ACCELERIST

PROSPECTING

Customer Tool Guide

To log on:

- Visit [members.accelerist.com.](members.accelerist.com) Existing members' login and password will automatically work.
- For New Customers:
  - One team admin will need to register your account at members.accelerist.com. Once your organization is registered, it will take no more than 24 hours to approve the admin to begin using the system.
  - Account admins are able to invite users via an invite link found on the "Users" tab. New users that have an existing organization in the system should **NOT** register. They will log in using their email and the password provided via the invite link. The invite looks like the below:
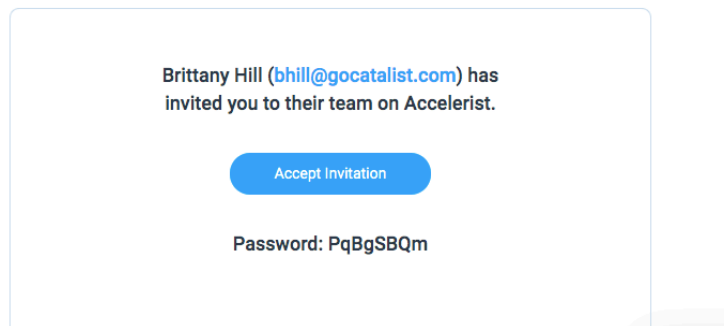
  - Once you are logged in, you will be able to personalize your account and change your password.

First Steps After Log In:

- Please visit your profile details either input your information or make sure all organizational information appears correct. If it is not correct, please contact your account or team admin to coordinate editing it.
  - You are able to navigate to this area from the upper right-hand corner if it does not automatically show up. You will see your Organization profile first but can navigate to your user profile to edit personal information, manage users, upload your organization logo/personal photo or change your password.
- On your Organization Profile please complete the following information. Please know that an admin of your organization can edit this profile at any time.
  - Type of Organization – organizational information
    - Organization Name

- Total number of constituents (drop down menu)
- Annual Total Contributions – This can be pulled from your 990
- Why Statement – why your organization exists/ heart and soul of your mission. Example: *We exist to eliminate pain and optimize the life of the 54 million Americans living in pain. OR We exist to end this disease with groundbreaking research.*
- Organization Twitter – please do not include https: Example: www.twitter.com/acceleristtweet
- Organization Linkedin – please do not include https: Example: www.linkedin.com/Accelerist
- Organization twitter handle. Example: @acceleristtweet – we ask for your handle for audience analytics. Based on your handle we can pull in affinities of your social followers as a baseline of your constituents. You will also be able to see brand affinities based off of your social following.

o Current Corporate Partners
- You are able to list current corporate partners, however this is optional. Listing your partners will eliminate them from your prospect pool as your search for companies. If you still want to keep an eye on your partner's profile, you may not want to list them here.

o Organization Contact Information
- Full Name – please list your organizational admin or primary contact for the organization
- Phone
- Website – NOTE: This will be auto-populated in our pitch enablement feature – allowing you to deploying initial email outreach faster.
- Email

o SDG Alignment
- Please select the Sustainable Development goals your organization most aligns with

o Organization Address
o Types of Investment
- Please select which types of investment you are currently interested in. Your admin can change this at any time if it shifts.

o Mission
- Primary Mission Focus – Define your mission area
- Secondary Mission Focus – You can add up to 3 additional sub-areas of your mission.
- Employee Engagement – Do you have an employee engagement opportunity to offer?

- o Opportunities – you will have the ability to input up to 3 key funding priorities you are seeking corporate support for right now. NOTE: These will be auto-populated in our pitch enablement feature – allowing you to deploying initial email outreach faster. Think strategically about how you want to enter this based off of how the entire team is prospecting.
- o Impact Statements – you will have the ability to input up to 3 impact statements. NOTE: These will be auto-populated in our pitch enablement feature – allowing you to deploying initial email outreach faster.

Getting Started:
Return to your dashboard to begin your search for the perfect prospect! You can start in 2 different ways:
- o 1) Enter a specific company name or keyword in the search bar to generate your first list.
- o 2) Click on the magnifying glass in the search bar to reveal the Advanced Filters. You can generate a lead list and filter in/out certain preferences.
- o Once you find a set of prospects you are interested in, try "Saving a List" as your first "Prospecting Session", which will populate in your "Dashboard". You can create an unlimited amount of sessions by saving multiple lists, across your entire team. You can export these lists to excel by clicking 'Export to Excel' if you would like to save them in your own CRM.
- o You can also favorite companies as a way to quickly save them by clicking the heart icon. These will be saved in your "favorites" folder on the dashboard for future reference.

Walking through Corporate Profiles:

Search results will yield overviews of companies that look like the below:

The Priority ranking score is essentially your "Match Score" with the company. These are currently based on our algorithm and matched against your mission area, SDG goals, CSR focus, areas of opportunity, and geographic location. You can also adjust and customize your own algorithm within the platform by choosing which attributes are most important to you, and how you want your prospects scored. The ranking scores are from 1 to 100, with 100 being a perfect match.   We typically deem a 60 or above as a strong match.

You will also be able to see areas of alignment that you matched against once you open the full company profile. This will be available in the top right-hand corner once the profile is open.

If you would like to view more about the company, click "Profile" to open a full company profile. Within the profile you will find:

- o Business Description
- o Similar Companies
- o Parent companies (if applicable)
- o Revenue Reported
- o Employees reported
- o Company ticker
- o Contacts

- Contacts are pulled from LinkedIn Sales Navigator, Zoominfo and other industry resources. These will display pre-qualified individuals that you are able to pitch.
- Accuracy scores reflect how accurate and relevant that contact is. You can also check if you have any existing connections with the contact by checking their LinkedIn easily accessible from the page.
- You can deploy a pitch directly to a corporate executive you may be interested in. Simply click "Pitch". The system should automatically recognize your e-mail client and auto-populate a best-in-class outreach email – incorporating your "Opportunities" and "Impact Statements" from your organization profile, as well as thought-starters from our own pitch index that is unique to the partnership activity of the company. You can edit this information, attach media to the email, and "send". Once you do, it will record your activity and report on your "Dashboard". You will receive a response in your inbox (not through our system). To view a sample [click here.](#)

o Company Contact info (general information)
o Social Impact information
o Types of Investments - investments the company is currently interested in
o CSR Focus – A complete list of the company's Corporate Social Responsibility focus areas
o "Request Profile Update" Button – This button contacts our team if at any time you would like the refresh the company page to see if there are any updates
o SDG Goal Alignment - This will highlight the company's Sustainable Development goals
o Contributions
- Cash Contributions
- Employee contributions
- Total Social Contributions
- In-kind contributions
o Charitable Partners
o Charitable Focus & Programs – This will be linked directly to either a company CSR report or their website to find more information on current programs
o GRI Compliance – If they are currently reporting to the Global Reporting Institute
o Customer Demographics – This will break down THEIR customers by age, gender, income, ethnicity and display the company's constituent affiliations and brand affinities – this is a perfect place to look for alignment
o Along the side of every profile you will also notice news and scoops about the company. This is pulled in by our API with zoom info and gives you up to date

information about the company. Stories will include either the company being featured in the headline, Press releases, or mentions of the company.

Where is this profile information coming from?
We source information from ZoomInfo, along with other public APIs and Artificial Intelligence engines that scour social networks, public information, tax information and professional databases for real-time data. We also have humans that validate information and update the most relevant information based on what may be happening in the world – example: We updated profiles due to various COVID responses from companies.

Using my Dashboard:
Your dashboard is shared by all who are logging into your organization. This makes it easier to manage and track who may be sending pitches and searching for certain prospects. Initially on your dashboard you will see:

- Prospecting sessions – Any saved sessions that your team has created accessible directly from the dashboard. You will also be able to view who owns the session (who originally created it) and the last activity on it.
- Favorites – Any companies that have been favorited
- Reports – This is where you can monitor team activity. Search sessions allow you to quickly glance at the number of prospecting sessions
    - Sent Pitches – you can click "Sent pitches" to monitor who has sent a pitch to which company and when the pitch was sent. See below:

- You are also able to visit the Prospect Navigator – Clicking this will allow you to monitor our weekly update of trending industries and new partnerships announced. We send a push notification when this is updated every Tuesday and if you would like to be included on the email please let us know at members@accelerist.com.
- Last login displays who from your team was in your account most recently.

Additional Information

If you happen to see an incomplete profile and/or a company that is not found within our database, please report it by clicking "Accelerist Support" from your Prospecting Session or "Request Profile Update" within the Company Profile itself. Or, you can always reach our Customer Experience team at members@accelerist.com.

To view additional FAQS about the prospecting engine please click here.