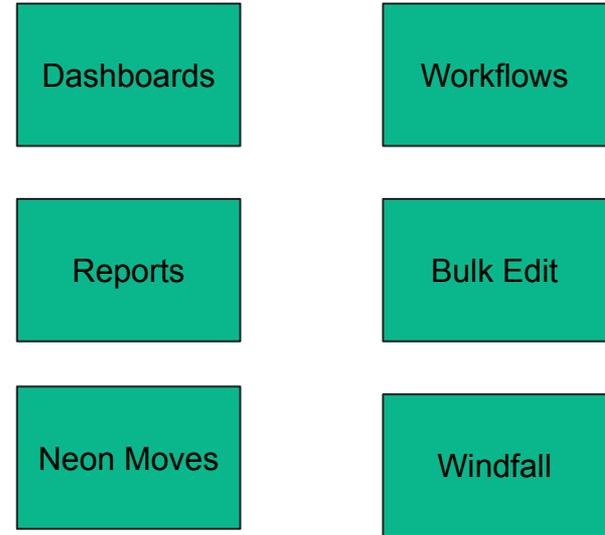
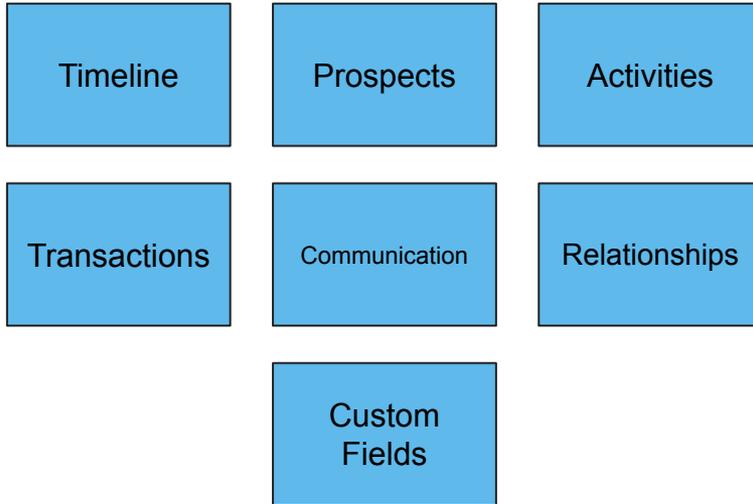
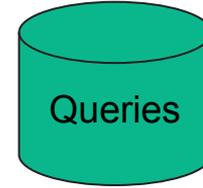
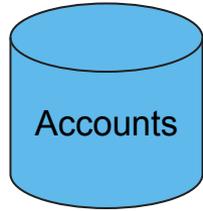
This will take time

- Affinity is a touch point that needs a time based outline (30 / 60 / 90 days)
- Make sure you write down your processes and then map that back to your technology (we'll do a bit of that today!)
- Engagement can be complex or not. Identify the 10 most important ways that donors show their passion for your mission and focus on those

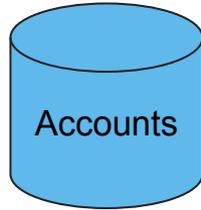


Neon CRM + Tracking Affinity

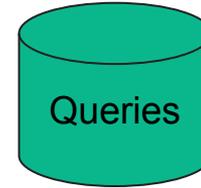
Neon CRM Data Structure - Affluence + Affinity



Neon CRM Feature Checklist - Affluence + Affinity

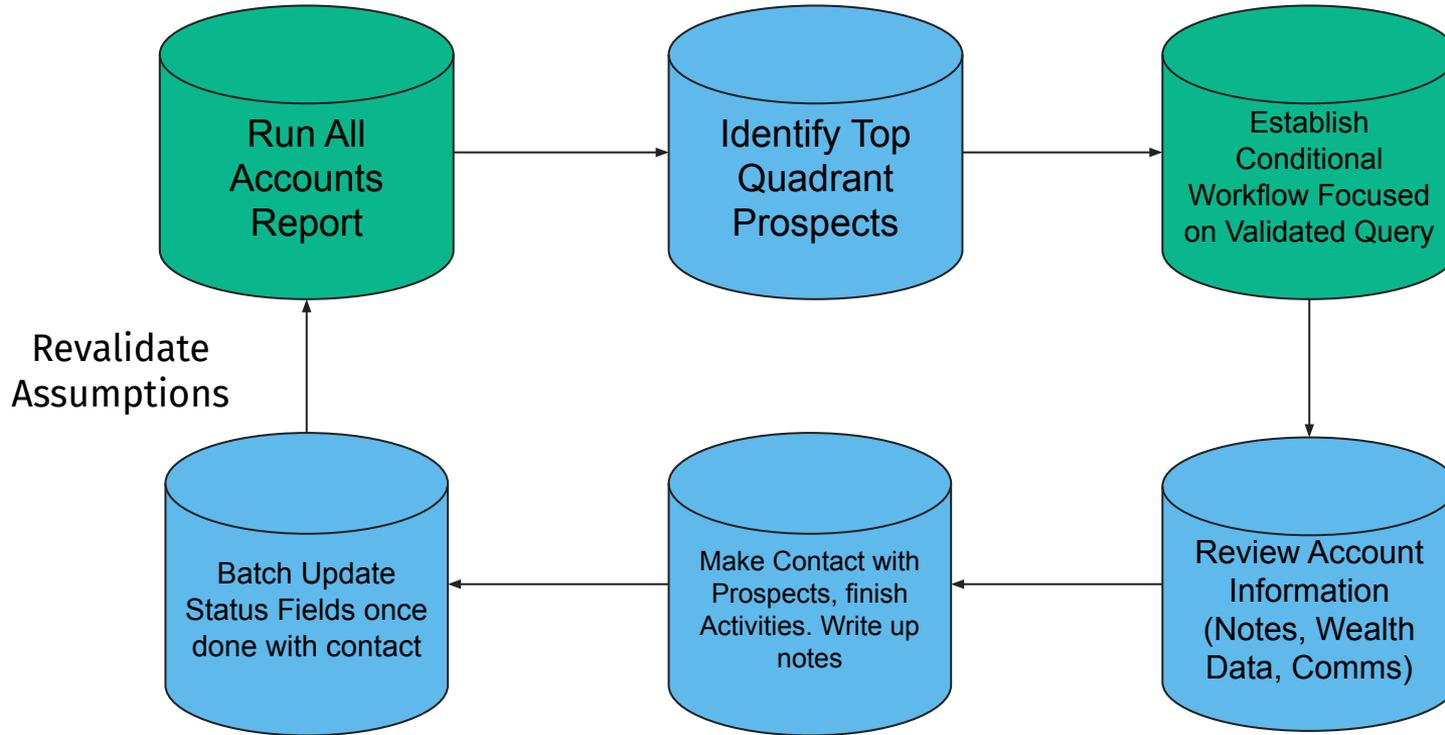


- Accounts
 - Custom Fields
 - Relationships (personal, work)
 - Individual Types
- Prospects / Activities
 - Status Fields
 - Campaign / Fund / Purpose
 - Ask Amounts / Dates
- Communications
 - BCC & Forwarding Email Address
 - System Emails / Letters
 - Login Portal Transaction History



- Dashboards / Reports
 - Prospect Pipeline Widgets
 - Activity Calendars
 - All Accounts Report
- Bulk Edit / Update
 - Prospects / Activities
 - Account Custom Fields
 - Batch Donations
- Advanced Tools
 - Workflow Automation
 - Windfall Integration
 - Neon Moves

Neon CRM Sample Process - Affluence + Affinity



Resources

Next Webinar: Creating An Awesome Monthly Donor Stewardship Plan

- March 30 @ 2pm ET
 - Erica Waasdorp
- [RSVP Here](#)



Brock
Yetso,
CEO



Ulman House Capital Campaign

“We had never done capital, we’d never provided housing. We were pretty much programming and services for patients and families and it was a big change of mission. But it’s been really rewarding for the organization to see the impact on our community.”

- The Changemakers
Livestream Interview

Neon One Resources

Capital Campaigns

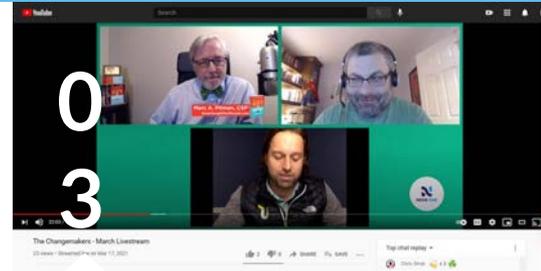
A collection of resources that will help your organization with capital campaign planning.



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Windfall + Neon CRM

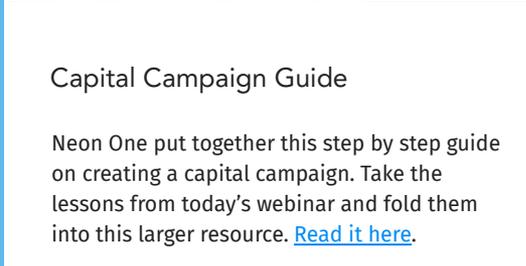
We're thrilled about our new wealth and prospect integration with Windfall data. Append important affluence data so you can focus on your planning. [More info here.](#)



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Changemakers March Interview

For March, [we brought together](#) Ulman Foundation CEO Brock Yetso and Neon One consultant partner Marc A. Pitman to discuss capital campaigns and being a leader.



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Capital Campaign Guide

Neon One put together this step by step guide on creating a capital campaign. Take the lessons from today's webinar and fold them into this larger resource. [Read it here.](#)



Built for Good.