

## Corporate Prospect Briefing Template

<b>Prepared by:</b>	<b>Date:</b>
<b>Company Information:</b> Name and Address	<b>Category:</b> Manufacturing/Financial etc.  <b>Why on List:</b> If there is a specific reason? I.e.: board recommendation, met at conference.
<b>Company Social Information:</b> Website link, Twitter handle, and Facebook page.  Facebook:  Twitter:  LinkedIn:  Instagram:  YouTube:	<b>Key Contacts:</b> Put in CEO AND the most senior marketing person or most senior Corporate Social Responsibility person. Find on their website or on LinkedIn.
<b>Company Overview:</b> 2-3 sentences about who the company is and what the company does. This should not be long or copied from the website, please summarize.	<b>Relationship Overview:</b> Provide background on the relationship. Previous giving, how you met, etc. If no relationship, then clear reasoning for why they are on the list.
<b>Community Investment Objectives:</b> This will most often be on their website. It could be "Charities we Support", "Charities we Sponsor", "Donations we Make", "Social Impact Objectives", etc.  <b>Stated area of interest:</b> Usually a sentence that says "we support education, or communities where we live and work". If you can't find it, look in the Media/Press Release section for recent gifts or sponsorships.	<b>Business Objectives:</b> Here are a few examples... <ul style="list-style-type: none"> <li>● Primarily Business to business company.</li> <li>● Grow market share in B2B.</li> <li>● Be seen as an excellent place to work.</li> <li>● Build long-lasting customer relationships</li> <li>● Grow global wealth and asset management businesses</li> <li>● Priority on diversity and inclusion</li> </ul>

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<p><b>Charity Partners and Causes:</b></p> <p>Might be a list of several charities that they are involved with. Review the website for press releases, recruitment of new employees, community investments, annual reports, etc. to seek this information.</p>	<p><b>Important Articles or References:</b></p> <p>While looking for the community investment information, include links to any tweets, press releases or articles that you find on this topic.</p> <p>This can be discovered through a google search and checking out their company Twitter, including the CEO's profile. Could include things like: new CEO appointment, lay offs, awards won – (best place to work, tech company of the year).</p>
<p><b>Target Audience:</b></p> <p>Describe their customer. If they sell business to business describe the business community they sell to.</p>	<p><b>Brand Risk:</b></p> <p>Is there a reason that there is a risk to your brand?</p>
<p><b>Issue They Need to Address:</b></p> <p>Could be: high turnover, large recruiting initiatives, launching of a new product, a highly competitive sector, wanting to be a leader in the community, or have had recent bad press.</p>	<p><b>Key to Mention:</b></p> <p>If you proceed, what should you address in this meeting? It could be the reason for alignment, or something interesting you've found in your research that could help support working together.</p>
<p><b>Assessment:</b></p> <p>This is very short. Highlight any key elements and if it is go forward or not. THIS IS NOT A STRATEGY! It can have high-level next steps for purposes of further discussion.</p> <p>The key purpose of all information about this point is to identify:</p> <ol style="list-style-type: none"> <li>1. A conversation starter</li> <li>2. Alignment between your charity and the company</li> <li>3. Possible relationship connections or door openers</li> </ol> <p>If you get the meeting you can do more, this is enough to get started.</p>	
<p><b>Key Consideration:</b></p> <p>Opportunity to highlight any issue or key consideration.</p>	