



Corporate Relations Self-Assessment

To have a successful corporate relations program, there are four areas to be considered: planning, value, marketing and quality. If any one of these areas is not thoughtfully considered, your corporate relations program will not be as effective as it can be.

To determine your level of readiness for the implementation of a corporate relations program take the self-assessment below.

<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%; border-bottom: none;">Your Name _____</td> <td style="width: 40%; border-bottom: none;">Date _____</td> </tr> </table>	Your Name _____	Date _____
Your Name _____	Date _____	
Organization Name _____		

PLANNING SCORE

Planning

1. Do you have a comprehensive long-range development plan in place?

	Score
You have a complete development plan in place to include all aspects of fund-raising to cover both long-term and short-term fund-raising goals.	5
You are working from a rough draft or a fluid development plan.	4
You can see the importance of a development plan but you don't know where to begin.	3
You can't see the importance of a development plan but you're willing to try.	2
You can't see the importance of a development plan.	1



Corporate Relations Self-Assessment

	Score
2. To what level is your board actively involved in your corporate relations program?	
Your Board supports all development efforts and uses their network to connect you with the appropriate champions within potential corporate sponsors.	5
Your Board is aware of your development efforts and has mentioned they may have contacts with potential corporate sponsors.	4
Your Board is aware of your development efforts but the board tends not to be participative when it comes to development efforts.	3
You haven't involved your board in development efforts but you're willing to try.	2
You don't think your Board would be interested in your development efforts.	1

	Score
3. Have you determined whether or not a corporate relations strategy can work for you?	
You have completed a feasibility assessment and are reasonably convinced that a corporate relations strategy could work for you.	5
You have conducted an informal feasibility assessment by conferring with a few corporate representatives who understand your organization well.	4
You know that you need a feasibility assessment and have identified company representatives to help you.	3
You would like to implement a feasibility assessment but have not yet.	2
You've never considered a feasibility assessment and you're not sure how effective it would be if you implemented one.	1

	Score
4. Have you identified a champion who will make your case internally at each prospect company?	
You have researched and identified an enthusiastic champion within each corporate prospect.	5
You have researched and identified an enthusiastic champion within some of your corporate prospects.	4
You know why someone would champion your organization but have not yet identified the appropriate people.	3
You don't know how to go about finding a champion but are willing to try.	2
You don't know why anyone would be willing to champion your cause.	1



Corporate Relations Self-Assessment

5. Have you identified the best corporate contact person (the decision maker) for each prospect company and have good relationships with them?

	Score
You have identified the best corporate contact person at each company and have good relationships with them.	5
You have identified the best corporate contact person at each company but don't have a relationship with most of them.	4
You understand the value of the contact person but you don't know how to identify that person.	3
Your not sure why there is value in having a contact person and you don't know how to identify the person, but you're open to the idea.	2
You don't know why anyone from each prospect company would agree to being a contact to your organization.	1

VALUE SCORE

Value

6. Can you clearly define the dollar value of your organization's offerings?

	Score
You have a complete and clear understanding of the value of your organization's offerings.	5
You have a good sense of the value of your offerings.	4
You can identify some of the value a company could want.	3
You're not sure of what value your organization can offer but you're open to the possibility.	2
You don't think a company would find anything your organization could offer valuable.	1



Corporate Relations Self-Assessment

	Score
7. Have you matched your mission and goals to the strategic initiatives and goals of your corporate prospect list?	
You have matched your organization's mission to the corporate goals and initiatives of all of your prospective corporate sponsors.	5
You have matched your organization's mission to the corporate goals and initiatives of some of your prospective corporate sponsors.	4
You know it is important to find corporate sponsors with goals and initiatives that match your organization's mission but have yet found them.	3
You don't know how to find prospective corporate sponsors who have goals and initiatives that match but you're willing to try.	2
You can't imagine why any corporate sponsors would be interested in your organization's mission.	1

	Score
8. How well do you know the market that your organization serves?	
You have a clear understanding of the market your organization serves: you maintain statistics and demographic data about the market.	5
You have a vague idea of the market your organization serves but have not yet collected data.	4
You know it's important to collect this data and understand the market your organization serves, but you don't know how to collect or use the data.	3
You hadn't thought to collect this information but you're willing to try.	2
You don't think it's important to know the market.	1

	Score
9. Do you use your organization's brand as a benefit?	
Your partners and network benefit from being associated with the strong brand of your organization.	5
Your organization has a strong brand that your partners and network value but you've never considered it a benefit for anyone other than your organization.	4
Your brand should be stronger and you would use your brand as a benefit to your partners and network.	3
A strong brand is not important to your organization.	2
Allowing partners to benefit from your brand will hurt your organization's image and negatively impact its mission.	1



QUALITY SCORE

Quality

	Score
10. Do you have a feasible, long-term cultivation process planned for each corporate relationship?	
You have a plan to move corporate relationships from “acquaintance” to “partner” and have assigned all of your corporate prospects to a position somewhere on the scale.	5
You have a plan to move corporate relationships from “acquaintance” to “partner” and have started the process.	4
You have a plan to develop corporate relationships but don’t know how.	3
You have no plans to develop corporate relationships but you think it’s a great idea and are willing to try.	2
You can’t think of any company that would be interested in a relationship with your organization.	1

	Score
11. Do you actively cultivate and manage each corporate relationship?	
You have a contact system set up that allows you to regularly maintain contact with individual corporate representatives and you use it consistently.	5
You have a contact system set up but don’t use it to its full potential.	4
You have planned to create a contact system but don’t know how to make it work for you.	3
You don’t know how to create a contact system but you’re willing to try.	2
You don’t see the need for a contact system.	1



	Score
12. Do you leverage the valuable expertise of your network to benefit your corporate partners?	
Your corporate partners presently benefit from access to your network of experts and they pay for that access.	5
You are aware of the value of your network but you offer it as a courtesy to your corporate partners.	4
You presently offer your network's valuable expertise to your market and the public and had not thought of it as a benefit to corporate partners.	3
You are not aware of what valuable expertise your network offers but you're willing to evaluate the possibility.	2
Don't think your network has any valuable expertise that a corporate partner would be interested in.	1

MARKETING SCORE

Marketing

	Score
13. How strong is your organization's brand?	
You have high brand recognition and your mission is strongly identifiable.	5
Your organization is recognized but your mission is not.	4
You want to be recognized and know the steps it takes but have not yet taken them.	3
You think visibility is necessary and are willing to try and gain it.	2
You don't believe that your organization can and/or should be positioned for high visibility and strong brand recognition.	1

	Score
14. Have you packaged your value into an attractive offering for potential corporate supporters?	
Your benefits package is highly valuable and sought by companies with an interest in your mission.	5
Your benefits package is highly valuable but you have not packaged them into an attractive offering or marketed them yet.	4
You are presently in the process of crafting your benefits package.	3
You don't know how to articulate your benefits and value but are willing to try.	2
You're not willing to package your benefits.	1



Corporate Relations Self-Assessment

	Score
15. Have you developed well-tuned messages to educate and interest companies in a relationship with your organization?	
You've developed marketing messages to educate corporate partners on your mission and interest them in your benefits.	5
You have marketing messages that neither educate nor interest.	4
You know you need marketing messages but have not yet developed them.	3
You're not sure why you need marketing messages but you are willing to try it.	2
You don't see the value in marketing messages and don't want to use them.	1

TOTAL SCORE

How Ready Are You?

Add the scores from each of the four red focus areas to determine your total score. Evaluate your score according to the scale below.

Assessment Scale	
61 to 75	You have a well-planned development strategy and are ready to infuse your program with an effective corporate relations program.
48 to 60	You're nearly there! You have much in place and can use some help with your strategic planning to prepare for a corporate relations program.
30 to 47	You need to get back to the basics on development. Your planning and/or implementation is not working effectively. Consider re-evaluating your strategic development plan and implementation plan.
29 or below	You are not ready for a corporate relations strategy. You may not understand enough about the value of a corporate relations strategy to determine whether or not it will work for you or a corporate relations strategy might not be right for you.