Developing client/funder intelligence (Tom)

Growing income	Task	Sub task	Staff lead	Staff team	Board lead	£	Timescales
MMP (Projects)	Enhance our Client/Funder database	Research software solution	SM		N/A	Free (Salesforce.org)	1 week
		Design and test	SM	DB		N/A	2 weeks
		Populate	SF	All			1 month
		Roll out/training	SM	All			1 week
MMP (Research funding)	Subscribe to funding databases e.g. fundsonline.org.uk	Explore value & signup	TG			£432	1 week
MMP (Core funding)	Scoping, researching and targeting philanthropic funders, previous and new, building into CRM	Web search	TG	JL, JB		N/A	1 week
		Map and detail	TG	JL, JB			2 weeks
		Engage	TG		All - where appropriate		3 months
Targeted geographies	Add a geographical focus to funders search	Web search	TG	JL, JB	N/A		1 week
		Map and detail	TG	JL, JB			2 weeks
		Engage	TG		All - where appropriate		3 months

We have developed a customised version of the Salesforce NonProfit Success Pack which has 10 free licenses. We will be rolling this out with staff training over the coming month.

We've mapped our existing funders into a single spreadsheet that we will be able to upload to Salesforce. This will provide information about potential funding deadlines. We subscribed to fundsonline.org.uk and have identified some new potential funders.

MMP (Projects)
We have now completed the intelligence gathering for this project, with a rationalisation of existing organisational objectives to identify those of relevance to communications strategy, extracting learnings from

the officer and leader network groups we have convened since March to establish our market needs, challenges and enablers and a survey to key stakeholders to establish CLES reputation in the market. Over the coming month we expect to complete this work by determining the communication objectives we want to work to, activity streams and KPIs. From this a content strategy should be developed and a separate marketing strategy for anchor institutions will follow.

MMP (CofX) and targeted geographies
These projects will begin development soon.