Lina

1) Tailored Messaging & Positioning

a) Identify **decision-makers**: directors, CEOs, heads of partnerships, or development officers.
b) Learn about each institution's mission, expansion history, and community engagement initiatives.
c) Prepare a **short institution-specific talking point** (e.g., "I saw your recent expansion in X city," or "Your educational programming aligns with what Clearwater envisions").

- Segment messaging for:
  - **Museums & cultural institutions** → emphasize visibility, legacy, and cultural leadership.
  - **Innovation/educational institutions** → highlight talent pipelines, research potential, and audience reach.
  - **International organizations** → focus on Clearwater's hospitality/tourism market as an entry point into the U.S.

---

2) Direct Engagement & Relationship-Building

- Assign staff, or council to **personally contact leadership** (directors, CEOs, development heads) at target institutions.
- Organize **one-on-one virtual briefings** to present the opportunity.
- Host a **site visit & showcase weekend** where potential applicants are invited to Clearwater for tours, presentations, and community engagement sessions.

- Personalized check-ins reminding of **RFP timeline**.
- Offer staff support for proposal preparation questions.
- Log every outreach attempt and response.

---

3. Tiered Priority System

Not all prospects are equal. Categorize into:

- **Tier 1 (High-Priority):** National/international flagship institutions → personal calls monthly.
- **Tier 2 (Medium-Priority):** Regional/niche institutions → monthly email + quarterly call.
- **Tier 3 (Low-Priority):** Institutions showing low interest → automated updates only.

---

4. Reporting & Accountability

- Weekly: Review progress (number of calls made, responses received).
- Monthly: Summarize outreach metrics → e.g., "40 calls placed, 12 warm leads, 3 scheduling meetings."
- End of RFP cycle: Export contact log + outcomes as a final report for trustees/staff.

---

5. Best Practices

- Always set a **next action date** before ending a call or sending a follow-up (never leave it open-ended).
- Use consistent subject lines for email follow-ups: *"Clearwater Partnership Opportunity – Follow-Up"*.
- Color-code statuses in the log (green = committed, yellow = interested, red = no interest).

Follow-Up & Record-Keeping Strategy

1. Contact Log System

Use a **CRM (Customer Relationship Management tool)** like HubSpot, Airtable, or even Excel/Google Sheets
Key fields to track:

- Institution name
- Contact name & title
- Contact info (phone/email)
- Date of first contact
- Notes from call (interests, objections, timing needs)
- Follow-up dates scheduled
- Status (New Lead, Warm Lead, Committed, Declined)

---

2. Follow-Up Cadence

Day 1 (Initial Call/Email Sent):

- Log notes immediately (tone of call, specific interests, any next steps).
- Email the **Opportunity Prospectus** and thank them for their time.

Week 1 (First Follow-Up):

- Reach out if no response to email.
- Suggest a **short virtual meeting** (15–20 minutes).
- Update log: "Follow-up #1 sent."

Week 3 (Second Follow-Up):

- Share an article, press release, or news about Clearwater's cultural growth (adds value instead of just asking).
- Update log: "Follow-up #2 shared resources."

Month 2–3 (Nurture Stage):

- Invite them to a **virtual info session or site visit event.**
- Update log: "Invited to showcase event."

Month 4–6 (Deadline Window):