**SVP Outreach Stewards—Process**

The Steward is a key role in the Outreach process. Through ongoing communication, stewards develop and nurture SVP’s relationship with prospective partners. You will reflect and represent SVP’s values. Stewards are partners who have been deeply involved with SVP and who have committed to a long-term relationship with prospects.

We know this is a big commitment and are extremely grateful to you for stepping up. We have tried to make it as easy as possible. We have template emails and after the first few communications, staff will send you a monthly reminder letting you know who you need to contact and what stage they are in.

Believing in continuous improvement, please give us feedback on how we can make this process better.

# Role

* Attend one to three Prospect Partner Receptions per year. Be prepared to share your story at the reception.
* Commit to be primary contact with attendees/no shows following Prospective Partner Receptions to answer additional questions and keep SVP top of mind.
* Follow the process below and customize the outreach (email, phone, etc.) based on what we know about the individual prospect, in order to stay in contact with people who have shown an interest in SVP. Templates are provided for email communications.
* Ensure notes and important follow-up dates are communicated with SVP Staff to maintain proper/accurate record keeping.

# Process

* Please refer to the document SVP Outreach – Steward Email Templates.
* Customize these emails.
* When you BCC Megan, leave clues for when you will next follow up so she knows when to send you a reminder.
* Don’t use Best or All the Best as your closing – this is a clue to Megan to quit reminding you about the prospect. Use Hope you are well or Cheers or something else.

## Timing: Immediately Following the Reception

* That night or the next day - send either Template #1 Email for Attendees or Template #2 Email for No Shows.
* CC Partners known to be connected to the prospect (e.g. the partner who invited him/her to the reception).
* You will NOT be reminded to send these emails.

### If the Prospect Replies

* If you receive an affirmative communication that the prospect would like to become a Partner:
	+ Send Template #3: Welcome to SVP.
	+ CC Lynn Coriano and referring partners.
	+ BCC SVP Outreach committee.
	+ Lynn will send the official email and necessary materials and BCC staff and board.
	+ Board chair will send a welcome email as well.
* If you receive an email requesting additional information:
	+ Respond appropriately to address questions and suggest a time to talk further.
	+ CC appropriate partners.
	+ *Indicate in your email when you think it is appropriate to follow up. This will be the clue for Megan of when to remind you.*
	+ BCC Megan Bartot so details can be entered into Salesforce. Staff entries will reflect the most current email content.
	+ You WILL be reminded of follow up emails as appropriate.
* If a prospect replies they are not interested:
	+ Send Template #4: All the Best.
	+ Include the words ***ALL THE BEST***.
	+ BCC Megan Bartot to enter info into Salesforce.

### If an ATTENDEE Does Not Reply

* 2-3 days after the original note:
	+ Send a Template #5 First Follow Up Email for Attendee.
	+ You will NOT be reminded to send this email.
* If you still don’t receive a reply 2-3 weeks after the reception:
	+ Send a Template #6 Second Follow-Up Email for Attendee.
	+ You will NOT be reminded to send this email.
	+ Indicate in the email that you will follow up in a few months. This is a clue for Megan to remind you in 6 months.
	+ BCC Megan so she knows to put in Salesforce with a reminder in 6 months.
* If you still don’t receive a reply 6 months after the reception:
	+ Staff will send you a reminder to follow up.
	+ Indicate in the email that you will follow up in a few months. This is a clue for Megan to remind you in 6 months.
	+ Send a Template #7: Third Follow-Up Email for Attendees.
	+ BCC Megan so she can send a reminder in another 6 months.
* If you still don’t receive a reply 1 year after the original reception:
	+ Staff will send you a reminder to follow up.
	+ Send a Template #8: Fourth Follow-Up Email for Attendees.
	+ BCC Megan so she can send a reminder in one year.

### If a NO SHOW Does Not Reply

* 2-3 days after the original note:
	+ Send a Template #9 First Follow Up Email for No Shows.
	+ You will NOT be reminded to send this email.
* If you still don’t receive a reply 2-3 weeks after the reception:
	+ Send a Template #10 Second Follow-Up Email for Attendee.
	+ You will NOT be reminded to send this email.
	+ Indicate in the email that you will follow up in a few months. This is a clue to Megan to remind you in 6 months.
	+ BCC Megan so she knows to put in Salesforce with a reminder in 6 months.
* If you still don’t receive a reply 6 months after the reception:
	+ Staff will send you a reminder to follow up.
	+ Send a Template #11: Third Follow-Up Email for Attendees.
	+ Include the words ALL THE BEST in this email so the prospect can be removed from future reminders. We figure someone who never showed up and did not reply is simply not interested.
	+ BCC Megan so she can send a reminder in another 6 months.