

Prospect Information – What Should We Be Capturing?

This document augments *Boards on Fire*, page 91

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People want to feel seen and known by the organizations they support, so we should be watching for cues they're offering about themselves. If you shared something about yourself on a first date, you'd likely be flattered if the person remembered that and brought it up later. It's a signal that they were paying attention. Here are some things we should watch and listen for about our prospects and donors.

- How do they prefer to be addressed (Ms. or Mrs.? The formal name on their check or their nickname? What are their preferred pronouns? etc.)
- What was their point of entry into the organization? (did they come to an event with a board member or were they served by the organization? Did they sign something at a fair booth? etc.)
- Which aspect of organization's work interests them most?
- How have they been engaged (Have they volunteered, attended events, responded to an online survey, purchased a product with our logo, participated in a focus group?) And did they initiate that engagement, or did we invite it?
- How do they prefer to be communicated with? (mail, email, phone, text?)
- Who else do they know or connect with in the organization? (a board member, a staff person, a volunteer, a beneficiary, other donors?)
- How do they spend their time – do they work? in what field? do they have interests or expertise in some particular area?
- Do they have a spouse or partner (what are their interests or affiliations?)
- Do they have children or pets? What do we know about them?
- How do they get around? (Hummer or Prius, motorcycle or bicycle, transit?)
- Are they vegetarian/vegan? Do we know why? (physiological/allergy or political/environmental choice) (This may shape where you meet them for lunch or how you plan for refreshments at a gathering.)
- Do they drink alcohol? If so, do they prefer beer or wine or spirits? If not, is that choice based on religion or values or being in recovery?
- What religious or cultural traditions might influence their generosity? (Jews might respond to the concept of *tzedakah* or feel compelled by *tikkun alum* (repairing the world), Catholics might respond to guilt, which would not work with Unitarians, who are compelled by their 7 principles. Baptists might feel *called by God*, etc. Even if they're not currently practicing, they may still be influenced by it.)
- Which of the seven donor types do we think they are in relationship to us, and what evidence leads us to believe that? Therefore, what types of messages will resonate with them?
- What personality type do they tend toward? Do they know their Meyers-Briggs score or their Enneagram number, or their colors or whatever?
- Do they seem more responsive to emotions or facts, stories or statistics?

While there are many ways to discover this information (online searches, prospect research professionals, etc.) I think the best way to find it out is to be in communication with people, asking questions, listening for clues they drop as they speak with us, email us, use social media, or attend gatherings. And as we learn these things, we need to add them to the donor's profile in our database or donor records, so we don't lose precious information with staff turnover.

One colleague advised, "Never put anything in your donor profile that you wouldn't be proud to show the donor."