



INSIGHT
PHILANTHROPY
RESULTS

EXPLORE

PD25

New Depths

August 19-22, 2025

Hilton Baltimore Inner Harbor Hotel, Baltimore, Maryland

DESIGNING AN EXCEL-LENT PROSPECT MANAGEMENT REVAMP

EXPLORE
PD25
New Depths

While you're waiting, complete your
session evaluations in the mobile app!

INTRODUCTIONS

Emily Kahn

- Deputy Director, Prospect Management, Yale University
 - 18 years in Prospect Development
 - Prospect research, prospect management and data analytics positions in higher education and member-based organizations
 - Experience in solo, mid-size and large shops



INTRODUCTIONS

Mikhaila Eller

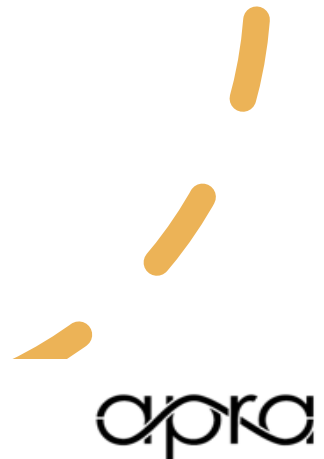
- Prospect Management Analyst, Yale University
 - Experience in prospect research and management, prospect identification and tracking, and database administration
 - Experience in the arts, social services, and education sectors, and member-based organizations
 - Certified Salesforce Administrator



PROSPECT MANAGEMENT DEFINED

Apra (2014): “Managing, tracking, and reporting on an organization’s activity with its constituent and prospect pools and making recommendations to influence fundraiser and campaign activity positively”

- Portfolio Optimization
- Prospect Strategy
- Fundraiser Training
- Prospect Management Policy
- Fundraiser Metrics
- Et Cetera...



YALE CASE STUDY

- Prospect Development teams in Central and the larger schools/units
- 2025 Central Prospect Development
 - Prospect Research
 - High Net Worth
 - Data Analytics
 - Due Diligence
 - Prospect Management
- Blackbaud CRM
- 500+ “Prospect Management Specialists”
- Central Prospect Management Staffing
2019-2022; April 2024-present



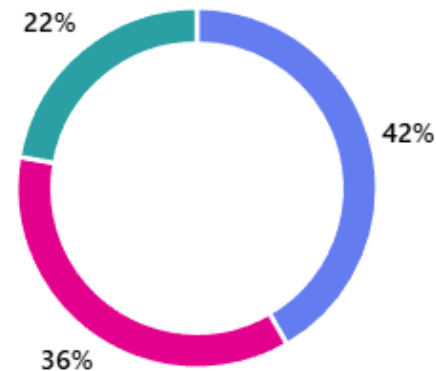
PROSPECT MANAGEMENT SYSTEMS SURVEY

June 2025 posted survey on Prospect Management Systems to Apra, AASP & LinkedIn

- 434 total responses
 - 73 Human responses
 - At least 8 different sectors represented
 - Higher Education, Healthcare, and Environmental Conservation were the top 3

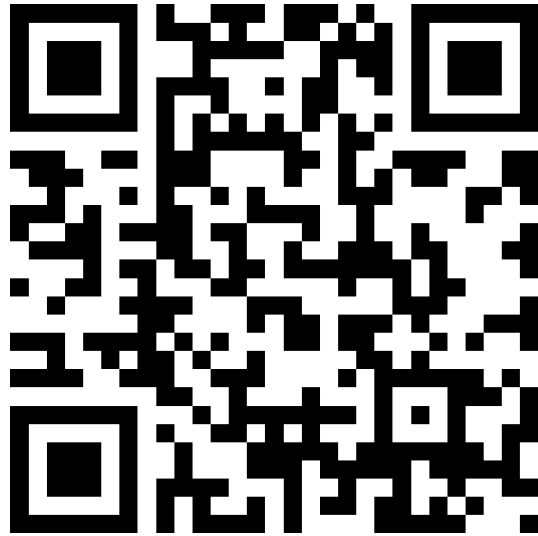
Shop Size results:

● Small (1-3)	30
● Mid-Size (4-9)	26
● Large (10+)	16



KEY COMPONENTS & INDICATORS

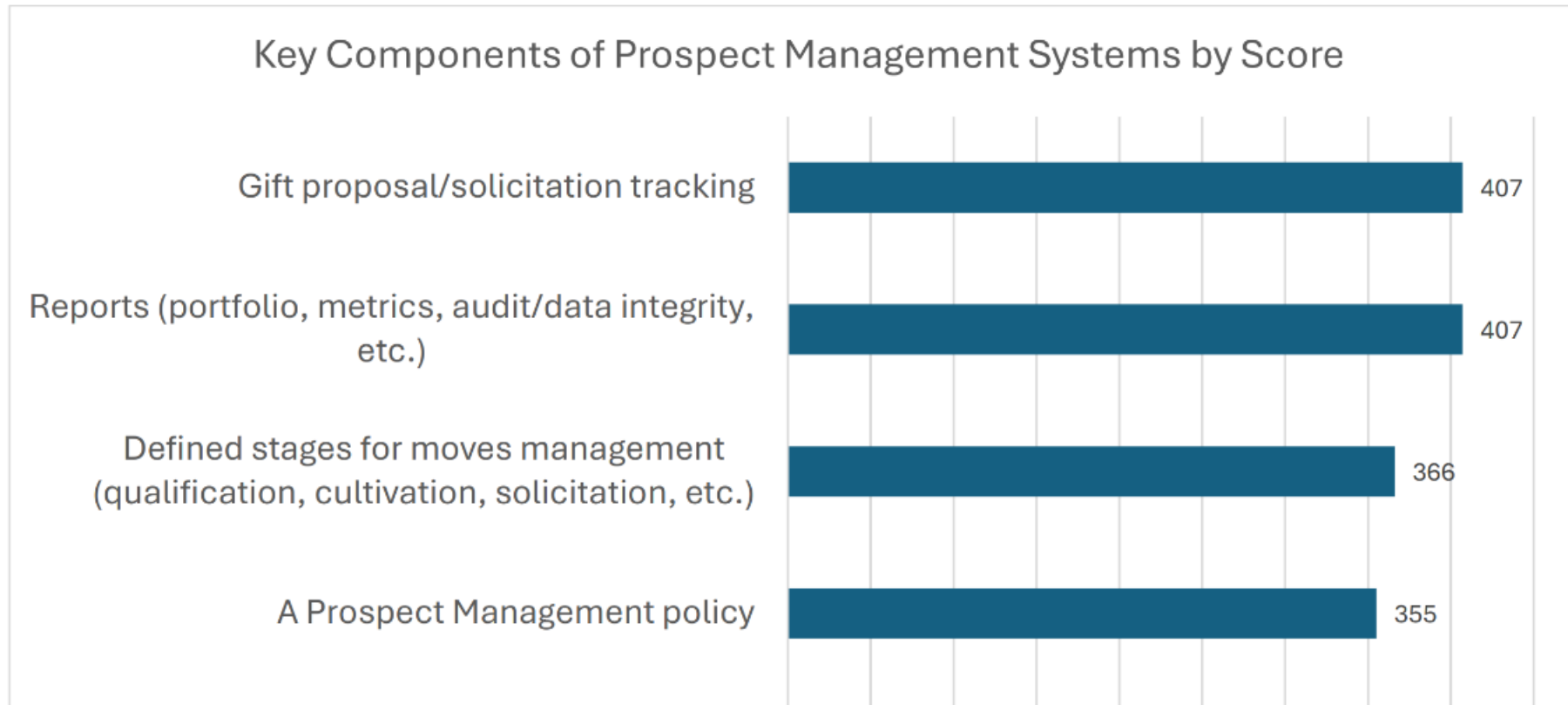
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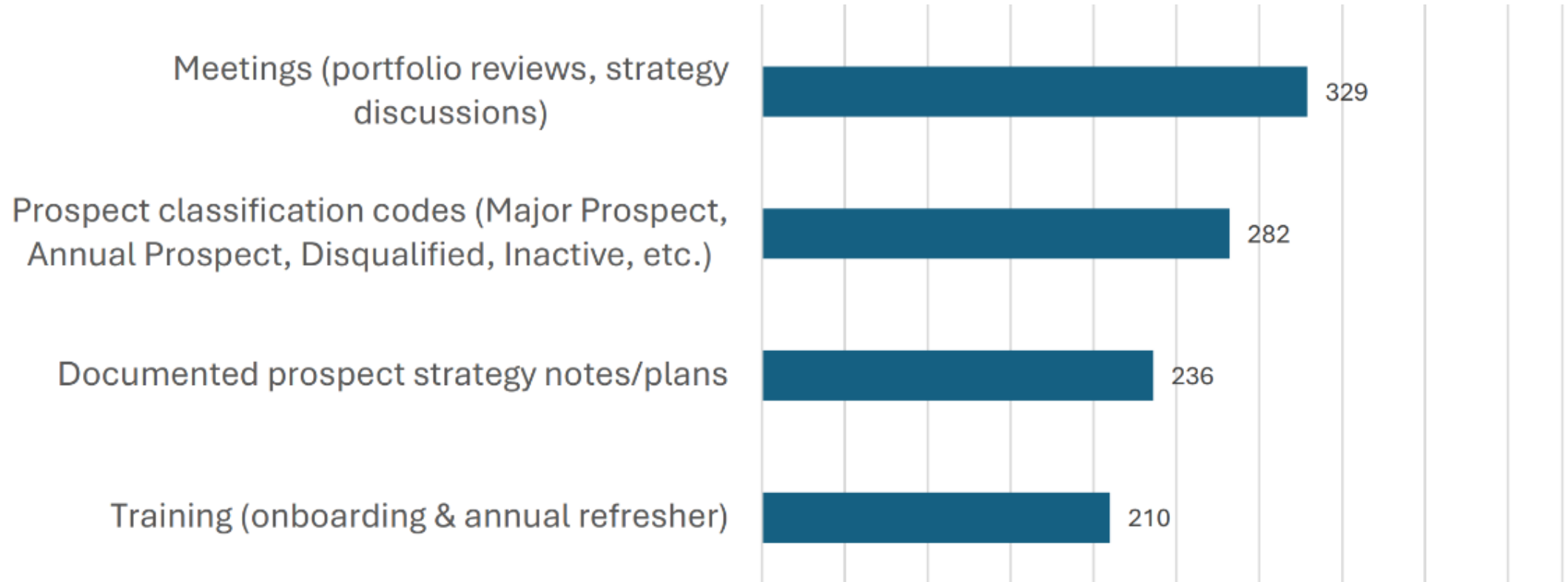
SURVEY SLIDES – KEY COMPONENTS

Rank the importance of the key components of the Prospect Management system in your organization.

Final Results by Weighted Ranking:

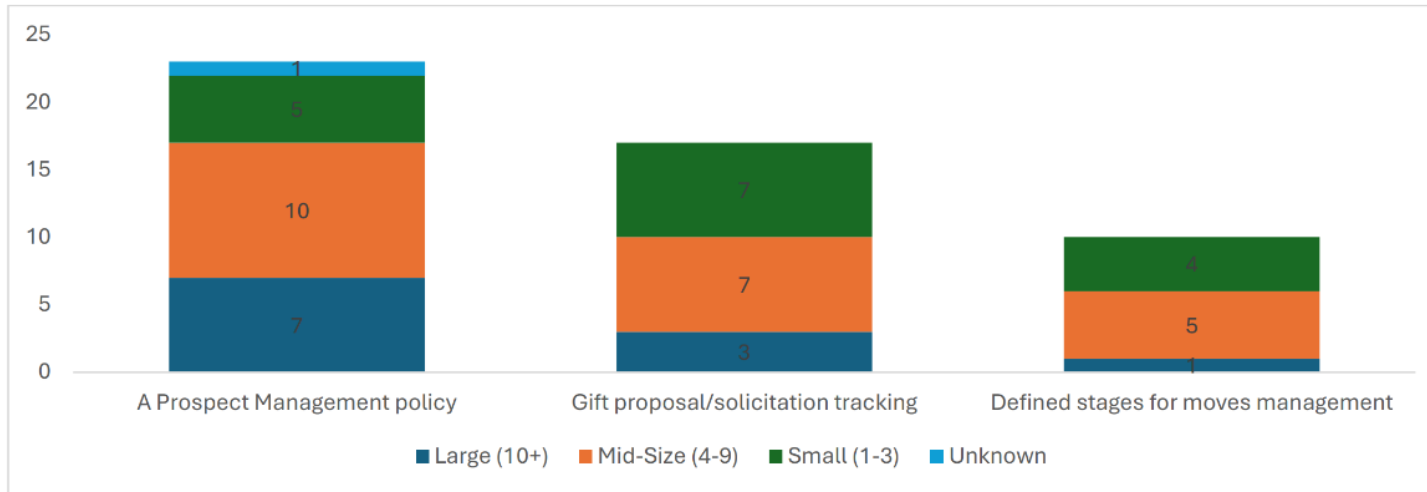


SURVEY SLIDES – KEY COMPONENTS



SURVEY SLIDES – KEY COMPONENTS

Question 1 detail: Most popular “First” responses (Top 3) by shop size

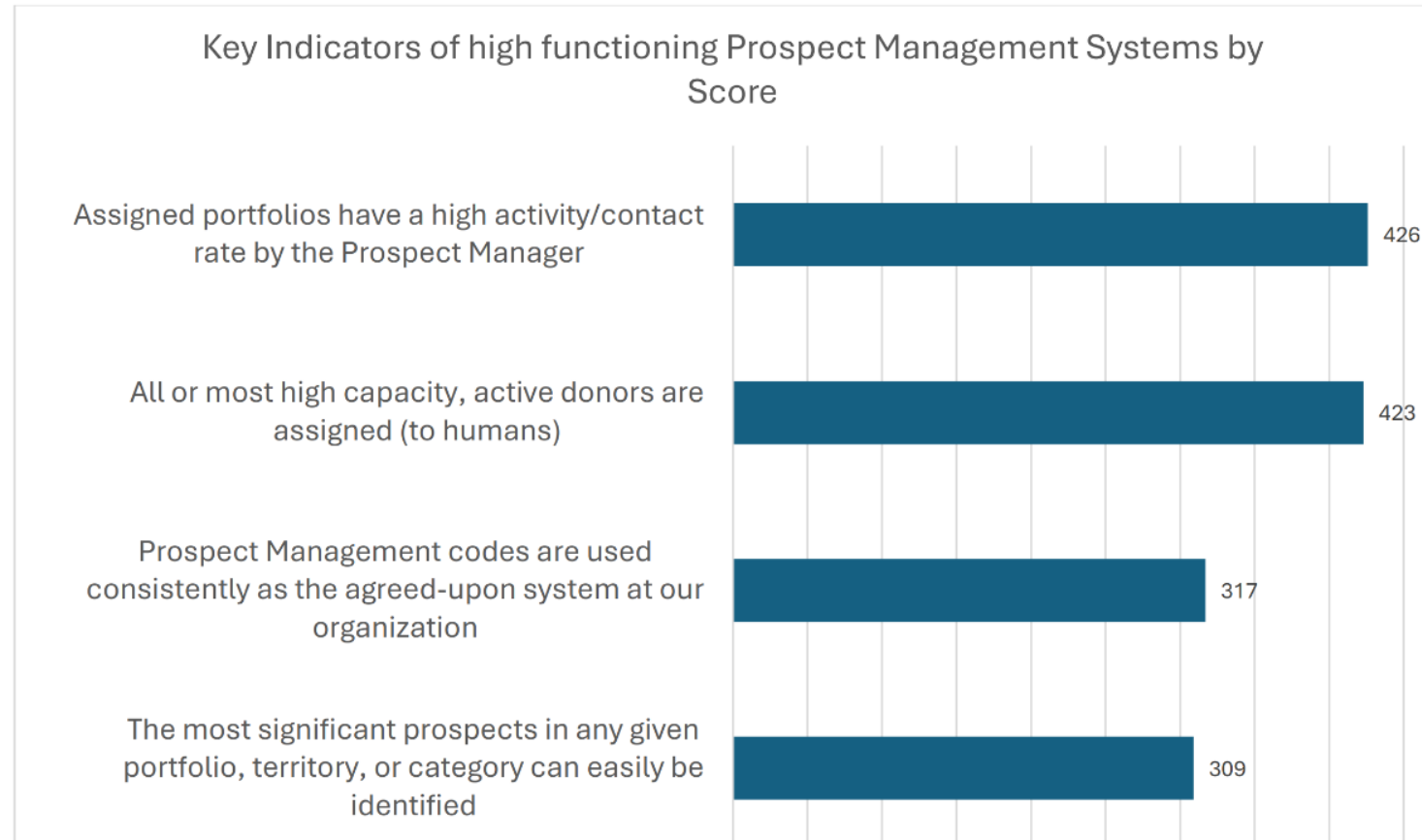


Selected Results:

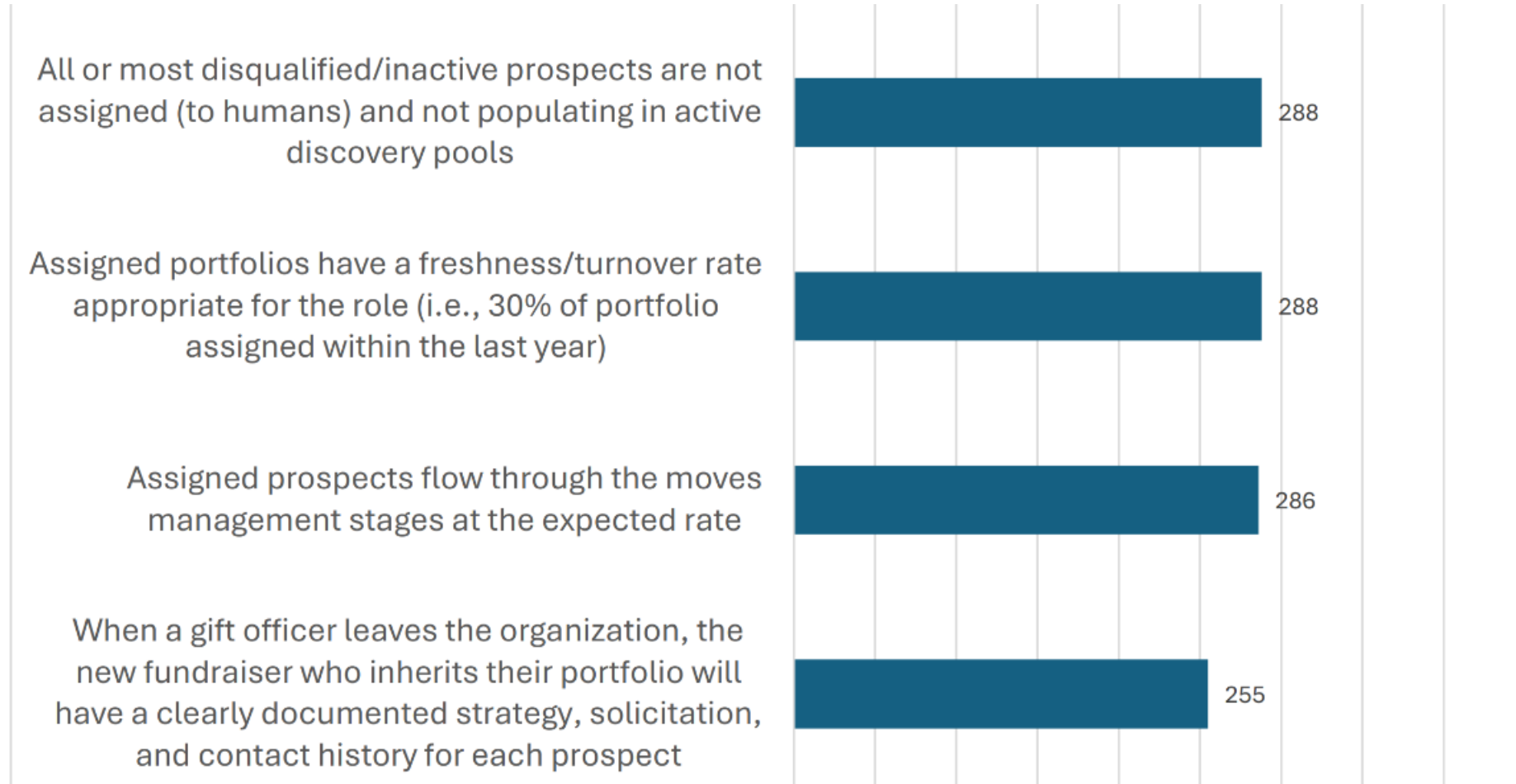
1. Leadership Buy-In
2. Culture of Accountability, Communication & Collaboration
3. Annual Assessment of Program
4. Automation
5. Data Entry & Data Hygiene

SURVEY SLIDES – KEY INDICATORS

Rank the key indicators of a high-functioning Prospect Management system.

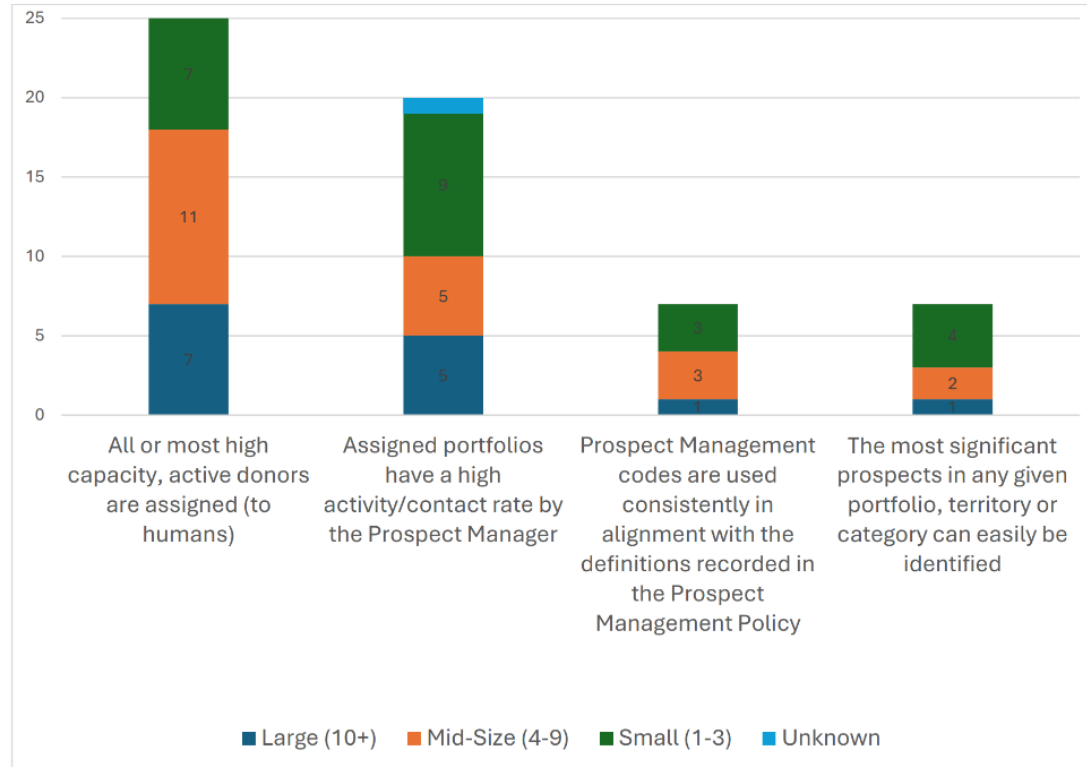


SURVEY SLIDES – KEY INDICATORS



SURVEY SLIDES – KEY INDICATORS

Question 3 detail: Most popular “First” responses (Top 3)



Selected Results:

1. Robust relationship between gift officers and Prospect Management staff
2. Accurate revenue forecasts
3. Data-driven decision making
4. Metrics system that inspires gift officers



Photo courtesy of Yale University, Jack Devlin

SPRING 2024

Existing – but usage variable by team

- Prospect Management Policies created in 2018
- Gift proposal/solicitation tracking
- Training & Reports largely on a team-by-team basis
- Stages for moves management
- Prospect Strategy meetings
- Documented prospect strategy notes/plans
- Holding pool system for discovery and disqualification

Absent

- Prospect status or classification codes (Major Prospect, Annual Prospect, Disqualified, Inactive, etc.)



ACTION PLAN

- Update prospect management policy
 - Clarify expectations
 - Implement prospect status codes
 - Simplify moves management stages
 - Retire holding pools
- Reinstate biannual portfolio reviews
- Develop consistent prospect management reports/dashboards for use across teams
- Develop training & audit reports



EXPECT THE UNEXPECTED

- Staffing
- Data integrity
- 377 research requests
- 120+ Key Stakeholders
- Operational differences between teams
- Database Nuances
- Reporting
- Shifting Headwinds

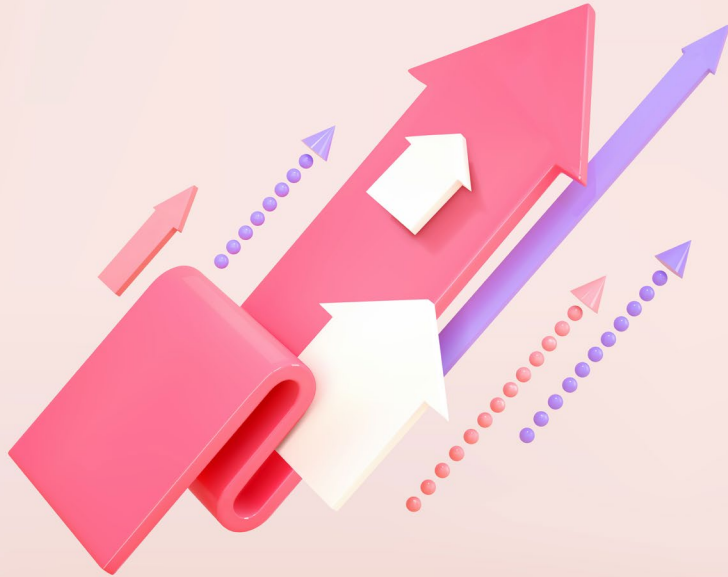
ONE YEAR IN...

- New policy effective 7/1/2025
- New training efforts
- New reports/processes:
 - Donor & event reports
 - DQ pool review
 - PM change audit
- Portfolio consultations



MEASURES OF SUCCESS

- **20% increase** in new assignments within Central associated with an active or successful solicitation
- **25% increase** in Prospect Management account activity
- **52% increase** in new assignments within the Central Major Gifts team
- **104% increase** in research-driven Central assignments associated with an active or successful solicitation



NAVIGATING CHANGE

- Focus on impact; choose selectively!
- Communicate the why
- Consider your timing
- Key experts to engage:
 - Leadership ally
 - Advancement systems/database management
 - Organizational knowledge
 - Operational managers within teams
- Use a change framework like Six Sources of Influence



EXCEL TIPS!

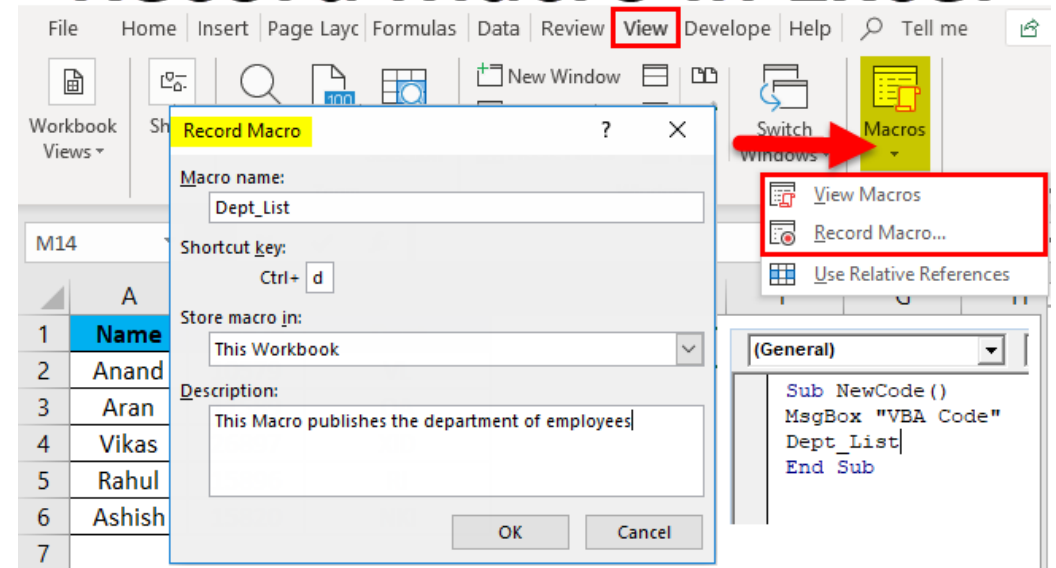
Tip #1: Utilize Excel Macros

What is a Macro?

A set of programming instructions that automate repetitive tasks or complex calculations within Microsoft Excel. These macros can either be written in a programming language called Visual Basic for Applications (VBA) or they can be recorded while performing the actions you want the macro to replicate.

Once a macro is recorded, you can edit its VBA code to fine-tune its functionality or add additional commands. However, this does require some knowledge of VBA programming.

Record Macro in Excel



EXCEL TIPS!

Tip #2: Create a Standardized Report

Basic Formatting Template:

Identify the key fields in your database for your standard export. (Ex: Total giving, Prospect Manager name, Engagement score, Last research date)

Standardize these fields into a consistent report download that generates the same columns in the same order each time.

Develop your macro using this standardized report format.

Save your template for future use, ensuring consistency and efficiency in future exports.



EXCEL TIPS!

Tip #3: Customize your Standard Report to Fit your Needs

Portfolio Consultation Template:

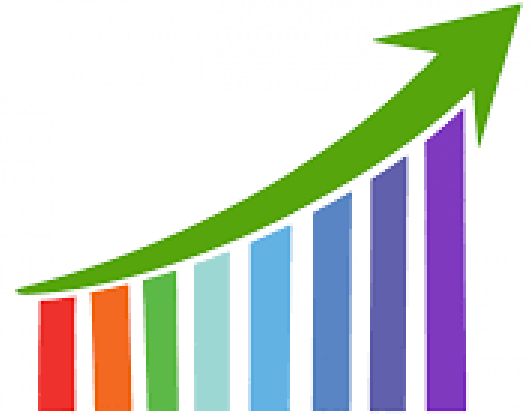
1. Identify the data you wish to emphasize beyond the basic formatting template. For example, this could include a detailed analysis of Activity data, open Opportunities, outstanding pledges, fundraiser goals, and more.
2. Expand upon your basic formatting template, incorporating this additional data for a richer, more comprehensive report.
3. Utilize PivotTables and other Excel data visualization tools to gain deeper insights and present your data effectively.
4. Save your enhanced template for future use, ensuring consistency and ease of access.

[Portfolio Consultation Example](#)

EXCEL TIPS!

Benefits of using Macros

- **Time-saving:** Automate repetitive tasks to significantly reduce the time required for completion.
- **Consistent and Accurate Data:** Ensure processes for data manipulation are performed consistently and accurately every time. This allows the standardization of the product produced by your Prospect Management Team.
- **Customization:** Tailor macros to perform specific tasks unique to your needs. Build new processes utilizing your established Macro for enhanced prospect management data analysis for portfolio consultations, event RSVP lists, disqualification lists, assignment recommendations, and more!



OUR CHALLENGES

“After the retirements of two long-time leaders, we are going through a process of needing to qualify or disqualify prospects who may have already been disqualified but there's no record of it.”

“Fundraisers do not act on prospects, assigned or otherwise. There are no consequences for not doing so”



OUR VICTORIES



“The best part of this work is creating a portfolio of prospects for someone who walks into the job and is completely overwhelmed. When you do a good job of building a prospect portfolio, you also help that fundraiser prioritize their major gift work, and you can practically see their blood pressure lowering.”

“The opportunity to tackle complex challenges from multiple perspectives. It combines strategic process and policy creation, data analytics, change management, and an understanding of what motivates different stakeholders. I appreciate how the role balances analytical thinking with human connection, allowing me to use a variety of skills to support both our teams and organizational goals.”

ADDITIONAL RESOURCES

- Best Practices in Executive Portfolio Reviews in Prospect Development
- Survey results
- Portfolio Consultation Example



Q&A

let's connect!



Email: mikhaila.eller@yale.edu

[LinkedIn](#)



Email: e.kahn@yale.edu

[LinkedIn](#)



THANK YOU!

Please complete your session
evaluations in the mobile app.

