



FIA Conference 2023

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How to make your prospect engagement events engaging

MIDDLE, MAJOR & PHILANTHROPY

Brian Holmes FFIA & Antonia Makkar MFIA
Xponential & Baker Heart & Diabetes Institute

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Acknowledgement of country

In the spirit of reconciliation, we would like to acknowledge the Traditional Custodians of country we are presenting on today.

We pay our respect to their elders-past, present and future and extend that respect to all Aboriginal and Torres Strait Islander peoples here today.

You are invited...

Dear 'Insert Name Here'

You are invited to come and hear all about the wonderful work we are doing....

Time: 3.00pm

Place: Our Organisation

Please RSVP to fundraising@nfporg.org.au

How many of you would attend?

You are invited...

Dear 'Insert Name Here'

Mr Geoffrey Rush would like to invite you to join him to hear about some exciting new plans...

Time: 3.00pm

Place: Our Organisation

Please RSVP to fundraising@nfporg.org.au

How many of you would attend?

Together, unlimited.

You are invited...

Dear 'Insert Name Here and Partner Name Here'

Mr Geoffrey Rush would like to invite you to his home to hear about some exciting new plans...

Time: 6.00pm - 7.30pm

Venue: The home of Geoffrey Rush

Please RSVP to antonia@nfporg.org.au

How many of you would attend?

Together, unlimited.

You are invited...

Dear 'Insert Name Here'

*Mr Geoffrey Rush would like to invite you to join him at his home to hear
about a new multi-level marketing opportunity.*

Time: 10.00am

Place: The home of Geoffrey Rush

Please RSVP to antonia@getrichquick.com

How many of you would attend?

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What, Who & Why

What is the purpose of a Prospect Engagement Event?

Who is the target for a Prospect Engagement Event?

Why should you consider Prospect Engagement Events?

Key Outcomes:

CREATIVITY – Getting the right people in the room

STRATEGY – Getting the outcomes that you want

Case Studies: Two Prospect Engagement Events that were integral to the Baker Heart & Diabetes Institute's \$100m 'YOU' campaign.

Fundamentals

Defining a Prospect Engagement Event:

- What is a 'Major' donor to you?
- What is the purpose of a Prospect Engagement Event?
- What are the benefits (Internal and External) of a Prospect Engagement Event?
- What are the challenges in implementing a Prospect Engagement Event?

The key drivers of a successful Prospect Engagement Event:

1. Interest
2. Uniqueness
3. Influence

Getting the Right People in the room

What is more important Quantity or Quality?

The challenges for every for every NFP prospect engagement event include:

1. How do you capture the invitees interest?
2. What will make your event stand out?
3. What will influence the invitee to attend?

Getting the Outcomes that You Want

You have attracted prospects to your event. What can you do to maximise prospect engagement and have them wanting to talk with you post event?

The three key areas to look at are:

1. The People
2. The Message
3. The Ask – how is it being done and by who?

Context for Case Studies

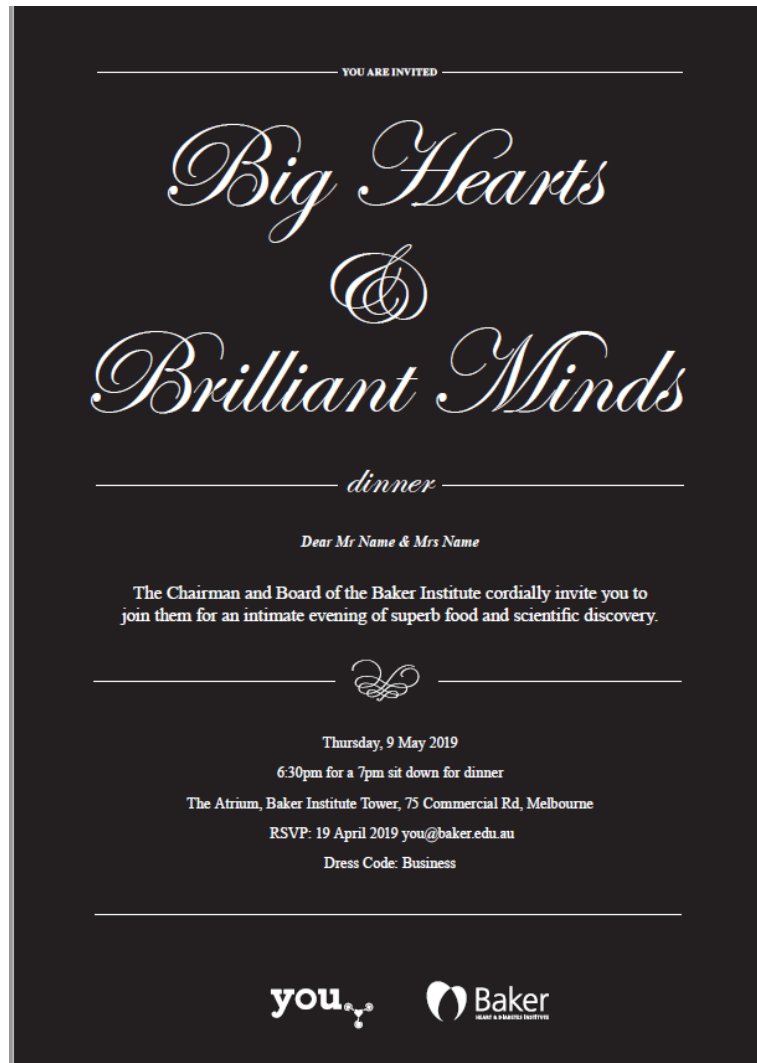
The reason for the prospect engagement events -

**A \$100M capacity campaign –
the *YOU* campaign.**


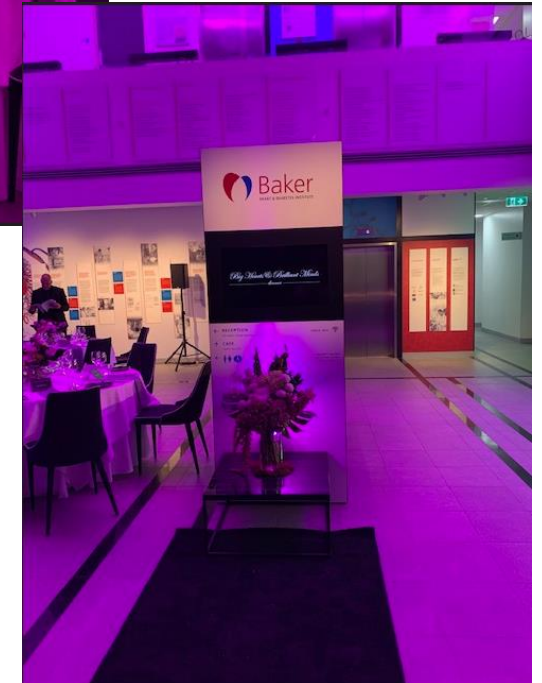
\$50M needed from philanthropy to increase capacity for the Baker with a focus on personalized medicine for heart disease and diabetes.



have the power to save lives





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This will be an evening for those with Big Hearts and Brilliant Minds in a unique setting within the Baker Heart and Diabetes Institute.

This is an opportunity to hear about the new era of scientific discovery – big data in a brave new world for medical research and what it means to you.

Two of the Baker Institutes's leading minds, Professor Tom Marwick and Professor Peter Meikle, will guide you through the journey of personalised medicine and the opportunities for those with Big Hearts and Brilliant Minds.

you  



Creativity

The creative input into your event has a major impact on the invitee's decision to attend:

1. What does the Invitation tell the invitee?
2. What does the Theme and wording tell the invitee?
3. What does the Venue tell the invitee?

Case Study 1: Big Hearts & Brilliant Minds

The challenges for Baker:

1. The need to expand the number of HNW / UHNW donors
2. Internal nervousness of new territory
3. The need to host at Baker
4. Connecting philanthropy with scientific research
5. Engaging the Board
6. Needed the time to have meaningful conversations

Case Study 1: Big Hearts & Brilliant Minds

The Event:

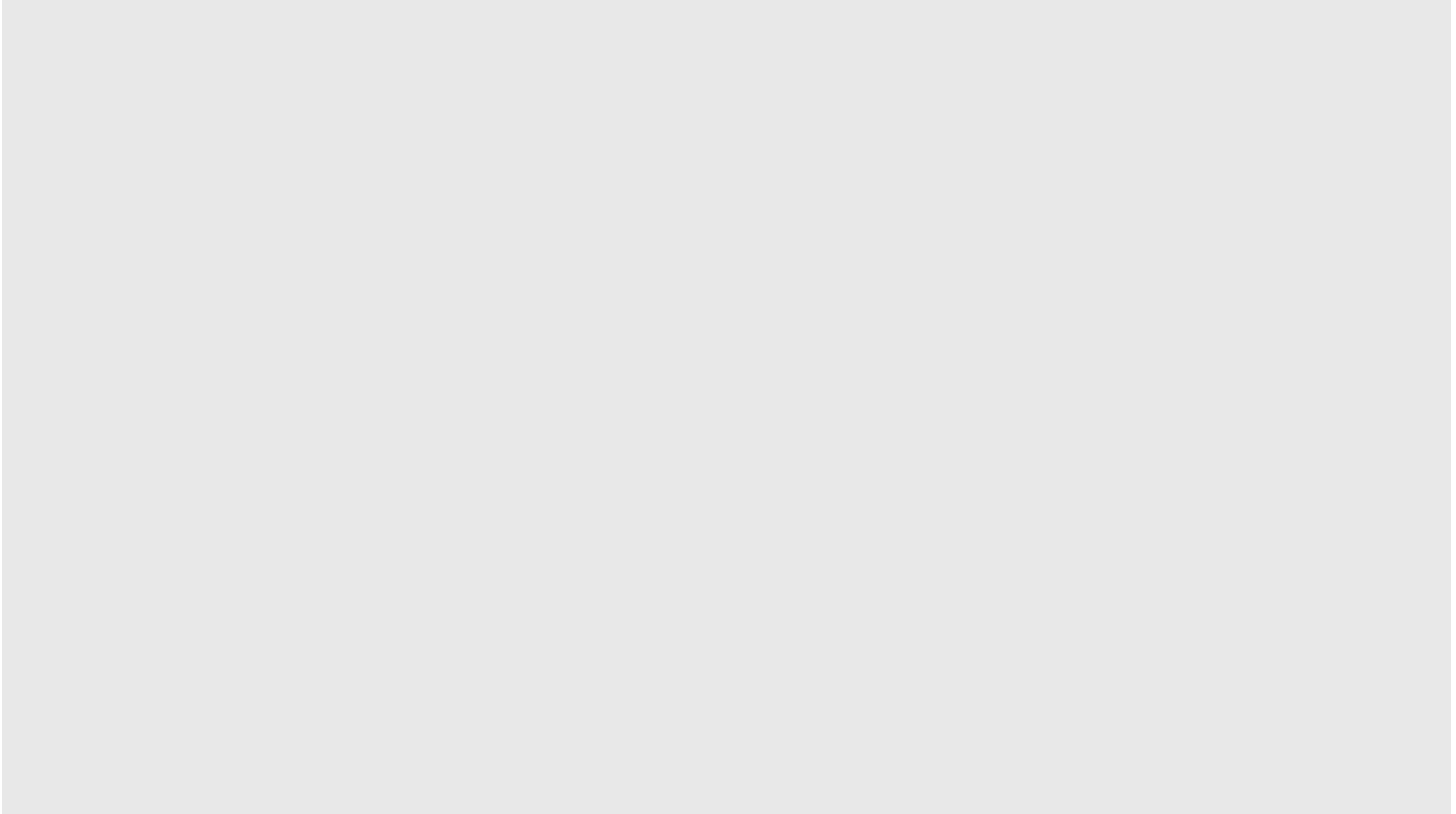
1. High quality invitation
2. Appeal to ego "Big Hearts"
3. Sparked interest through the "Brilliant Minds" tag
4. Turned the foyer into the event space
5. Made it a dinner to attract only 'interested' potential partners

Case Study 1: Big Hearts & Brilliant Minds

The importance of the run sheet:

1. Speakers / VIP guests
2. Goals
3. Key Messages
4. Desired outcome
5. Speaker 1 – Chairman
6. Speaker 2 – CEO
7. Speaker 3 – Rockstar Researchers!

Case Study 1: Big Hearts & Brilliant Minds



Case Study 1: Big Hearts & Brilliant Minds

The Results:

1. Response
2. \$ value of the room
3. Board engagement
4. Organisational executive confidence boost
5. New donors including....

A \$1 million donation from someone who had not previously given to the Baker

Case Study 2: Hearts of Gold

The context and the challenges for Baker:

1. It needed to be both a donor recognition and new prospect event
2. It needed to accommodate a larger number of guests
3. It needed to build on the success of the previous event
4. It needed to be an event that Board members and advocates were willing to invite their network to.
5. It needed a prestigious venue that would interest invitees
6. We still wanted to connect 'Hearts' but this time with 'the Gold'
7. Needed to navigate Covid restrictions



Hearts of Gold

The Baker Heart and Diabetes Institute invites you to an evening of superb food, interesting conversation and scientific discovery.

Join us for a bespoke dinner curated by international chef Matthew Butcher, and enjoy wines from our valued partner Casella Family Brands, in a unique Melbourne setting. You will be treated to a discussion headed by leading sports scientist and cardiologist Associate Professor Andre La Gerche, and a panel of his peers who will share with YOU how their research can benefit your heart and good health.

WHEN

Thursday 2 December 2021

TIME

6:30pm for pre-dinner drinks

WHERE

Rolls-Royce Motor Cars Melbourne
420 Swan Street, Richmond

RSVP

15 November 2021
events@baker.edu.au

DRESS CODE

Business

Invite

Baker.edu.au



Front



Entrée Card

Back



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Case Study 2: Hearts of Gold

The Event:

1. High quality invitation
2. A 'gold' level venue
3. Gold theme
4. Health messaging – Elite Athletes and YOU (What your fitbit doesn't tell you)
5. Campaign Progress Announcement
6. Board, Clinicians, Advocate and Donors Network Invitees
7. Next level prospects

Case Study 2: Hearts of Gold

The Results:

1. Response
2. \$ value of the room
3. Board, Clinician and Advocate engagement
4. Target vs post event result

.....

Summary

- As with all fundraising, you want to your Prospect Engagement Events must be 'DONORCENTRIC'
- Your event will speak to the ASK expectation from the moment the invitation is seen.
- Seek to offset "this must be costing you a fortune" with sponsorship or gift-in-kind.
- Work to a theme. What is the common 'highest' denominator?
- Be very clear about the outcomes you are seeking and how you will ensure messaging is on point on the evening.
-

QUESTIONS?

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Thank you

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