COMMUNITY CORPORATE

WHERE TO START WHEN YOU DON'T KNOW WHERE TO START!

WHAT WE'LL COVER

- What is community corporate

- Context

- 4 areas to focus on

- A few other take homes

- How to balance your time

No detailed dramatic revelations that mean you can id

WHAT IS COMMUNITY CORPORATE?

- Your charity set up / Size of account / Method of contact/ Location

None of it really matters – there's a supporter who needs stewarding (who happens to work in a business).

- But it does matter if you are targeted - build the right contacts in the right places!
- Find out what it means in your charity or start to create definitions

WHAT'S YOUR CONTEXT?

Learning:

- What is your org doing well? Badly?

- How do you find out?

Expectations:

- What's your income expectation? Or do you have one?

- Is it realistic/how was the number arrived at?

1   SEARCHING FOR NEW PARTNERS

Historically successful partnerships – themes or trends

- Search / Social
- Locations
- Local papers
- People!

2   PIPELINE – BUILD ONE!

QUALIFY

Qualify your pipeline …
- Giving programme?
- Strategic fit
- Reputational issues
- When they tend to give if there's a pattern?
- Level of ask
- Contacts

PRIORITISE

- Who is first? Why?
- What's the proposition & ask?

CHECK THE GOODIE BAG!

PROSPECT INFO TEMPLATE

	A	B	C
1	Company Name:		
2			
3	What is their mission statement?		
4	What are their products and services?		
5	Who is their audience?		
6	How do they fit with our charity, and do we have a shared audience?		
7			
8	**About the company**		
9	What's their turnover?		
10	What's their profit?		
11	What mattes to them beyond profit? Do they talk about ESG goals?		
12			
13	Have they made public philanthropy commitments (eg B Corp)		
14	Is there an established charity programme?		
15	What is their annual giving level?		
16	Previous charity work and time scales?		
17	How much did they donate?		
18			
19	How many staff do they have?		
20	Do staff have skills we might need or be able to use?		

Sheet1

Ready   Accessibility: Good to go

PIPELINE TRACKER

	A	B	C	D	E	F	I	J	K	
1						Value or Prospect Value	Research (0%)	Qualify (0%)	Engage (0)%	Prope
2	Account	Org	Stage	FY	Activity					
3										
4										
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Sheet1   Sheet2

Ready   Accessibility: Investigate

3   ACTION - MAKING THE MAGIC HAPPEN

MAKING CONTACT

- **Can anyone introduce you (see end)**
- Pitch
- Phone first!
- Email second
- Deck/proposal
- Follow up

GETTING IT OVER THE LINE

- Expectation of Meeting
- Get personal – local impact, stories and visuals
- Aha moment?
- Take home/leave behind
- Clearly ask for what you want!
- Timescale for decision
- Feedback

4   MANAGING & MAINTAINING THE RELATIONSHIP

EXPECTATIONS

- Set expectations - frequency of contact, type of support
- 80/20
- Surprise and delight
- Renewal or review points

RESOURCES

- Reuse content
- Automate
- CRM/Spreadsheet
- Diary

A FEW OTHER USEFUL BITS

- **People** – who knows people you haven't thought about!

A FEW OTHER USEFUL BITS

- **People** – who knows people you haven't thought about!
Take home: Network and Relationship Map Prompt

- **Pitching** – practice, practice, practice (with a colleague or phone a friend)

- **Contracting** – legal and practical, know your Code! Do you need a Commercial Participation Agreement? If your charity doesn't have a template, you should have one!

- **Admin –** don't skip this bit! Add the dates to calendars and CRMs NOW – you *will* lose track and drop a ball

- Feedback – learn and grow!

BALANCE YOUR TIME

Searching   1 hour a week

Pipeline   1.5 hours a week

Action   3 hours per week

Managing   2.5 hours per week

FINALLY …

OBLIGATORY ACRONYM

- Learning
- Expectation
- Searching
- Pipeline
- Action
- Manage/Maintain

- **LE SPAM**

YOUR TOOLKIT

- Manage your time
- Pipeline tracker, prospect list and relationship map tools
- CRM or spreadsheet – honestly, either is fine
- Access to assets like stories, images etc
- Tenacity and resilience – those key fundraising characteristics again

Q&A

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