

ENGAGE!!!

2009: THE YEAR OF *ENGAGEMENT*

Martin Luther King said,

“I HAVE A *DREAM!*”

He didn't say, “*I have a Strategic Plan.*”

Then, Andy Grove of Intel fame said,

“*ENGAGE. THEN PLAN.*”

Then, Goose said to Maverick,

“*ENGAGE, MAV, ENGAGE!!!*”

This is our For Impact Challenge to you for 2009:

ENGAGE!!!

Nota Bene (Note Well): Just so there is no confusion, ***ENGAGE*** means

VISIT... SHOULDER TO SHOULDER... OUT of your OFFICE!!!

ENGAGE!!!

2009: THE YEAR OF ENGAGEMENT

OVERVIEW

2008 was definitely a year of 'EXPERIENCES'.

2009 needs to play off those EXPERIENCES and become a year of '**ENGAGEMENT!**'

IF you commit to **ENGAGING** your *CHAMPIONS* and your *MOST QUALIFIED PROSPECTS* in 2009... your entire organization will be TRANSFORMED!

To ensure this TRANSFORMATION, and the subsequent ability to SCALE and GROW your IMPACT, let's do a 'Covey' and "**BEGIN WITH THE END IN MIND**".

[If you're reading this, I'm assuming you have totally bought into the **IMPACT DRIVES INCOME** insight and epiphany; and that **more INCOME** creates **much more IMPACT**.]

More MONEY to Fund the Vision means...

More PRESENTATIONS to Share the Story and Present the Opportunity, which means...

More VISITS...

Which is the guts, essence, and focus of your **YEAR OF ENGAGEMENT!**

Take a look at this simple IMPACT  INCOME overview on the next page.

Following that are some RULES OF ENGAGEMENT and a SIMPLIFIED ACTION PLAN to help make this your best year ever.

Go Forth and ENGAGE!



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“BEGIN WITH THE END IN MIND” — COVEY



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RULES OF ENGAGEMENT

Here are 9 FOR IMPACT ideas and principles to help you make 2009 your best Impact/Income year ever.

1. **IMPACT** drives **INCOME**. Not the other way around.

“No Money. No Mission.”
—Covey

“No Mission. No Money.”
—Suddes

It's **not** about 'fundraising' or 'asking people for money'. It's about **ENGAGING** your Champions and very best prospects in a **CONVERSATION** about your **IMPACT**.

INCOME (money) will follow.

2. **MAXIMIZE RELATIONSHIPS... at this GIVEN MOMENT.**

You are in the 'relationship business'. Relationships are about **ENGAGEMENT**.

'GIVEN MOMENT' equals **ENGAGE... NOW!**

*This principle makes the whole 'ECONOMY' thing moot, irrelevant, meaningless. (This too shall pass. Now, more than ever.) Stop making decisions (in advance!) for people. **JUST ENGAGE!**

3. **THINK BIG. BUILD SIMPLE. ACT NOW.**

Entrepreneur's Mantra. Key to successful **ENGAGEMENT**.

Think Big. Champions and potential investors want to hear about transformation, vision, impact (not survival, the recession, cutbacks).

Build Simple. They want a simple message, a simple plan and a simple way to help. Give it to them.

Act Now. They won't come to you. You need to **ACT (ENGAGE) NOW.**

4. **Different RESULTS require a different DESIGN.**

*“You are perfectly **DESIGNED** to get the **RESULTS** you are getting.”*
—Tim Kight

If you're not happy with '08 results, or the predictions for '09, you've got to **CHANGE** the **DESIGN** (or face Big Al's definition of insanity!). 'Traditional' models aren't working.

It's time for innovation and creativity. It's time to re-think the entire way you do business! Get rid of past baggage and turn sacred cows into hamburger. Use a new Holistic Funding Model based on **ENGAGEMENT** in the world as it exists today (not the one from the 1950's). (see addendum)

5. DO THE MATH.

“People buy on EMOTION and justify with LOGIC.”

—Zig Ziglar

What is the ‘LOGIC’ behind your presentation? What are the ‘NUMBERS’ that justify your Case for Support? What is the R.O.I.? The Value Proposition? How much do you need to Fund your Vision? Where does the money go? Exactly how many people do you need to ENGAGE to achieve ‘success’?

DOING THE MATH is the **only** way to ensure the ‘LOGIC’ supports the ‘MAGIC’!

6. HOPE is NOT a STRATEGY.

Define SUCCESS. Set Big Hairy Audacious Goals. Break them into ‘CHUNKS’. Figure out how to MEASURE your progress. ‘STRATEGIC PLANS’ are worthless. (See Andy Grove.) ACTION PLANS... based on aggressive, achievable GOALS and executed with a focus on ENGAGEMENT... CHANGE THE ENTIRE GAME.

7. YOU’RE IN SALES. GET OVER IT.

You’ve heard this message many times. This is the year to APPLY the underlying principle. ‘SALES’ drives everything. (Products minus sales equal ‘scrap’.)

If you’re not out SELLING, VISITING, PRESENTING, **ENGAGING...** you’re not really committed to your CAUSE and your IMPACT.

8. FOCUS. FOCUS. FOCUS.

“You become what you think about.”

—Earl Nightingale

This is Earl’s ‘*STRANGEST SECRET*’. Make 2009 the year that ALL you THINK about is **ENGAGING** with your best Champions and your most QUALIFIED PROSPECTS.

The principle of laser-like **FOCUS** is the single greatest attribute of most successful people. **No more** focusing on special events, golf, galas, direct mail, shotgun grants, formal proposals, etc. Let others worry about search committees, reports, meetings, etc.

FOCUS, FOCUS, FOCUS on ENGAGEMENT... and your ‘RESULTS’ will be exponential!

9. JUST ASK. JUST ASK. JUST ASK.

Nothing you do during this year of ENGAGEMENT is as important as **JUST ASK.**

“48% of all sales people don’t close.”

—Brian Tracy

“65% of sales people don’t ask for the order.”

—Jack Canfield

If you truly commit to a year of ENGAGEMENT... then you are committing to:

More VISITS, more PRESENTATIONS, and more ‘ASKS’!

JUST ASK for HELP.

JUST ASK to CHAMPION your CAUSE and your ORGANIZATION.

JUST ASK to INVITE others to be ENGAGED.

JUST ASK for a COMMENSURATE COMMITMENT.

*****And, in the best of the world of ENGAGEMENT, make a ‘TRIPLE ASK’!!!**

(TODAY. TOMORROW. FOREVER.)

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SIMPLIFIED ACTION PLAN

***WARNING:** It's pretty easy to run down this list and blow off a number of these with "We've already got this."

If you're truly committed to a year of **ENGAGEMENT**, then get it done to the best of your organization's ability, in a timely fashion and as **SIMPLY** as possible.

1. SIMPLIFY YOUR MESSAGE!

Create a **clear, concise and compelling MESSAGE...** in order to **ENGAGE** people at the highest level of **DIALOGUE** around your **VISION** and **PURPOSE** and **CAUSE**.

2. BUILD YOUR CASE FOR SUPPORT!

What is the **VALUE PROPOSITION**? What is the **RETURN-ON-INVESTMENT**? ('Both/And' Left Brain/Right Brain. Logic/Magic. Tangible/Intangible.) What are your **PRIORITIES**? (Simplified to 3 Circles or 3 Buckets)

3. DO THE MATH!

Do your '**Blue**' **MATH** around your Impact and your '**Green**' **MATH** around your Cost of Delivery and Funding Model.

Here are some simple examples to get you going.

What would you do with \$1 Million???

What kind of impact will a \$10,000 President's Circle investment make?

What does the specific impact of \$1,000 have on the people you serve?

4. Create a simple, powerful PRESENTATION/STORY LINE...

and PRESENTATION TOOL (Napkin, Vision Card, Map, whatever) that provides a **FRAMEWORK** and **FLOW** for the **VISIT**.

HOPE is not a **STRATEGY**. **SELLING** is not **TELLING** (unless it's a story!) It is our responsibility to control the **FLOW** of the visit. The absolute best way to do this is to have some kind of one-on-one

PRESENTATION TOOL that allows you to move from **PURPOSE** to **PRIORITIES** to **PLAN...** and then **PRESENT THE OPPORTUNITY** to help!!!

***If you need more help with this, there are examples at www.forimpact.org. You can also contact us directly for specific assistance.

5. SET YOUR GOALS OF ENGAGEMENT!

These goals need to be 6 SPECIFIC, WRITTEN and MEASURABLE.

3 Examples:

The '33 GIFTS' Plan.

We will **ENGAGE** with our TOP 50 PROSPECTS in order to generate **33 COMMITMENTS**, which will provide **90%±** of our funding needs!

This will be a SELF-FULFILLING PROPHECY.

For example, We will generate \$5 Million from:

1 Gift of	\$1 Million
2 Gifts of	\$500,000
4 Gifts of	\$250,000
10 Gifts of	\$100,000
16 Gifts of	\$50,000
33	\$5 Million

The 'SPARTAN 300' Plan.

We will **ENGAGE** with our best **300 prospects** in 2009 (including our Top 33).

Example: if we have (3) members of the SALES TEAM, we will collectively make **30 VISITS** (ENGAGEMENTS) a **month** for **10 months** (using August and December for R&R). We will use a **3x3x3** goal which challenges us to **collectively** make **3 visits** a day, **3 days a week, 3 weeks out of the month**.

ENGAGING our TOP 300 potential investors will generate bags and buckets of money to Fund Our Vision.

The '1,000 ENGAGEMENT' Plan.

(An example of a larger organization with **6** committed Relationship Managers and Salespeople.)

We will make **1,000 VISITS/PRESENTATIONS** in 2009.

Each of our **6** Relationship Managers will have a Portfolio of **300** Qualified Prospects. Each of us will make **167 VISITS/PRESENTATIONS** (ENGAGEMENTS) this year.

We will average **15 QUALITY VISITS a month** and do all of the appropriate preparation, predisposition and follow-up.

We will do 'DISCOVERY' on every visit and with every prospect. We also commit to make the FULL PRESENTATION around the TRIPLE ASK for TODAY, TOMORROW and FOREVER (Annual Operations, Campaign Priorities and a legacy/planned gift.)

***20%** of these **167** visits will become our **TOP 33** gifts for each Relationship Manager.

6. Finalize your 2009 MASTER PROSPECT LIST!

IDENTIFY and PRIORITIZE and STRATEGIZE your best and most QUALIFIED PROSPECTS.

Your **Master Prospect List (MPL)** is your top prospects in **Descending Order of Importance!** The list is fluid and the order will change. However, you need to start out the year with your best shot at your MPL!

Of critical importance is your top **3** plus your next **10** plus your next **20!**

Once you have identified and prioritized these prospects, you need to STRATEGIZE each prospect in Descending Order of Importance.

***For much, much, much more on this entire process, see www.forimpact.org/prospects

7. Commit to better PREDISPOSITION.

"I can't get a visit." "They won't see me." "They haven't returned my call."

None of these excuses are acceptable in the YEAR OF ENGAGEMENT.

Do better PREDISPOSITION to set up the visit. Get your best prospects to a MEMORABLE EXPERIENCE... and then FOLLOW-UP!

You are **3°** away from **any** QUALIFIED PROSPECT! Use your Board, Natural Partners, and WHATEVER IT TAKES!!!

8. EXECUTE on this ENGAGEMENT!

Set up your January visits **right now!**

The YEAR OF ENGAGEMENT is all about FOCUS and DISCIPLINE and EXECUTION. Don't think... DO. Once you have your Funding Plan and ENGAGEMENT STRATEGY laid out... **EXECUTE!** (ACT!)

***Remember the '**Push-Up**' analogy. If you commit to **10,000** push-ups in 2009, the SIMPLEST and most SUCCESSFUL way to achieve that goal is to do **30 PUSH-UPS A DAY.** (1 set. 3 sets of 10. 2 push-ups an hour the 15 hours you're awake. Whatever.)

To reinforce this point even more, let's say you wanted to do **60,000** push-ups in 2009 (1,000 push-ups x your age). The SIMPLE EXECUTION is 180 push-ups, (3 sets of 60) **a day.**

The point is that you can't wait until June to begin your push-ups. Nor can you wait until November to make 100 visits (because you've only made 3 visits a month up until then).

9. Commit to **SHARING THE STORY** and **PRESENTING THE OPPORTUNITY!!!**

STOP 'CULTIVATING'! (Spreading manure on your prospects). Just **SHARE** the **STORY** on every visit. Then **PRESENT** people the **OPPORTUNITY** to **HELP!!**

Remember: They get more out of helping you than you get from helping them.

Special, Special Action Note: Start 2009's **YEAR OF ENGAGEMENT** off right by **CHANGING THE WAY YOU TALK!** **CHANGING THE WAY YOU TALK** is a proven technique to **CHANGE THE WAY YOU ACT** and **CHANGES YOUR RESULTS**.

Think **IMPACT, CAUSE, PHILANTHROPY, INVESTORS, INVESTMENT, PRESENTING OPPORTUNITIES, VISITS, PREDISPOSITION, SALES...** and, of course, **ENGAGEMENT!!!**

LOOK BACK FOR FEEDBACK. (Extra Credit!)

Take a few hours to review **last year's RESULTS!**

One way to do that is to list all of your '**SOURCES OF REVENUE**'... and the **COST** (**EXPENSES**) to generate that **REVENUE**.

	REVENUE (e.g.)	EXPENSES (Direct/Indirect)	NET \$
• Direct Mail/annual Fund			
• Special Events (Golf, Gala, etc)			
• Grants			
• Planned Gifts			
• Major Gifts			
• Etc.			

Be sure to include **ALL PERSONNEL COSTS** under **Indirect Expenses**. (If you want an even bleaker picture, include '**volunteer hours!**')

The point of this exercise is to reinforce the concept of **ENGAGEMENT** (**VISITS** with your best **PROSPECTS**) as the most cost effective way to generate the most **INCOME**.

You also might use this to review the **ROLES & RESPONSIBILITIES** of your **TEAM** (personnel)... and **RE-ALLOCATE RESOURCES** around **ENGAGEMENT**.

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THE 'TODAY. TOMORROW. FOREVER.' MODEL

