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Scaling Personalized Cultivation: Part Four of the New Frontiers in Pipeline Development Webconference Series

## Translating Insight Into Action

### A Discussion and Self-Reflection Guide

#### Instructions:

Use the following discussion/self-reflection guide to connect today's webconference presentation to your own experiences and institutional context.

1. How many discovery visits do your MGOs do on average every year? At the current rate, how many years would it take them to visit 2,500 discovery prospects?
2. What is the constituent experience like for high-net-worth individuals who do not give and are not assigned to major gift officers (e.g., receive event invitations, annual giving solicitations, etc.)? Is there much about that experience that would inspire them to take a visit with an MGO (assuming they're not already inclined to do so)? What is lacking in that experience that you would like to improve upon in the next 18 months?
3. What strategies does your institution have in place to "warm" unresponsive prospects prior to MGO outreach?
4. Does your alumni relations playbook more closely resemble "Alumni Relations 1.0" or "Alumni Relations 2.0" as depicted on slide 13? If you are closer to the former, what barriers do you face to changing that model?
5. What in-person alumni engagement programs does your institution currently offer specifically for high-potential prospects? What programs could you offer in the future?
6. Who within the alumni relations shop is accountable for engaging high-potential prospects? If no one currently is, who is well-positioned to take on a portfolio of engagement prospects?
7. Which annual giving campaigns do you dedicate to upgrading high-potential prospects? Which elements of the campaign contribute best to that goal (e.g., large priority mail envelope, special scripting around investments and value, multi-page color-printed proposal, etc.)?
8. How does your development team currently use digital channels to engage high-potential prospects at scale? How might your team increase their efforts in this area?

# Strategy Overview

| Tactic  | My Institution Should Prioritize This Tactic       | Notes and Next-steps |
|---|--|----------------------|
| <p><b>High-Touch Prospect Communications</b><br/> <i>McGill University</i><br/>                     Marketing/communications segments high-potential unassigned prospects for customized messaging and engagement-outcome tracking.</p>   | <p>1 2 3 4 5<br/> <i>Disagree</i> <i>Agree</i></p> |                      |
| <p><b>Prospect "Warming" Campaigns</b><br/> <i>Rutgers University</i><br/>                     Targeted engagement communications nurture leads and warm prospects prior to visit-scheduling attempts.</p>  | <p>1 2 3 4 5</p>                                   |                      |
| <p><b>Pipeline-Focused Alumni Programming</b><br/> <i>DePaul University, University of Michigan, Marquette University</i><br/>                     Special-interest engagement events target high-potential alumni segments and ensure that alumni relations programming yields high ROI.</p> | <p>1 2 3 4 5</p>                                   |                      |
| <p><b>Alumni Engagement Portfolios</b><br/> <i>Elon University</i><br/>                     Alumni relations staff members are assigned portfolios of alumni to engage. Portfolios are segmented by long-term major-gift potential to prioritize outreach efforts.</p>                        | <p>1 2 3 4 5</p>                                   |                      |
| <p><b>Major-Gifts-Lite Proposals</b><br/> <i>Oregon State University</i><br/>                     Four-page color-printed personalized prospectuses outline the case for giving and solicit mid-level gifts from unmanaged prospects.</p>   | <p>1 2 3 4 5</p>                                   |                      |

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|---|---|----------------------|
| <p><b>Social Media Solicitation Testing</b><br/> <i>Massachusetts Institute of Technology</i><br/>                     Advancement staff analyzed engagement data to determine what resonates with population and sent solicitations for a similarly-themed fund.</p>                 | <p>1   2   3   4   5<br/> <i>Disagree</i>                      <i>Agree</i></p> |                      |
| <p><b>Digital Gift Officers</b><br/> <i>Davidson College, Cornell University</i><br/>                     Gift officers cultivate and solicit prospects for leadership annual gifts through a multichannel remote strategy (phone, email, social media, videoconferencing, etc.).</p> | <p>1   2   3   4   5</p>  |                      |