

# Prospect Management

## STRATEGICALLY GUIDE ACTION TO MAXIMIZE RESULTS

A comprehensive prospect management program provides a clear and accessible organization-wide strategy for building, advancing and managing relationships with constituents. A well-developed system can be the difference between moderate performance and exceptional accomplishments.

*More than a program – it's your program.*

Our consultants work with you to assess the strengths and challenges of your current prospect management program. From there, we can provide a comprehensive suite of solutions that precisely meet your needs and keep you on the path to meeting your aspirational goals.



### PROSPECT MANAGEMENT PROGRAM DESIGN

Going beyond the starting framework of policy development, program design results in a fully-formed prospect management system that allows you to optimize fundraising resources at every level. We work closely with your team to review and design policies, processes and procedures that support engagement throughout the development cycle and facilitate change management to ensure successful implementation.



### PROSPECT MANAGEMENT POLICY

We help develop a collaborative prospect management framework that uniquely suits your organization's needs for efficient and effective tracking and monitoring of prospects throughout the development cycle. If you have an existing policy, we review processes you already have in place to identify methods to build upon and strengthen the foundation you've already laid.



### PORTFOLIO OPTIMIZATION

After a wealth screening or a Marts&Lundy Capacity Analysis, you have a plethora of data by which to segment your prospect pool. We work with you to facilitate the assessment of development officer portfolios, examine portfolio management and identify potential enhancements that will allow your team to prioritize activity and strengthen portfolios using data already at your fingertips.



### PROSPECT POOL ANALYSIS

We conduct a quantitative review of your donor base/prospect pool, including wealth screening data, giving history, engagement history and portfolio assignments. Data visualizations are complemented by actionable recommendations fueled by best practices and deep expertise.



### PROSPECT STRATEGY DEVELOPMENT

We facilitate intensive work sessions wherein development staff create collaborative and focused prospect strategies for top prospects in preparation for a campaign or focused fundraising efforts.



### PERFORMANCE METRICS ANALYSIS

We assess the objectives of your current gift officer performance metrics, analyze historical outcomes of key performance metrics you track and highlight the strengths and opportunities presented by historical activity.



### GIFT TABLE DEVELOPMENT

It's critical to identify constituents who are likely to make each of the major gifts on your campaign gift table, but it can be challenging to work through names and lists in what feels like a meaningful way. We guide you through strategically building a gift table that reflects your highest capacity prospects with the highest likelihood of giving alongside the best opportunities for impact.



### PROSPECT MANAGEMENT TRAINING

Our training program is structured to suit your needs and can cover a myriad of topics for a variety of audiences, including prospect management professionals, gift officers and managers of gift officers.



### ONGOING PROSPECT MANAGEMENT COUNSEL

We provide specialized counsel on prospect management program development or refinement customized to suit your evolving needs.

We welcome the opportunity to discuss your prospect management needs and aspirations. To schedule a consultation, please contact us at [info@martsandlundy.com](mailto:info@martsandlundy.com) or +1 201.460.1660.