



# Digging for Gems: Using portfolio reviews and research to get to the YES!

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# Welcome to the Mine

- Finding the Portfolio Balance
- Doing your homework with Prospect Research
- Working Smarter to avoid Paralysis by Analysis



# Pyrite or 24k?

- Types of Reviews
- Suspects vs. Prospects
- LAI
- Qualifying and Prioritizing
- Samples: Prospect Profiles & Rating Systems



# Discussion #1

- What has your role been in the research and evaluating process?



# Reflection #1

- Think of ONE suspect and what additional information do you need about them to know if they are qualified or not





# More Carats is not always better

- Quarterly Reviews: the **who** and the **how**
- Moving up **and** down...and OUT
- Keeping it organized
- The intertied jewel (portfolio)
- Sample: Top 10 Account Plans



## Discussion #2

- Who do you involve in your portfolio reviews?



## Reflection #2

- What is one new thing that you'll try in your next review





# Color, Cut, Clarity

- Moving to Monthly (or recurring)
- Midlevel to Major
- Hidden gems: Planned Giving
- Gold mine! (Giving assets)
- Power of: Asking...Engaging...Inviting...Thanking
- Samples: Surveys and Giving Level Invitation



## Discussion #3

- What indicators have you found to be especially indicative at your organization?



## Reflection #3

- What one area will you focus on first?



# Put a bow on it

- Understanding donor motives
- Listening to the donor
- Value of research experts
- Get out of the data and out with people!



# Questions?





# Thank you!

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