# High level Engagement Process | Large Corporate Donor

**Fund Raising Stage**

| Attract | Sell | Wow |
|---|---|---|

| Identify | Validate | Receive | Monitor |
|---|---|---|---|

**Donor Journey Stage**

Awareness & Research → Contact → Conversion → Conclusion & Support

**High Level Activity**

**Awareness & Research**

- Donor gains organic awareness of the fund through:
  - Social media and advertising
  - General media
  - SF partners, e.g. banking websites
  - SF Website
  - Word of mouth
- Donor conducts additional research on the fund

**Contact**

- Donor initiates contact via SF Website
  - Initiates contact via email address or call centre
  - Directly makes cash contribution through website
- KAM initiates contact with donor via direct calling
- Donor initiates contact with fund via personal relationship with fund representative
- KAM is allocated an account and manages account through provision of information, documents and process

**Conversion**

- SF Website
  - Fund admin team receives notification of funds received and initiates vetting process
- KAM
  - Regularly follows up with donor and responds to queries/ questions
  - Determines donation type – refer to relevant task force
  - Request/provides all required documents
  - Initiates vetting process with fund admin team

**Conclusion & Support**

- Fund admin team informs KAM of vetting results
- Payment is initiated by donor
- Funds are received - KAM notified by fund administration team
- KAM sends 'thank you' letter to donor KAM hands over details of donor to Comms team, includes donor onto stakeholder database for future newsletters and updates
- KAM maintains relationship with donor, responding to questions/ queries and further offers of support

**Content Required**

- Standardised social media and advertising content
- General media articles, press releases etc.
- Standardised partner messaging
- Updated website content, including FAQs

- Call centre FAQs
- Website FAQs
- Automatic email response template
- KAM referral email template
- KAM information pack
- Donor information pack
- Corporate donor database

- KAM information pack
- Donor information pack
- In-kind donation form
- Vetting document pack
- Vetting process email template
- Corporate donor database
- Vetting database

- Vetting database
- Corporate donor database
- Stakeholder comms database
- "Thank you" letter templates/video
- Newsletters/updates
- Donor list published on website
- Section 18A certificate

**Governance & Oversight**

- Regular call to track donor onboarding progress
- Vetting approvals/rejections
- Receiving proof of payment

DAY 0 → DAY 2 → DAY 4 → DAY 5