

Big League Research Management



Strategies for Both Large and
Small Shops

Big League Research Management

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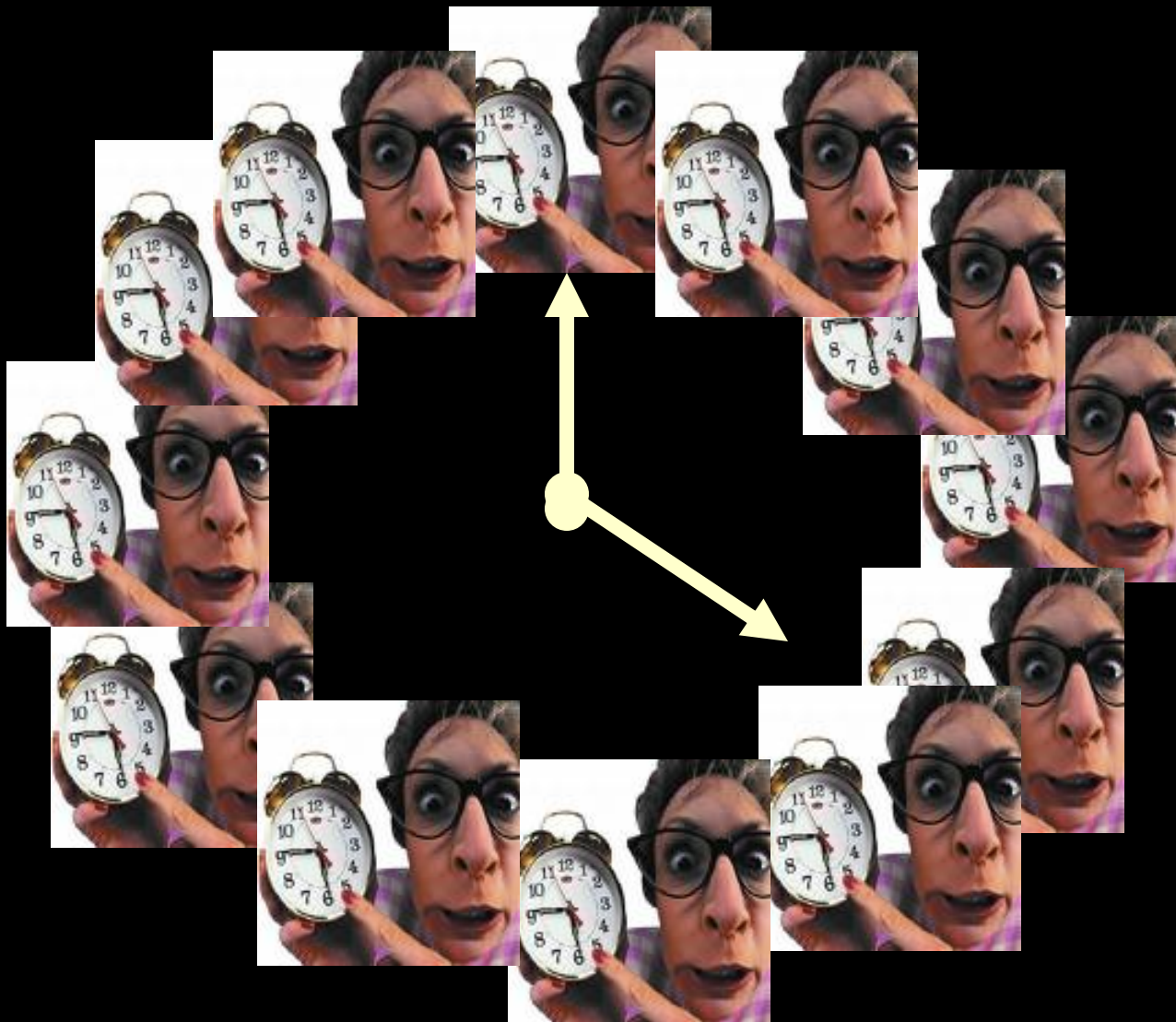
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Research Management Challenges



A Play in Three Acts

Act Two: You Need **WHAT** In an Hour?



Act Three: Will the REAL Bob Smith Please Stand Up?



Common Threads

- Prioritizing
- Communicating
- Managing Expectations
- Delegating
- Motivating
- Short-Term Versus Long-Term Needs

Prioritizing Your Workload



Competing Priorities

- Events
- People
- Appointments
- Prospect Lists
- Other Projects As Assigned...

Priorities: What's Important?

- The 80/20 Rule
- Important vs. Urgent
- Whose Requests Come First?
- Which Appointments Come First?
- Which Events Come First?
- Consult with Higher-Ups When Necessary

Priorities: Tools

Date Due	Researcher	Purpose	Comments	Completed
12/30/07	Burkett	Cultivation		01/02/08
12/30/07	Greenberg	Cultivation	CFO of ABC firm; son of Ann and Sam Smith	01/02/08
12/30/07	Greenberg	Cultivation		01/02/08
12/30/07	Greenberg	Qualification	Jane knows personally, car dealer; wants to know where he's giving	01/16/08
01/04/08	Greenberg	Cultivation		01/11/08
01/04/08	Greenberg	Cultivation	Boston -huge wealth	01/09/08
01/10/08	Greenberg	Qualification		01/22/08
01/07/08	Burkett	Prof. Mor-Yosef's St Petersburg visit		01/03/08
01/07/08	Burkett	Prof. Mor-Yosef's St Petersburg visit	Contributor to the Holocaust Museum	01/04/08
01/10/08	Burkett	Appt. for Prof. Nava Ben-Zi	Sam and Ellie set up appt. Interested in Education	01/09/08
01/10/08	Greenberg	Identification	no information found	01/17/08
01/11/08	Burkett	Cultivation	Exec. Committee Prospects	02/07/07
01/11/08	Burkett	Cultivation	Exec. Committee Prospects	07/23/07
01/11/08	Burkett	Cultivation	Exec. Committee Prospects	01/07/08
01/11/08	Wazeter	Cultivation	Exec. Committee Prospects	01/10/08
01/11/08	Burkett	Cultivation	Exec. Committee Prospects	01/09/08
01/11/08	Greenberg	Cultivation	Exec. Committee Prospects	10/17/07
01/11/08	Burkett	Cultivation	Exec. Committee Prospects	01/08/08
01/11/08	Greenberg	Cultivation	Exec. Committee Prospects	10/08/07
01/11/08	Greenberg	Cultivation	Exec. Committee Prospects	10/18/07
01/11/08	Gross	Cultivation	Exec. Committee Prospects	06/08/06
01/11/08	Burkett	Cultivation	Exec. Committee Prospects	01/09/08
01/11/08	Burkett	Cultivation	Exec. Committee Prospects	01/08/08
01/11/08	Greenberg	Cultivation	Exec. Committee Prospects	07/20/07
01/11/08	Burkett	Cultivation	Exec. Committee Prospects	01/07/08
01/11/08	Burkett	Cultivation	Exec. Committee Prospects	10/23/07

Critical Information:

Who is requesting?

Date of request?

Purpose

Due Date

Date of Meeting

Priorities: Tools

Projects Grid	Date Assigned	Assigned To	Completed Date	Comments
Scanning all paper profiles	12/01/06	Summer Intern	ongoing	Will try to empty out file cabinets in corridor and have copies of all previously completed profiles scanned into PM.
29 most powerful families in NY	12/26/06	DG	03/01/07	Check names against PM. Enter information where applicable. Develop prospect grid for new ones.
Confidentiality Statement	12/01/06	GB	On hold	Develop statement for review and signing by development staff
Blackbaud		MW	ongoing	Continue to move this process along
Prospect Management Instructions		MW	12/28/06	Have finalized version ready for distribution after Mid-Winter for visiting ADC's
Contact Report		MW	12/28/06	Have finalized version ready for distribution after Mid-Winter for visiting ADC's
Tracking Manual Update		GB	01/12/06	Have finalized version ready for distribution after Mid-Winter for visiting ADC's
Retiring contacts		GB	02/19/07	Need to "retire" contacts in tracking when they are no longer actively involved with prospects
SEC options -top executives	12/27/06	All	12/29/06	Article explaining stock options and compensations of top executives. Cross reference against PM

Priorities: Tools

Research Requests as of 4/1/2008 listed in ascending order by due date

Prospect - Researched	Requesting - DO	Due Date
Capt. John Smith	Joe DOD	4/10/2008
Pocahontas	Sally DOD	4/10/2008
John Rolfe	Joe DOD	4/11/2008
Joseph lotsamoney	Sally DOD	4/15/2008
Sally GotRocks	Polly DOD	4/20/2008

Research Completed as of April 30, 2008

The following report lists total number of research requests completed by Division

Department	# Requests	Research Identified
School of Medicine	20	2
School of Business	15	5
Humanities & Sciences	14	3
School of Arts	27	10
School of Nursing	9	1
School of Allied Health	12	3
School of Law	17	4
Totals:	114	28

Priorities: Tools

March 2008		Development Division Dates to Remember					Adar I/Adar II 5768	
Sun	Mon	Tue	Wed	Thu	Fri	Sat		
							1 Adar I 24	
2 Adar I 25	3 Adar I 26 <i>Development Division Monthly Meeting</i>	4 Adar I 27	5 Adar I 28 FRT Meeting	6 Adar I 29 Exec Committee Meeting	7 Adar I 30 Rosh Chodesh	8 Adar II 1 Rosh Chodesh		
March 3rd—10th: Eduscope Student Visit in New Jersey and Philadelphia								
9 Adar II 2 Eduscope Student Visit in NJ and Philadelphia	10 Adar II 3	11 Adar II 4	12 Adar II Major Gifts Department Meeting	13 Adar II 6	14 Adar II 7	15 Adar II 8		
16 Adar II 9	17 Adar II 10	18 Adar II 11 Wom! Founders event Jane Doe (repeated)	19 Adar II 12	20 Adar II 13 Tu B'Shvat Passover Mailing Due	21 Adar II 14 Purim	22 Adar II 15 Shushan Purim		
Hadassah International Conference in Israel								
23 Adar II 16 HI Conference in Israel R/BC First Year Presidents Orientation	24 Adar II 17 R/BC First Year Presidents Orientation	25 Adar II 18 R/BC First Year Presidents Orientation	26 Adar II 19 R/BC First Year Presidents Orientation	27 Adar II 20	28 Adar II 21	29 Adar II 22		
30 Adar II 23 Associates Day	31 Adar II 24 South Florida ABC Meeting							

Developed by Namrata Agnihotri, Hadassah

Communication



Communication

- Getting information needed for research
- Getting information to the end users
- Some methods of sharing:
 - Meetings
 - Intranet
 - Newsletter
 - Calendars - Making Friends with the “Keeper of the Calendar”

Research Request Hall of Fame

Please find someone with the last name of Kim in South Korea, who is or was an official in the government.

Would you please put (insert the name of a very large international company here) on the profile list. I am looking for a lady, maybe in her 50's, New York. I don't have her name...

A development officer heard about two prospects from a trustee at a cocktail party; he then artfully combined the first name of one with the last name of the other and handed it over as a research assignment.

A development officer came back from an event and handed me a cocktail napkin, still damp, with a name and number on it...

I was talking to someone when I was in San Francisco who told me he used to live near one of our alums' parents who was loaded and who loves the school. I think he lived in Maryland ...or maybe North Carolina. Can you find him?

Please find info on a friend of [insert name of billionaire]. Here's his cell phone number.

"I think his name was Something Himmel-something. His wife's name is Lisa or Maria or Julie or something. And she has a different last name. Johnson or Smith or something like that."

Please find the alumnus whose husband is a Cordon Bleu chef...

Communicating About the Research Request

- The research request
 - Request forms
 - Clarify hazy or confusing information
 - The “Reference Interview” method
 - Education at the point of the research request is helpful for managing expectations

Managing Expectations



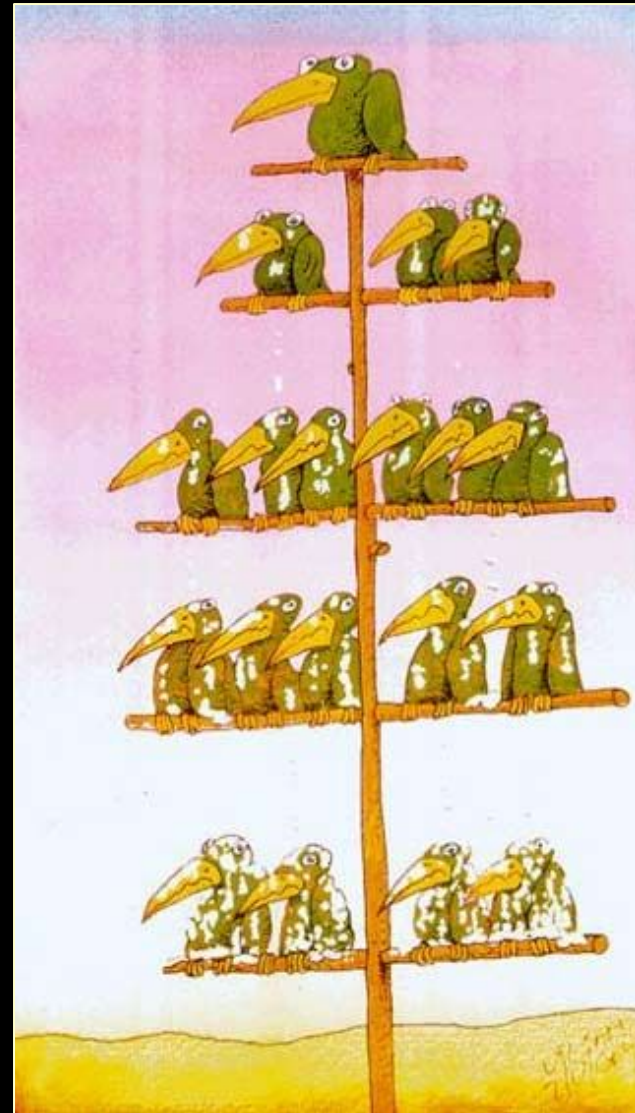
Managing Expectations

- Be clear about what you can and cannot provide
 - What is available publicly
 - What is available ethically
 - What research tools your organization has available
 - Time and manpower

Managing Expectations

- Managing timelines/project management
- How much information is needed? For what purpose?
 - Levels of Research
- Know when to stop!
- Know when to say “No”

Delegation



Delegation

- Why Delegate?
 - Take advantage of staff strengths, interests and knowledge
 - Training opportunity
 - Opportunity for personal development – yours and theirs
 - Opportunity to empower staff

Delegating - Resistance

- “What if they make mistakes?”
- “It takes too much time to delegate”
- “I can do it more efficiently myself”
- “How can I keep control of the research others are doing?”
- “What if they resent me giving them more work?”

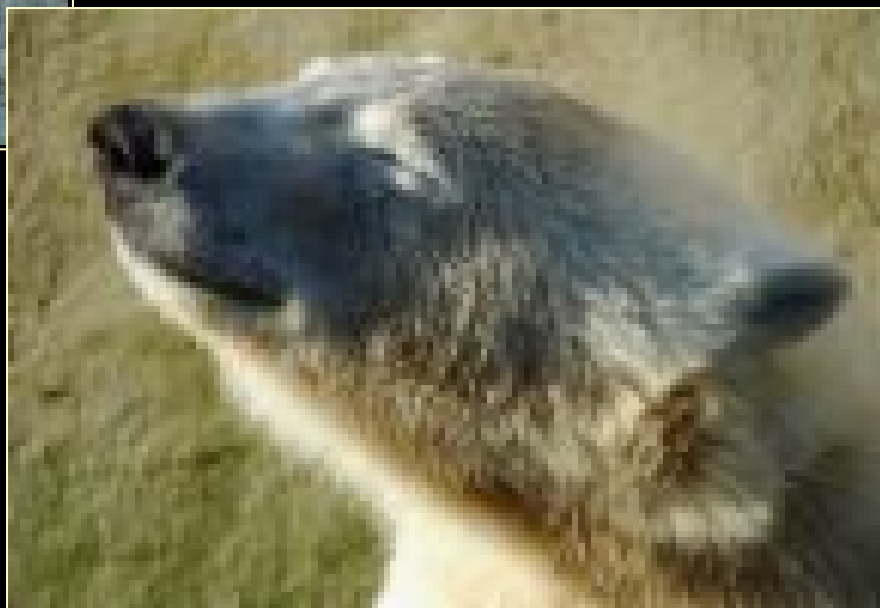
Delegation

- Requires:
 - Planning, Organizing, Coordinating
 - Motivating and Providing Leadership
 - Communicating Effectively and Clarifying project parameters
 - Hiring and Training Well!

Delegating: One-Person Shop

- Non-Researchers as Backup Researchers
- What should you delegate?
- Outsourcing
- Interns
- Training others to do some of their own research

Motivating



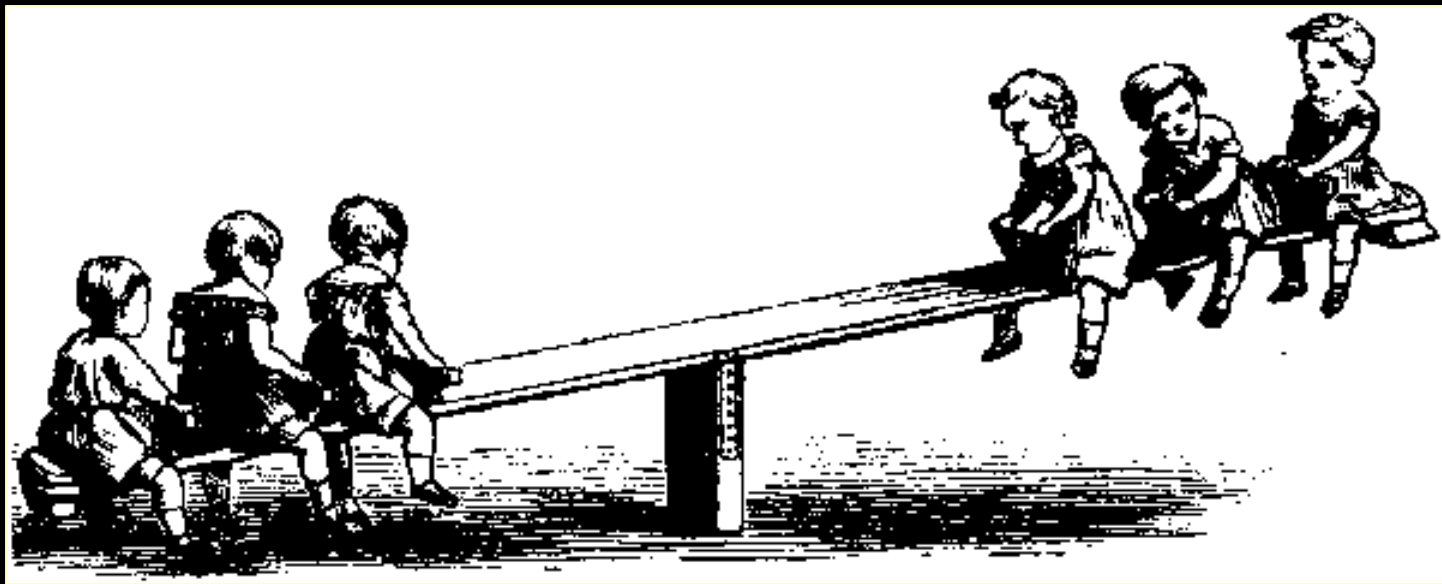
Motivating

- Inspiration Versus Perspiration
 - Open Communication
 - Avoiding the Research “Black Hole”
 - Productivity versus Factory Line
 - Dividing Tasks
 - Professional Development – Network!
 - Ability to make a difference at work

Motivating

- Valuing Staff
 - Recognition
 - Take Time to Celebrate
 - Be an advocate for your staff
 - Career Development Plans
 - Listen for what motivates your staff
 - A simple “Thank You” or “Good Job”

Short-Term vs. Long-Term Goals



Short Term Requests

- Tend to be “reactive”
 - Event Briefings
 - Deadline-driven Profile and Information Requests
 - Responding to VIPs

Long-Term Projects

- Tend to be “proactive”
- Developing or Improving a Prospect Management System
- Research Procedures Manual or Department Ethics Policy
- Proactive Research
 - Screening Results
 - Data Mining
 - Building Prospect Lists for Long-Term Projects
 - Campaign Planning
- Training Initiatives

Long Term Versus Short Term

	Urgent (Short Term)	Not Urgent (Long Term)
Important	Activities: Crises and Fire-fighting Pressing Problems Deadline Driven Requests from the top	Activities: Capacity Building Relationship Building Planning Recognizing New Opportunities Implementing Systems Developing Professional Knowledge
Not Important	Activities: Status Quo Interruptions Unprepared Meetings Other People's Work	Activities: Time wasters – some e-mails, some phone calls, office visits, trivia, busy work

Based on Stephen Covey "The Seven Habits of Highly Effective People"

Focusing on the Long-Term

- Where Does the Time Go?
- Break Long Term Projects into Short Term Pieces
 - Action Plan
 - Estimate Time Accurately
- Keep the Project in the Forefront
 - Regular Updates
 - Negotiate a Due Date

Questions?

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