

Welcome

Maximizing Sponsorship Workshop
How to Leverage Partner Relationships



OPERATIONAL SUPPORT

MEMBER SERVICES

REVENUE GENERATION

Funders, Donors, Sponsors

Funders

- Partnering to deliver a program

The case: Ability to deliver the program

Donors

- Funding a cause they believe in

The case: Service/value provided by organization

Sponsors

- Brand alignment
- Product/service message to buyers or influencers

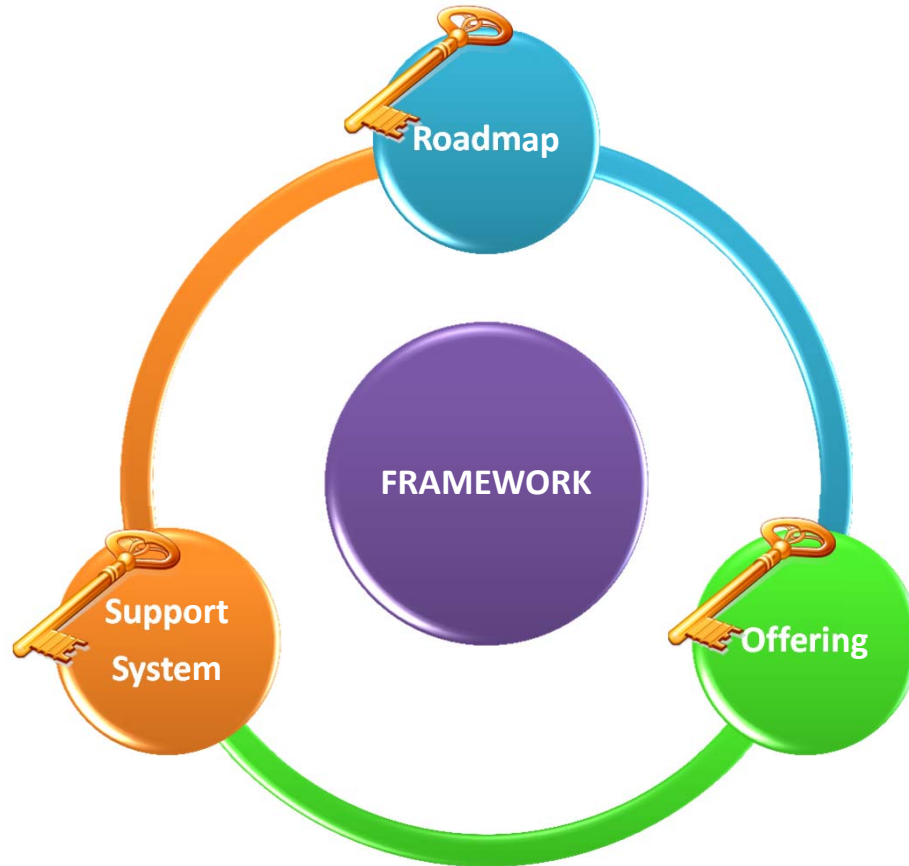
The case: Bottom line ROI

Sponsorship Framework– 3 Keys

Turnkey Program...

- Sponsorship Roadmap & Action Plan
- Sponsorship Offering
- Sponsorship Program Support System

Sponsorship Framework– 3 Keys



Workbook

- Roadmap and Action Plan
- Value Proposition Scorecard
 - Step 1: Member/Client
 - Step 2: Decision Profile
 - Step 3: Organization Profile
 - Step 4: Contact Profile

Roadmap

WHERE ARE WE NOW?	WHERE DO WE WANT TO GO?	
SPONSORS	Now	FUTURE
Number of Sponsors	3	10
\$ Value of Sponsorship	\$25,000	\$100,000

Value Proposition Scorecard

VALUE PROPOSITION SCORECARD		
METRIC	POSSIBLE SCORE	TOTAL
Organization Profile	4	3 ✓
Contact Profile	4	2 ✓
Decision Profile-Members	4	4
Decision Profile-Clients	4	4

POSSIBLE SPONSORS
PROSPECTS
RBC
HSBC
National

Step 1: Value Proposition – Member/Client

Number of Members: 100

Size of Mailing List: 200

MEMBER & CLIENT DESCRIPTION	
MEMBER PROFILE	<p>Canadian research analysts</p> <ul style="list-style-type: none">□ Typically 5-15 years experience, 30-45 years old□ Majority have CFA designation□ 60% work on the buy side
CLIENT PROFILE:	<ol style="list-style-type: none">1. Portfolio managers—mutual, public sector, private2. Security traders3. Corporate finance professionals<ol style="list-style-type: none">a. 80% financial institutionsb. 20% exchange-listed corporate

Step 2: Decision Profile

DECISION PROFILE	
MEMBERS	CLIENTS
1 Analytical software purchases	Stock purchases and sales
2 Database software purchases	Analytical report services
3 Computer hardware purchases	
4 Data service purchasers	
5 Data storage and back-up service purchases	
6 Data security purchases	
7 Analytical report services	
8 Publishing software purchases	
9 Delivery services	

Step 3: Organization Profile

ORGANIZATION PROFILE	
AGE OF ORGANIZATION	10 years
PRESS ACTIVITY:	Frequent Infrequent Never
# OF COMPETITORS:	2
CERTIFICATION GRANTOR?	Yes No
CERTIFICATION ROLE?	None Low Medium High
BRAND RECOGNITION WITHIN SECTOR	Low Medium High
BRAND CREDIBILITY WITHIN SECTOR	Low Medium High

Step 4: Contact Profile

CONTACT PROFILE	
EVENTS	COMMUNICATIONS
1 Spring conference	Quarterly newsletter
2 Summer BBQ	Annual membership renewal invoice
3 Awards gala	
4 AGM	
Contact Frequency per annum: 9	

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7 Tips

- External event planners
- Don't charge for costs-charge for value
- Year-round vs. Event-specific
- Budget season – know FY
- Sponsors, not members
- Collect cheques first
- System

Action Plan

ACTION PLAN		
WHAT?	WHO?	WHEN?
Complete value proposition	Me	
Complete list of target sponsors		
Make improvements to weak areas of scorecard where possible		
Prepare Sponsorship Offering Proposal		
Prepare Sponsorship Policies		
Prepare Marketing Execution System		

Join me at the CSAE Trillium Summer Summit

July 12-13 in Collingwood - I'm talking about:

“ Downsizing and Enhancing Member Value: Strategies for Small Associations ”



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