



"Our goal is to help our clients build and maintain long-lasting donor relationships. Working with prospect research firms we push our technology to new levels and link important development functions. By automating prospect research, we enable development staff to efficiently spend their valuable time identifying major donors and cultivating large gifts."

Susan Packard Orr, President and CEO, Telosa Software

## Prospect Research Module

### Prospect Research

Have you been thinking about a major donor or capital campaign? Do you need help identifying your most promising prospects? Telosa's new prospect research module provides you with a simple solution for access to comprehensive and powerful information about your constituents.

### Benefits of using Exceed! Premier's Prospect Research Module

- From your Exceed! Premier database, you can use the Prospect Research module to conduct prospect research and integrate the results directly into the appropriate fields in Exceed! Premier. This includes data on donors and prospects.
- Our Prospect Research module allows you to screen top sources of public data—including real estate, philanthropy, stock ownership and hard assets.
- It also provides a unique rating system to assist with targeting and segmenting for major gifts, planned giving, and annual fund campaigns and points you to the most promising prospects for your specific fundraising goals.
- The Exceed! Premier Prospect Research module provides you with quick links to your VIPs and adjustable giving capacity rating and scoring.
- The module also allows you to query, report and export all data provided by our partners within Exceed! Premier.

### Sample Report

Your Organization Name NEXT STEP REPORT			
<b>Rating:</b> 4 - \$250,000 - \$499,999			
<b>Step:</b> Last gift was more than a year ago. Ask again this year to give at least as much as last year.			
<b>Chris Bancroft and Terry Bancroft-Sanders</b>	<u>Last Gift</u> 08/08/2005	20.00	<u>Last Completed Action</u> 08/09/2007
<b>Rating:</b> 6 - \$50,000 - \$99,999			
<b>Step:</b> No actions recorded. Needs a solicitor assigned and a plan to build the relationship.			
<b>Fred and Cindy McDonald</b>	<u>Last Gift</u> / /	0.00	<u>Last Completed Action</u> / /
<b>Rating:</b> B - \$2,5000 - \$4,999			
<b>Step:</b> Current donor. Stay in touch and consider upgrading next year to a higher giving level.			
<b>Mr. John Franklin and Theresa Morales-Franklin</b>	<u>Last Gift</u> 01/23/2008	1,000.00	<u>Last Completed Action</u> / /

The Next Step report suggests a next step for each prospect or donor based on their Giving Capacity Rating or Direct Marketing Rating in combination with their Exceed! Premier giving and action history.



A Team of  
Trusted Advisors.  
Not an Army of Salespeople.



## Available Services

### Wealth Screening Services

Screen all or just a portion of your Exceed! Premier database against our partner's wealth screening data services. This data analysis applies statistical models to calculate ratings and scoring on giving capacity, influence, inclination, direct marketing, and planned giving for each matched record. Summary information can be easily imported back into your Exceed! database for further reporting and filtering. The result is clear, comprehensive information that you can take from desktop to donor meeting.

### Web Research

A web-based research tool with immediate results on individuals, nonprofits, foundations, and companies. With each look-up, all the source databases are scanned for the latest information and then compiled. You access the most current data on valuable hard asset information like real estate, pension, and income, as well as philanthropic and biographical data.

### Additional WebService Options\*:

**WebConnect**--This provides a WealthEngine lookup button directly from within Exceed! This one-click access to the WebService Research Center puts up-to-the-minute detailed wealth information at your fingertips.

**Pinpoint**- This add-on service provides proprietary stock information and a news alert service.

The screenshot shows a software window titled "The Household of Stanley Martina and Jessica Lewis-Martina" with ID# 5. It displays a detailed wealth screening report. Key sections include:

- People:** Stanley Martina and Jessica Lewis-Martina, Ms. Jessica Lewis-Martina, Mr. Jim James, PhD, Joe Cooper.
- Addresses:** 4587 Main Street, San Francisco CA 94118.
- Phones:** 345-876-7868 (Home).
- Financial Data:**
  - Giving Capacity Rating: 2 (\$1,000,000-\$4,999,999)
  - Propensity to Give Rating: 1-0
  - Stock: 9,800,500.00
  - FEC Contribution: 6,000.00
  - Income (MG): 435,000.00
  - Asset Value (DB): 11,655,900.00
  - Real Estate: 2,450,000.00
  - Income Used: 435,000.00
- Quality of Match:**
  - Stock: 2
  - FEC Contribution: 4
  - Income (MG): 3
  - Asset Value (DB): 3
- Other Metrics:**
  - GuideStar Non Profit Director: 2
  - GuideStar Foundation Trustee: 1
  - Real Estate Count: 3
  - Date of Last Screening Update: 09/18/2008

Unique Ratings Information helps you identify the most promising donors and prospects.

Contact us for a **FREE DEMO CD**  
Visit us at:  
[www.telosa.com](http://www.telosa.com)  
or call 800.676.5831  
to get started.

### Contact Us Today

Whether you're an existing or a new client, you can purchase any of the above services through Telosa. Call or e-mail Telosa today and we'll show you how Exceed! can empower you to spend more time in front of your donors, and less time in front of your computer.



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## Empowering Nonprofits to Focus on Their Missions for Over 20 Years

\*Additional WebService options only available through WealthEngine.