

Corporate Prospect Briefing Template

Prepared by:	Date:
Company Information: Name and Address	Category: Manufacturing/Financial etc. Why on List: If there is a specific reason? I.e.: board recommendation, met at conference.
Company Social Information: Website link, Twitter handle, and Facebook page. Facebook: Twitter: LinkedIn: Instagram: YouTube:	Key Contacts: Put in CEO AND the most senior marketing person or most senior Corporate Social Responsibility person. Find on their website or on LinkedIn.
Company Overview: 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.	Relationship Overview: Provide background on the relationship. Previous giving, how you met, etc. If no relationship, then clear reasoning for why they are on the list.
Community Investment Objectives: This will most often be on their website. It could be “Charities we Support”, “Charities we Sponsor”, “Donations we Make”, “Social Impact Objectives”, etc. Stated area of interest: 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.	Business Objectives: Here are a few examples... <ul style="list-style-type: none"> ● Primarily Business to business company. ● Grow market share in B2B. ● Be seen as an excellent place to work. ● Build long-lasting customer relationships ● Grow global wealth and asset management businesses ● Priority on diversity and inclusion

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<p>Charity Partners and Causes: 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>Important Articles or References: 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>Target Audience: Describe their customer. If they sell business to business describe the business community they sell to.</p>	<p>Brand Risk: Is there a reason that there is a risk to your brand?</p>
<p>Issue They Need to Address: 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>Key to Mention: 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>Assessment: 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"> 1. A conversation starter 2. Alignment between your charity and the company 3. Possible relationship connections or door openers <p>If you get the meeting you can do more, this is enough to get started.</p>	
<p>Key Consideration: Opportunity to highlight any issue or key consideration.</p>	