




INFORMATION MANAGEMENT PROFESSIONALS

Building a Prospect List




Presented by:
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Fresh Ideas

- Consider the development of a prospect list similar to sales – we are marketing our Chapter
- Be concise in the message your chapter is delivering (know your mission statement)
- Attend other related organization events, network and market the chapter to attendees you meet there
- Cross promote at similar events (for example, InfoGovCon)
- Cross promote to SLA, ILTA, ART and other similar organizations





Fresh Ideas

- Membership table and marketing at our Annual Conference
- Utilize business cards (especially from President, Membership and Sponsorship Board members)
- Work with professors at the local Information Management Schools – student outreach
- Reach out to other programs, such as Columbia University’s Information and Knowledge Strategy Master of Science



Fresh Ideas

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4 Point Plan to Building a Prospect List

1. Identify Your Target Members
2. Obtain Past Member Data
3. Verify and Build Out Member Data
4. Identify Prospective Members

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1. Identify Your Target Members

- Who do you specifically want to target?
- Begin by looking at current members at the local and international levels as well as guests/non-members
- Breakdown your search into three focus areas – *Industry, Event and Location*
- Create a strategy for each focus area

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Industry Focus

- Review current membership database and identify industries with greatest or least members
 - Example #1: If legal has greatest number of members and you want greater diversification of membership, eliminate or minimize outreach efforts to legal industry
 - Example #2: If legal membership has been in decline the most over past two years, focus on outreach to legal industry only


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Event Focus



- Review attendance for a period of 12-18 months with a specific focus on new and repeat guests/non-members. Categorize events separately as follows:
 - Evening meetings
 - Lunch meetings
 - Networking events
 - Annual Conference

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Location Focus

- Review Monthly 099 Region Roster
 - Establish boundary map based on distance to local chapter
 - Consider location of regional chapters and cross promoting membership
 - Consider length of membership



2. Obtain Past Member Data

- Review your membership database – one of your greatest resources
- At a minimum obtain first name, last name, join date, job title, industry, address, city, state, email, telephone
- Presort and dedupe information
- Capture what events and meetings topics they have attended





3. Verify and Buildout Member Data

- Identify gaps or incorrect information by researching each contact
- Use search engines and social networks as additional resources


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4. New Prospective Members



- Members and Sponsors (vendors) are likely to refer others who are similar to them and interested in what the chapter has to offer
- Analyze prospects on LinkedIn – ARMA Metro NYC Group page

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Best Practices

- Save prospect list and different versions to a shared location (such as OneDrive)
- Update prospect list on a biannual basis



Questions?

