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# Identifying Prospects/Prospect Research

Rachel Hadley-Leonard – RHLConsulting

Thank you for joining, the webinar will start at ET 14:00 / PT 11:00 / GMT 18:00  
When the webinar starts your microphone will be muted, but you can use the chat box to ask questions during the webinar, and at the end there will be time to answer these questions.



# Hello!

## Rachel Hadley-Leonard

- Background in education & marketing
- Teacher & Senior Leader– Maintained & Independent Schools
- Marketing in industry – John Lewis, AbA etc.
- Marketing in schools – inc. Marketing Manager, Head of Marketing, Alumni Relations Manager, Development Director
- Former Director and Chair of Admissions, Marketing & Communications in Independent Schools (AMCIS)

### Currently:

- Independent Schools' Development & Marketing Consultant
- Judge for Times Educational Supplement Independent Schools Awards
- Judge for global InspirED Brilliance Marketing & Fundraising Awards
- Contributor to All Party Parliamentary Group for Independent Education
- Professional mentor
- Independent School Governor





# Identifying Prospects & Prospect Research

- Who are they?
- Where are they?
- How do we find them?
- What do we find out about them?
- What next? – moving them along



# Who?

What do we want them to do?  
(e.g. volunteer/annual donor/major or leading gift donor)

Knowing where to look - obvious places v less obvious places

Not who you're thinking?

What indicators do you have?  
(e.g. cars, house/s, holidays, career, fame)

How reliable are these indicators?



# Where?

## External v Internal Intelligence

### External

More scientific?  
Comprehensive data  
Can be expensive

### Internal

Personal knowledge  
Time consuming  
Cheaper/free

**Use both!**



# A quiet night in

## Scoping evenings:

**Human resource:** Head, Archivist, long serving staff, former staff, Director of Sport, Music etc.

**Data:** Potential Prospects from CRM (Pipeline stage)

**Food & Drink:** Lots



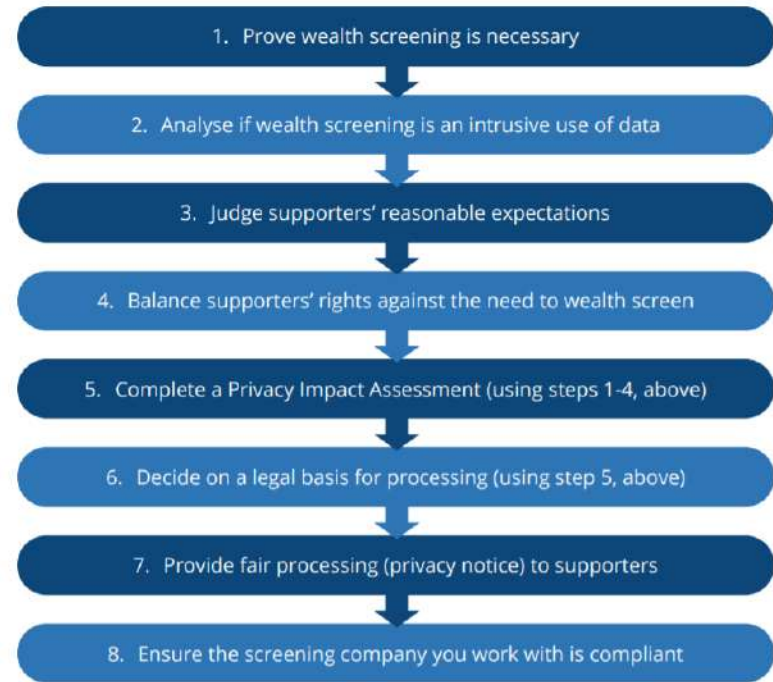
# Wealth Screening & GDPR

(Privacy Regulations)

[https://www.factory.com/docs/Factory\\_Guide\\_to\\_GDPR\\_Co\\_mpliant\\_Screenings.pdf](https://www.factory.com/docs/Factory_Guide_to_GDPR_Co_mpliant_Screenings.pdf)

Information Commissioner said in a statement "I want to be clear. Profiling individuals for a fundraising campaign itself is not against the law, but failing to clearly tell people that you're going to do it, is"





Factory  
Guide to GDPR-Compliant Wealth Screening  
January 2018



# Donors know donors

Cultivating your ambassadors

# Capacity & Affinity

Why you need both!

# Building a picture

Making your database work for you

# Prospect Research - Building a picture

What to undertake

Individual/other causes

Charitable giving

Board directorships

Interests (link to campaigns)

**School connections**

Family

Links to other families

Level of wealth



# Prospect Research on a Budget

- Excellent CRM housekeeping
- Quiet nights in
- Google!
- Eyes & ears everywhere – other prospects
- Existing relationships

# Moving them along...

- Regular time slot dedicated to prospect pipeline
- Set SMART targets for moving prospects along
- Continually add to prospect list
- Don't be afraid to relegate!

**THANK  
YOU**



# Questions?



**RHL CONSULTING**  
MOVING SCHOOLS FORWARD

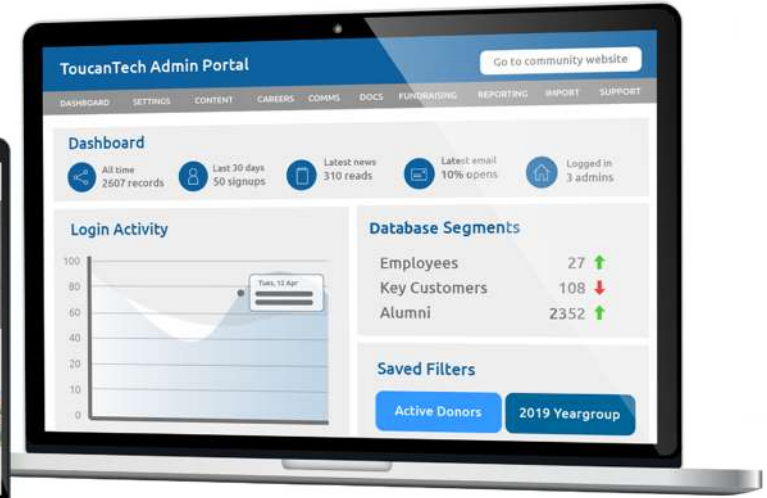
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# About ToucanTech

ToucanTech is an easy, affordable and beautiful fundraising CRM and website software to manage your supporter records, email newsletters, online payments, events, mentoring, careers and more!



**Any questions?**

Please contact Amy – [amy@toucantech.com](mailto:amy@toucantech.com)  
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