Discovery Checklist

☑ **CAPACITY**
The Rating. Where this came from (Referrals, Business, Screening, Other).

☑ **RELATIONSHIP**
Relationship to the Organization/Case, the Cause, the Project, etc. Connectors, Natural Partners, Other Connections.

☑ **GIFT HISTORY**
Keep it simple. You're looking for LAST… LARGEST… and TOTAL.
*Don't forget PLANNED GIFTS.

☑ **TIMING**
Should look at timing around organization, life, business, family, etc.

☑ **OTHER GIFTS**
Other known philanthropy. Organization and size of gifts. Existing pledges or commitments elsewhere, if possible.

'GUT' NOTES
What is your gut instinct telling you re: the prospect

ADDITIONAL DISCOVERY/RESEARCH REQUIRED
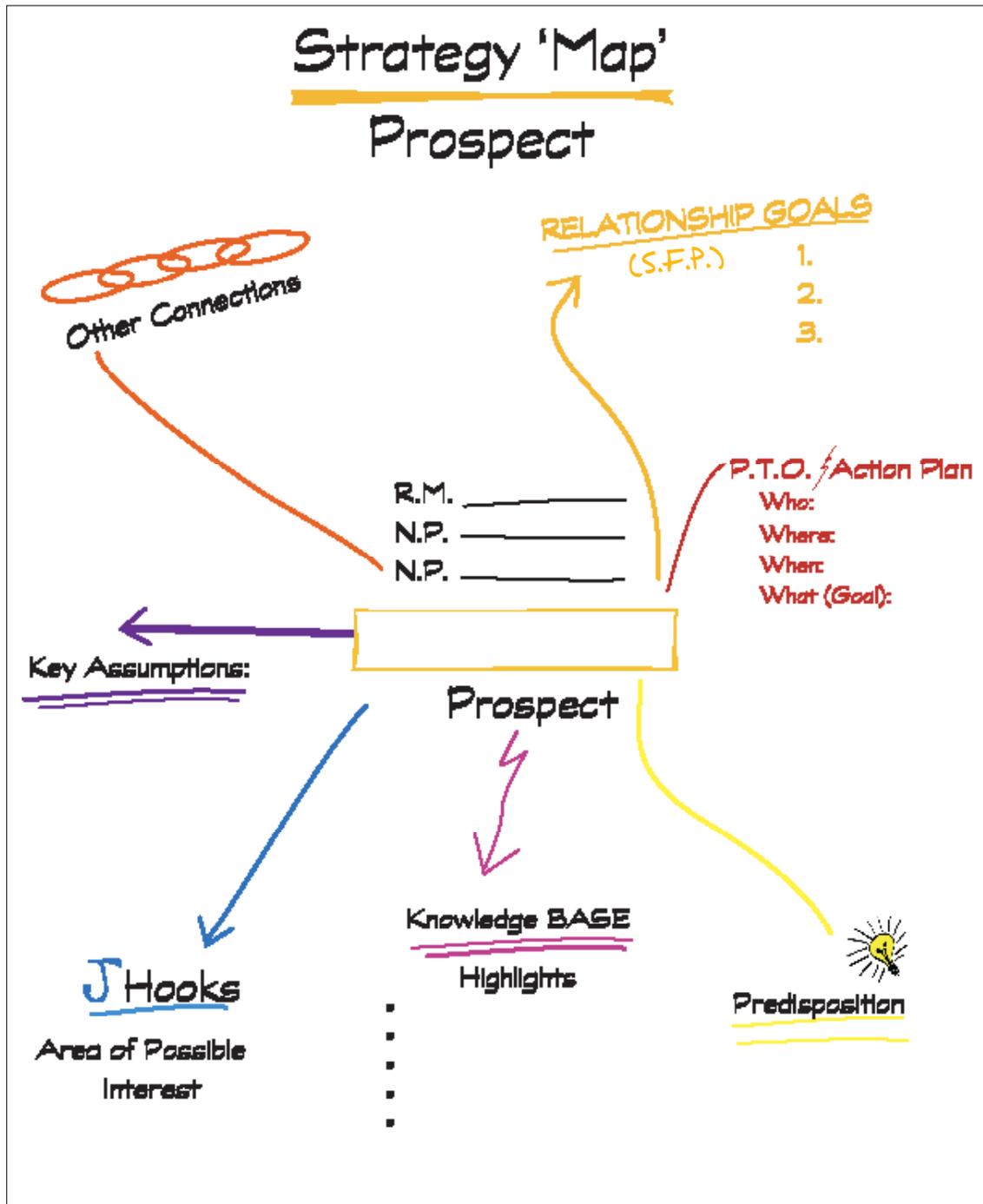
Relationship Checklist

- ☑ **PROSPECT:**

- ☑ **RELATIONSHIP MANAGER:**

- ☑ **NATURAL PARTNERS:**

- ☑ **OTHER CONNECTIONS:**

- ☑ **RELATIONSHIP GOALS:**

  1.

  2.

  3.

- ☑ **'HOOKS'/POSSIBLE AREAS OF INTEREST:**
  (Suggested Projects/Programs)

- ☑ **POSSIBLE CHALLENGES:**

- ☑ **PREDISPOSITION IDEAS:**

- ☑ **ACTION PLAN:**
  (Next Steps)

Relationship Mind Map

Bonus: I've taken the liberty of providing you a STRATEGY MAP as a great way to get the creative juices going with a small group of people. I'm really big on this whole 'MIND-MAPPING' thing. Tony Buzan, Michael Gelb, et al. have systemized a revolutionary way of planning and note taking that uses the incredible powers of ASSOCIATION and IMAGINATION already existing in our brains. MIND-MAP... draw! Use your own 'shorthand'.

JUST DO IT!

Relationship Mind Map Ex.

Strategy 'Map'

Prospect

RELATIONSHIP GOALS
(S.F.P.)
1.
2.
3.

Other Connections

R.M. _____
N.P. _____
N.P. _____

P.T.O. /Action Plan
Who:
Where:
When:
What (Goal):

Key Assumptions:

Prospect

Knowledge BASE

Highlights

Predisposition

♪ Hooks

Area of Possible
Interest

Lay this out on a Large Flipchart for group engagement.

Presentation Checklist

- ☑ **PROSPECT:**

- ☑ **RELATIONSHIP MANAGER:**

- ☑ **NATURAL PARTNERS:**

- ☑ **WHO...** needs to be there (PRESENTATION TEAM)

- ☑ **WHAT...** do we want to accomplish (GOALS)

- ☑ **POTENTIAL CHALLENGES (OBJECTIONS)...** and **RESPONSES**

- ☑ **WHERE...** BEST place for 'VISIT' (Start at Our Facilities)

- ☑ **HOW...** will we PREDISPOSE

- ☑ **WHEN...** is the BEST TIME

- ☑ **FLOW...** of the VISIT

- ☑ **PRESENTATION TOOLS...** NEEDED

- ☑ **POSSIBLE PROJECT/PROGRAMS...**
  (No Detail/Just Overview)

- ☑ **NOTES:**