

ForImpact

GLOSSARY

Frequently used terms and phrases in the For Impact vocabulary

Term	Definition and References
Altitude Framework	30,000' = "the Why" = Vision 14,000' = "the What" = Strategy 3' = "the How" = Tactics
Ask	1) Physically with a prospect; 2) asking for specific help with a specific project, program or level of support; 3) in a dialogue; and 4) with an expectation of a YES or a NO – and appropriate follow-up.
Blue Box Message	Simple... dead simple... 30,000' message.
Call Memo	An internal memo that captures the flow of the visit, discovery (information gathered), key phrases (quotes) from the prospect and action steps.
Case for Support	A simple message; answers the common questions about your organization or project; and communicates the why/what/how with a funding plan or funding rationale.
Close	A framing device to share a qualified prospect to help drive the conversation towards an ask.
Commitment	An agreed upon 'yes' in the form of what was asked or in the form of a roadmap towards the ask (<i>e.g.</i> , could be "yes to being a champion," could be "yes to \$x over three years").
Discovery (with a prospect)	Process of listening (Asking Questions!!!) and learning about relationship, cause, and capacity.
Do the Math	Owning and internalizing an understanding of your numbers. BLUE MATH: Funding Rationale. (<i>E.g.</i> , \$5K per fellow/family/child)

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	<p>RED MATH: Your budget (understanding of revenue vs. expenses)</p> <p>GREEN MATH: Your funding GOAL and HOW you're going to get there.</p>
Engagement Tool	<p>It is a specific, visual way to ENGAGE the Prospect in CONVERSATION and DIALOGUE; it's a great FRAMEWORK for the VISIT/PRESENTATION; it puts the 'CLOSE' (HOW YOU CAN HELP) right in front of the Presenter(s) (Sales Team) and the Prospect.</p>
Follow-up	<p>Requires a specific strategy; taking the opportunity to continue the excitement generated on the visit. You're literally trying to continue the momentum.</p>
For Impact Point-of-View (POV)	<p>1) Impact drives income. 2) Be For Impact. 3) Just Ask. + All the principles and implications</p>
Framework	<p>A pathway for thinking through a challenge or complex issue</p>
Funding Plan	<p>The "how" behind your big picture dollar goal</p> <ul style="list-style-type: none"> • Determine the dollar amount you need for both operations and projects. What is the lump sum? Do the math! (80% of organizations can't answer this question.) • How many investments would you need – and at what amounts – to achieve this goal? • When? (One year? Three years? Five years?)
Funding Priorities	<p>(No more than) THREE* simple strategic priorities (at 14,000') that advance the organization toward the goal, aligning with purpose.</p>
Funding Rationale	<p>Something to ask for; usually tied to a plan, program, or person. Converts the emotion of your impact/message into something concrete.</p>
Greensheet (Dashboard)	<p>Reporting tool for accountability and communication</p>

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	during the sales process.
Knowledge Base	Part of the STRATEGY CHECKLIST. A download / research of information about the prospect. Includes Capacity, Relationship, Gift History, Timing Notes, Philanthropic
Master Prospect List (MPL)	The ONE list that ranks and rates your prospects in descending order of importance.
Memorable Experience	A showcase for your cause and your organization that serves as a predisposition to presenting the opportunity.
Message	Should be clear, concise, and compelling. Fit on a napkin.
Numbers on the Table	As in, "On the visit we were able to get 'numbers on the table'."
Permission to Proceed	An action in the course of a relationship or a visit to move forward. Used to turn a 3-year process into a 30-minute process, <i>e.g.</i> , "Would it be okay with you if we were to share our funding plan and talk about how you could help?"
Predisposition	Everything you can do ahead of the visit to make it NOT a cold call. Predispose to your Organization, to the ASK and to YOU (who are you?)
Presentation	The act of sharing the story and engaging the prospect (discovery, dialogue) at 30,000', 14,000' and then PRESENTING THE OPPORTUNITY at 3'. 'THE PRESENTATION' refers to this COMPLETE PROCESS. we should not assume ANY relationship is maximized without making the presentation.
Prospect Action Plan	100-day plan of action by prospect.
Qualified Prospect	Has capacity and a relationship to the cause.
Referral Sheet	List of names and basic information about possible referrals; to use with prospect to help identify other prospects and prospect strategy.

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Strategy Checklist	A formal checklist to cover the prospect STRATEGY. Work through this (ideally) to help you prioritize the prospect and BEFORE predisposition.
Road map	As in <i>"Our goal on this visit is to get a road map to the commitment"</i> .
Rule of 3	Framing 3 things to simplify a concept. People are wired to receive and remember 3 things.
Sales Process	Plan (Case for Support, Presentation Design, Qualified Prospects) and Execute (Predispose, Present, Follow-up)
Triple Ask	Today. Tomorrow. Forever.
Visit	A structured one-on-one that includes discovery, dialogue around the [plan/vision/program/story] and some progress toward a relationship goal.
Visit Checklist	Like an pre-flight checklist, this is a list of discussion points to discuss and plan a visit with a prospect (includes flow of the visit, visit goals, roles, etc).