

Gold, Diamonds & Oil

[Artists Proof]



A **FOR IMPACT** GUIDE ON PROSPECTS

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“Get Good Names”

– Frank E. Sullivan

Dedication

This Guide is dedicated to those courageous souls who understand that we’re ALL in SALES (and we just need to get over it).

One of the most important parts of the SALES PROCESS is ‘WHO’ we sell to our best and most QUALIFIED PROSPECTS.

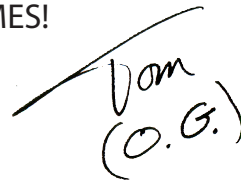
And, this is dedicated to the memory of my very first ‘sales’ mentor and coach, Frank E. Sullivan, a trustee at Notre Dame and one of the top life insurance salesmen in the world.

He took a young (dumb) ‘pup’ and tried to help him be the best he could be.

In his classic book, *THE CRITICAL PATH TO SALES SUCCESS*, Frank listed 5 activities that every salesman must perform in order of importance.

1. Establish Goals
2. **GET GOOD NAMES(!)**
3. Make the approach.
4. Make the presentation.
5. Make the customer a client.

Use this **Guidebook** as a resource to **GET GOOD NAMES!**

A handwritten signature in black ink that reads "Tom (O.G.)". The signature is slanted and has a long, sweeping underline that extends to the left.

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For Impact Guides

*“One WAY to get where you want to go...
is to find a good MAP and a smart GUIDE.”*

– Juan Enriquez

These For Impact GUIDES on a particular topic or area are designed to help you find your ‘WAY’. (It’s the whole TAO thing.)

We can’t tell you how many times during our training or talks or with coaching clients we have had people stop us and say, *“Just tell us what to do. You’ve been there, done this. Save us the time, money and energy.”*

This is one way we can honor that request.

For Impact Guides are where we share our thoughts, ideas and experiences ... in ‘nugget’ form aggregated on a specific topic.

It’s meant to be a quick read. To provide **motivation**, as well as ‘How-To’.

**READ. PRINT. SHARE.
USE.**

*“Let us, therefore, decide both upon the GOAL
and upon the WAY, and not fail to find some experienced
GUIDE who has explored the region towards
which we are advancing, for the conditions of this JOURNEY
are different from those of most travel.”*

– Seneca

GOLD, DIAMONDS & OIL

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Introduction

During the last 30 years, we have been involved in over 500 Campaigns that have raised over **\$1 Billion** and coached organizations towards another **\$1 Billion**. I've made over 6,000 ('Shoulder-to-Shoulder') personal visits. My partners and I have also trained or presented to over 10,000 For Impact Leaders, Volunteers, Development Staff, Social Entrepreneurial Programs and Organizations.

Additionally, we have worked with thousands of corporations, entrepreneurs and sales teams at our Eagle Creek Leadership & Challenge Center.

One of the big things we have learned from this experience is the critical nature of PROSPECTS.

There are very, very few things in the business world, sales world, or For Impact (Non-profit) world that are as universally recognized as:

"OUR BIGGEST PROBLEM ..."

"OUR BIGGEST CHALLENGE ..."

"OUR BIGGEST ISSUE ..."

"OUR MOST IMPORTANT PRIORITY ..."

"OUR MOST CRITICAL BLAH, BLAH, BLAH ..."

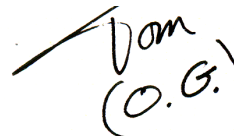
You can have **the best CAUSE/CASE / SERVICE/PRODUCT** in the world ...

You can have **the most powerful ENGAGEMENT TOOLS** in the world ...

You can have **the absolute best SALES TEAM** in the world ...

But, if you don't have 'PROSPECTS', you ain't got nothing!

This guidebook is designed to help you with context, ideas, systems, and specific action plans, to **IDENTIFY, PRIORITIZE, and STRATEGIZE** your best prospects.

A handwritten signature in black ink that reads "Don (O.G.)". The signature is stylized with a long, sweeping horizontal line above the name.

Special Note: This is written primarily from extensive experience within the fund/raising/development world. But I have done enough **SALES TRAINING** in the 'REAL WORLD' to make this guide **PRINCIPLE-BASED** ... and (I believe) of value to anyone in high-end sales.

WARNING

IF ... you're **NOT** committed to **SALES ...**

IF ... you're **NOT** going to make **VISITS ...**

IF ... you're **NOT** focused on a **'TOP-DOWN' APPROACH ...**

IF ... you're **NOT** going to **PRESENT THE OPPORTUNITY** to your **'TOP 33' ...**

THEN ... don't waste your time reading this.

**I guess if you're just trying to 'feel good' or you want to tell your Board or your boss or yourself that you are 'doing something' ... then go ahead.*

Just remember: 'ACTIVITY' is not the same as 'PRODUCTIVITY'.

MOTIVATION

In the 'old' Suddes Group, our Campaign Team Leaders would make **30 to 40 visits per month**, usually in 3 to 4 days a week, 2 to 3 weeks a month. We knew right away if a Campaign was 'struggling' because the VISITS/ PRESENTATIONS were not getting made.

I have been using a '3x3x3' model with many of our coaching clients lately.

3 visits a day x 3 days a week x 3 weeks a month. This model gets you to **27+ visits a month ...** and over **300 visits for the year!!!** Think what would happen if you made 300 'shoulder-to-shoulder' VISITS THIS YEAR!!!

One of my closest friends since our days together at Notre Dame is Jim Yoder. A Former partner with The Suddes Group, Jim has been running and managing large Campaigns for over 25 years.

On a recent Campaign, he spent 3 days ... every other week ... for 3 months ... working on a funding Initiative.

In that time he made: **100 VISITS!!!**

100 VISITS ... 100 PRESENTATIONS ... 18 days!!!!

P.S. Jim had **never met** any of those prospects or potential investors before he made those visits... *and* he Presented the Opportunity for them to make an investment in almost every single instance.

THE BIG QUESTION

In our work with thousands of 'nonprofit' organizations, staff and volunteers, as well as sales teams in the business world ...

this is the most **FREQUENTLY ASKED BIG, BIG, BIG QUESTION:**

“Where do we find new prospects?”

It's almost always followed by this comment:

“Our old prospects are tired of GIVING, tired of buying.”

THE **BIG ANSWER:**

“IT'S THE WRONG QUESTION!!!”

It's **NOT** about '**NEW**' PROSPECTS ... It's about the '**BEST**' PROSPECTS!!!

And, it's about **MAXIMIZING RELATIONSHIPS...**
with these **BEST** and **MOST QUALIFIED PROSPECTS...**
AT THIS GIVEN MOMENT!!!

A big part of our goal is always to help you Change the Way you **THINK** ... which Changes the Way you **OPERATE** ... and helps Change the Way you **FUND/SELL**.

As my good buddy Tim Kight says,

“You are PERFECTLY DESIGNED to get the RESULTS you're getting.”

If you want different results ... you need a different 'DESIGN!!!'

I want you to RE-THINK some of your current assumptions ...
and specifically RE-THINK the BIG QUESTION:

“Where do we find NEW prospects?”

THE BIG QUESTION (continued)

The reason many of **you** are looking for 'NEW' prospects is because you believe:

“We have gone to the proverbial ‘well’ too many times.”

“We can’t go back to our best prospects for more money.”

*“We are taking advantage of our current relationship
with our top prospects.”*

To this, I would add 3 other thoughts coming from **them** (your current top givers) that I also believe are very fair:

“I want you to get other people involved besides me.”

“I want you to broaden the base of support.”

*“I don’t want to be the only one funding this
organization/project”*

While ‘expanding your base’ and ‘bringing in new relationships’ is important to your organization, it’s not ‘the’ ANSWER to your funding challenges!!!

Again, (repetition is a good thing) the real ANSWER is:

**MAXIMIZING THE RELATIONSHIP
of your BEST and MOST QUALIFIED PROSPECTS.
AT THIS GIVEN MOMENT.**

“Be they old, new, green, or blue!”

*Paraphrasing Theodor Geisel (aka Dr. Seuss):

Relationships: Where Do We Start?

(A field note)

Many a committed and dedicated Social Entrepreneur, For Impact Leader or Staff Person has grabbed us after a talk or presentation and said:

“We have no relationships.”

“We have no real gift histories.”

“WHERE DO WE START???”

The “Where do we start” answer goes like this:

1. Find your very, very, very best 3 CHAMPIONS. Then:

- VISIT.
- ENGAGE.
- LISTEN.

2 . Ask them to REFER 3 more people each. Then:

- VISIT.
- ENGAGE.
- LISTEN.

3 . Do it over, and over, and over again.

*“Renew thyself daily. Do it again. And again.
And forever again.”*

—Thoreau

Challenge Your Thinking

I'd like to CHALLENGE your thinking on prospects with these 5 ideas:

1. **LOOK IN YOUR OWN BACKYARD!** Stop 'searching the world' for new prospects/fresh money. Before you figure out how to get to Bill Gates or Warren Buffet or the Walton's ... look to your own CHAMPIONS who have the strongest interest in your Cause and your Case.
2. **VISIT WITH CURRENT TOP GIVERS.** My own experience verifies that anyone already INVESTED significantly in your IMPACT... wants to continue to help you. I would also propose that in many, many cases, you haven't really, really, really presented them with your VISION for the future. I'm pretty sure you haven't shown them a FUNDING PLAN ... and where they FIT! And, as strange as it seems, you probably haven't really even ASKED.
3. **LOOK TO THE 'NEXT ROUND' OF FUNDING.** In the business world (especially with start-up organizations), an entrepreneur is constantly looking for money/funding/capital. That same entrepreneur always, always, always goes back to their INITIAL INVESTORS! (It's called moving from 'angel' investments to 'mezzanine' rounds to 'follow-on' rounds to 'Series A, Series B', etc.)

Many times, the people who invested the most in the beginning are also the ones who will continue to invest in the next 'rounds'. Why? Because they're the ones who believed in the plan ... and want to see it become reality.
4. **DON'T MAKE DECISIONS FOR YOUR PROSPECTIVE INVESTORS!** We always need to give our top investors an OPPORTUNITY to HELP! We should never make up their minds for them. They believe in what you do. You are preventing them from experiencing an opportunity to help ... because YOU have decided that you can't "*ask them for any more money.*"
5. **SEVEN TIMES THE COST.** In the 'real world', it is axiomatic that it is SEVEN times more expensive (in dollars and energy) to find/create NEW customers and NEW clients than it is to keep/expand EXISTING customers or clients.

* In business, that also means selling MORE products and services to CURRENT customers, users and investors. They call it 'UPSELL'. We call it 'MAXIMIZING RELATIONSHIPS'!

Gold, Diamonds And Oil

Here are the 3 stories from the title of this Guide Book to help you LOOK IN YOUR OWN 'BACKYARD' ... for your best prospects.

Russell H. Conwell wrote one of the most powerful and motivational classics of all times, *ACRES OF DIAMONDS*. First Published in 1921, Conwell actually gave his speech entitled *ACRES OF DIAMONDS* more than 5,000 times ... and earned enough in this effort to help found Temple University!

Here are summarized versions of THE 3 STORIES in the book that I hope will have a huge IMPACT on your thinking about 'NEW' PROSPECTS.

1. GOLD. In 1847, a man who owned a ranch in Northern California heard that gold had been discovered somewhere in Southern California. He sold his ranch to a Colonel Sutter, and then went south to search for gold and riches, never to return. Colonel Sutter put a mill on that stream. One day, he discovered flakes of gold in the spill off. Sutter's 1849 discovery started the CALIFORNIA GOLD RUSH!
2. DIAMONDS. An old Persian farmer was desperate for riches. He sold his farm, collected his money, left his family and went off in search of diamonds. The man who purchased the farm led his camel into the garden to drink. As the camel put his nose in the shallow water of the garden brook, the new owner saw a flash of brilliance and reached in and pulled out a diamond (in the rough). This discovery became the famous diamond mine of GOLCONDA!
3. OIL. In Pennsylvania, another farmer sold his farm to take a job with his cousin, who was looking for coal oil in Canada. He, too, was searching for wealth in other places. According to the county records, the farmer sold his farm for \$833. The new owner found oil... on that same farm. That oil was eventually worth hundreds of millions of dollars, and this discovery became the PENNSYLVANIA OIL FIELDS!

The Alchemist

Here's one last story on the idea of looking to your closest relationships.

I have given away hundreds of copies of Paulo Coelho's wonderful novel, *THE ALCHEMIST*. This story, powerful in its simplicity and wisdom, is about an Andalusian shepherd boy named Santiago, who travels from his homeland Spain to the Egyptian desert in search of a treasure buried near the pyramids. What starts out as a journey to find 'worldly goods' turns into a written meditation on the 'treasure that is found within'.

The central message of the book, which has inspired people all around the world, is simple. Again, after literally searching all over the world, **Santiago found that what he really wanted was right in front of him all the time!**

This is a pretty powerful lesson for each of us as individuals and our organizations.

*I hope the moral in all of these stories is clear and evident. 'FUNDING YOUR VISION' is usually about your TOP 33 INVESTORS ... and perhaps your BEST 300 QUALIFIED PROSPECTS. Many of these top prospects are most likely sitting **right in front of you ... right now!** (Not literally, but pretty darn close.)

STARTLING STATS

Many organizations actually say to us:

“We don’t have any prospects.”

Let’s deal with that straight up.

If it’s literally TRUE ... then these organizations should **CLOSE THEIR DOORS**.

They should go OUT OF BUSINESS and everyone should move on.

However, based on a literal ton of experience ... I would unequivocally state, without exception, that IF you have a good/great ‘CAUSE’ ... **YOU HAVE QUALIFIED PROSPECTS!!!**

Even better, if you have both a good/great CAUSE and a very good CASE/RATIONALE for support ... I absolutely GUARANTEE that you have QUALIFIED PROSPECTS!!!

Check out these STARTLING STATISTICS! (*Then try and tell me you don’t have any prospects.*)

- **\$100B.** McKinsey study indicated a **\$100 Billion** OPPORTUNITY for the ‘THIRD SECTOR’ to generate ‘INCREMENTAL INCOME’. (That’s ‘over and above’ what you’re doing now.)
 - **\$25 Billion** of that opportunity comes from a focus on MAJOR GIFTS! (Duh?)
 - **\$25 Billion** comes from reducing the COST of FUNDRAISING! (Duh, Duh?)
- **\$100T.** There’s going to be **\$100 Trillion** (give or take a few trillion) of WEALTH TRANSFERRED by BOOMERS in the next 30+ years!!!
- **\$3T.** These same BOOMERS have **\$3 Trillion** a year in INCOME.
- **\$375B.** 50 Million people DOATED \$375B last year in the U.S. alone!!!
- And, there were 35,000 NEW millionaires created last year ... and are over 946 billionaires (‘B’) in the world ... none of whom can take it with them!

“THAR’S MONEY IN THEM THAR HILLS.”

FAQs

Here are the most Frequently Asked Questions tied to Qualified Prospects:

- "Where do we find NEW prospects?"
- "How do we IDENTIFY more Qualified Prospects?"
- "How do we RATE and PRIORITIZE our most Qualified Prospects?"
- "How do we STRATEGIZE our Top Prospects?"
- "How do we get the VISIT (AKA 'appointment')?"
- "How do we know HOW MUCH to ask for?"
- "How do we get our BOARD involved in prospecting?"
- "How do we FOLLOW UP with our prospects?"
- "How do we determine the RELATIONSHIP with our prospects?"
- "What if we don't have a RELATIONSHIP with our prospects?"
- "What if we don't even KNOW our prospects?"
- "Where's the best place to find out INFORMATION about the prospect?"
- "How much RESEARCH should we do?"
- "How important is GIVING HISTORY?"
- "Who should we go to FIRST?"
- "How do we MANAGE our portfolio?"
- "How do we know WHEN to ask?"
- "Should we use 'MOVES MANAGEMENT'?"
- "How do we utilize our DATABASE MANAGEMENT system?"
- "What is CRM? Can it help?"
- "Should we engage in WEALTH SCREENING?"
- "Is it a good strategy to ask a prospect to be on our BOARD?"

What follows is our way to help answer these questions with a **system, action plan, ideas,** and **resources.**

*We encourage you to read through all of this guide for the greatest understanding and RESULTS. If you need HELP contact coach@forimpact.org

THE FOR IMPACT POINT OF VIEW

Before we begin to provide the 'HOW TO' to your 'HOW DO' ... It's important to provide a CONTEXT for the whole idea of PROSPECTING.

We started out with **your BIG QUESTION:**

“WHERE DO WE FIND NEW PROSPECTS?”

I want to pose a different **BIG QUESTION:**

“WHY DO YOU EVEN NEED PROSPECTS???”

My answer is: **42.** (Just kidding. This isn't *THE HITCHHIKER'S GUIDE TO THE UNIVERSE.*)

The real answer is that you need **PEOPLE** to help you **FUND** your **VISION** and increase your **IMPACT!**

Following is a simplified version of our FOR IMPACT POINT OF VIEW built on 3 pretty BIG INSIGHTS.

*Hopefully, you've seen this before. If not, you can go to www.forimpact.org/POV and get the full concept.

*“He who has a WHY to live
can bear with almost any HOW.”*

—Viktor Frankl quoting Nietzsche

Point of View

INSIGHT 1 - IMPACT DRIVES INCOME



IMPACT DRIVES INCOME

(*NOT* the other way around)

The SIZE and SCOPE
of Your

IMPACT

DETERMINES

The SIZE and SCOPE
of Your

INCOME

With all due respect and admiration ...
nobody reading this has **INCOME** that **MATCHES** your **IMPACT**.

The implications here (again) are that your best and most **Qualified Prospects** are **INVOLVED** and **ENGAGED** with you because of your **IMPACT**!

THESE ARE THE PEOPLE YOU ARE LOOKING FOR!!!

They actually understand that your **IMPACT** drives your **INCOME** ... and therefore understand that the more **INCOME** (FUNDING) that you have ... the more **IMPACT** you can have.

INSIGHT 2 - BE FOR IMPACT



STOP defining yourself in the **NEGATIVE!**



BE FOR IMPACT!

Here's a different question, one of those quantum leap, metaphysical, What The 'Bleep' Do We Know? QUESTIONS:

“WHY do we even call ourselves ‘NOT-FOR-PROFIT’???”

The implications of this question and the move from 'Not-For-Profit' to FOR IMPACT should be pretty obvious.

Your best prospects are not interested in the fact that you are 'nonprofit' or that you are a 'charity' or 'tax-exempt'. They don't wake up in the morning and shout:

“Yee-haw! We don't get to make any money today!”

They want to help you with your **IMPACT** ...

They want to **INVEST** in your **CAUSE** ...

They want to help you **FUND YOUR VISION!**

*Please don't gloss over this. It is actually a great ANSWER to many of your QUESTIONS about 'PROSPECTS'!

INSIGHT 3 - JUST ASK



You're In **SALES**.
GET OVER IT.

GO. NOW. **JUST ASK!**

Here are the incredibly simple 'PROSPECT' implications of this insight:

IF ... we're in **SALES** (and we are!)

And, IF ... we need to **JUST ASK** (which we do!)

THEN ... we need PEOPLE (PROSPECTS) to **SELL TO!**

JUST ASK: A SIMPLE STRATEGY

JUST ASK ... For Help

JUST ASK ... For Involvement

JUST ASK ... For Engagement

JUST ASK ... For Feedback

JUST ASK ... For Underwriting

JUST ASK ... For Sponsors

JUST ASK ... Power Questions

JUST ASK ... Transition Questions

JUST ASK ... Any Questions

JUST ASK ... For Impact

***JUST DON'T ASK FOR MONEY!!!**

PRESENT THE OPPORTUNITY ... TO HELP FUND THE VISION.

CHANGE YOUR VOCABULARY

One of the most powerful tools we use in our training and coaching is helping to **CHANGE YOUR VOCABULARY**.

In effect, we need to create an entirely new language and lexicon to help us **IDENTIFY, PRIORITIZE** and **STRATEGIZE** Qualified Prospects.

Here is the highest level of our **CHANGE** in **VOCABULARY**:

OLD THINKING

NOT FOR PROFIT

CHARITY

MISSION STATEMENT

SURVIVAL

INFORM

ON THE BOARD

COMPETITION

CULTIVATION

DONOR/DONATION

'WARM FUZZIES'

SPECIAL EVENTS

TRANSACTIONS

TRADITIONAL CAMPAIGNS

TEXT HEAVY BROCHURES

COLD CALLS

APPOINTMENTS

ASK FOR MONEY

NEW THINKING

FOR IMPACT

PHILANTHROPY

MESSAGE

VISION

INVOLVE

ON BOARD

COLLABORATION

MAXIMIZE RELATIONSHIP (ATGM)

INVESTOR/INVESTMENT

RETURN ON INVESTMENT

MEMORABLE EXPERIENCES

RELATIONSHIPS

FUNDING INITIATIVE

ENGAGEMENT TOOL

PREDISPOSITION

VISITS

PRESENT THE OPPORTUNITY

THE IMPLICATION OF **CHANGING YOUR VOCABULARY** IS PRETTY CLEAR:

Changing the way you **TALK**
helps change the way that you **ACT!!!**

As you look to **IDENTIFY PROSPECTS**, you should be looking for people to '**INVEST**' in your Cause or your Case.

Your absolute best and most **Qualified Prospects** will totally and absolutely gravitate to this concept of '**INVESTMENT**' and '**RETURN ON INVESTMENT**'.

REMEMBER, if they want to '**DONATE**' something ... they can give **blood** or **organs!!!**

P.S. Like any new 'language', the fastest way to make progress is usually '**TOTAL IMMERSION**'.

STOP doing the '**NONPROFIT**', '**CHARITY**', '**SURVIVAL**' thing.

STOP '**COMPETING**' with other '**NON-PROFITS**'.

STOP with the '**SPECIAL EVENTS**' and the '**TRANSACTIONS**'.

STOP any reference whatsoever to '**DONORS**' or '**DONATIONS**'

STOP '**CULTIVATION!!!!**'

STOP '**ASKING FOR MONEY**'!

11 BARRIER-BUSTING IDEAS ON PROSPECTS

11 BARRIER-BUSTING IDEAS ON PROSPECTS

Here are 11 BARRIER-BUSTING, 'THINK BIG' IDEAS to help you in your quest for GREAT PROSPECTS:

- 1. Maximize Relationships**
- 2. Just Visit!**
- 3. More Time With Better Prospects**
- 4. Team Selling**
- 5. 97/3: Focus on the Top!**
- 6. Return On Investment**
- 7. Return On Energy**
- 8. Call Reluctance**
- 9. The \$1M Investor**
- 10. The Last Investor**
- 11. Good Names**

1. Maximize Relationships

No more 'TRANSACTIONS!'

Our goal is always about RELATIONSHIPS. (LIFETIME, if possible.) In fact, the goal of every Development Office and Development Officer (by title or role or responsibility) is to:

MAXIMIZE THE RELATIONSHIP ...
AT THIS GIVEN MOMENT.

*“A RELATIONSHIP is a:
1.) CONTINUING SERIES ...
2.) of COLLABORATIVE INTERACTIONS...
3.) INHERENTLY UNIQUE to the INDIVIDUAL
PARTICIPANT.”*

— Martha Rogers & Don Peppers
The Gurus of 'One-to-One' Enterprises

*“There is only one rule of FINANCIAL SUCCESS:
Know the DIFFERENCE between a
LIABILITY and an ASSET.”*

— Robert T. Kiyosaki, Rich Dad, Poor Dad

*“There is only one rule of FINANCIAL SUCCESS:
Know the DIFFERENCE between a
TRANSACTION and a RELATIONSHIP.”*

— Tom Suddes, Poor Dad, Poor Dad

REMEMBER:

You can't 'MANAGE' a RELATIONSHIP you don't HAVE!
And, you can't 'HAVE' a RELATIONSHIP until you figure out ...
WHO you need to have a RELATIONSHIP with.
(I know, a dangling participle. But you get my point.)

2. Just Visit!

The principle behind the idea of **'MAXIMIZING RELATIONSHIPS'** is: **JUST VISIT!**

Remember the **WARNING!**

If you are not committed to making **'SHOULDER-TO-SHOULDER'** VISITS with your very best prospects ... you're really wasting a lot of time and energy reading or listening to this stuff.

Again, the point is to figure out **WHO** you need to VISIT ... **IN WHAT ORDER...**
WHAT'S THE STRATEGY ... WHO GOES WITH YOU, etc.

3. More Time With Better Prospects

Brian Tracy is one of the top sales trainers and motivational speakers in the world. This is my favorite line from him, especially as it relates to **SALES!!!**

If you truly believe in **'SALES'**, then it becomes pretty obvious that we need to figure **WHO** are these **'BETTER PROSPECTS'** ...

And to make sure that we **'FIND MORE TIME'** to spend with them!!!

4. Team Selling

Team Selling is an amazing concept when applied to **'PROSPECTS'**

Here is another For Impact FRAMEWORK that we think can really help you execute on our Sales-Driven, Top-Down, Predispose-Present-Follow-Up Methodology.

These 3 Concentric Circles represent a great way to look at your organization's **'TALENT'** ... and how it might be most effectively used.

The Blue-Red-Green Team is a great visual, frame and answer re: **'How to Get Visit'**.

- Use your 'Blue' Team to help with **predisposition, open doors**, and even **set up the visit**.
- 'Blue' Team can be engaged **before** the **visit**, **on** the visit or **after** the visit
- 'Blue' Team represents best example of **3 Degrees of Separation**. (Kevin Bacon/6 Degrees actually 2.78. Less than '3 moves' from any other actor.)

Note: In many cases, you are only **1 person** removed from who you want to see.

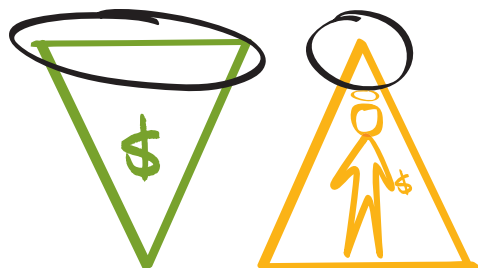
*This is especially true in **Ireland** and **North Dakota**.

- 'Blue' Team **never** goes **alone/solo** on a visit!
*We don't do 'peer-to-peer' solicitation. Just 'trading dollars'. Always a professional staff person engaged on visit.
- 'Red' Team can also help with visits, especially with phone follow-up and call backs.
- 'Green' Team is always the R.M. (Relationship Manager). **No exceptions to this**.
(But doesn't mean they have to be on every visit.)

TEAM SELLING



5. 97/3: Focus on the Top!



97% of all your **INCOME**
(SALES/REVENUE) will come from

3% of your **PROSPECTS**
(Portfolio/Community/Family).

This is a fact. Don't fight it. Deal with it.

97/3 just reinforces the need for finding your **BEST** and most **QUALIFIED PROSPECTS!**

**The whole '80/20, Pareto the Italian Economist thing is soooooo 1980. (Actually, it was in the 18-somethings)*

***BIG IDEA: The Master Prospect List**



'PRIORITIZATION' is the centerpiece of our Prospect system.

The MPL is one of the biggest ideas in our **SALES** and **PROSPECTING** Process. It's a system of **rating** and **ranking** your best and most Qualified Prospects in **DESCENDING ORDER OF IMPORTANCE!!!**

The MPL is not a random group of names nor an alphabetical list! The MPL ranks **ALL** of your prospects, not just 'individuals'.

Here are 3 ways to execute:

1. **RATE & RANK** Your Prospects. (MPL)
2. Assign a **RELATIONSHIP MANAGER**. (Portfolio)
3. Identify **NATURAL PARTNERS**. (Visits)

6. Return On Investment (R.O.I.)

Just a reminder about the **\$100 BILLION OPPORTUNITY**. McKinsey and Company is supposed to be one of the 'best' consulting firms in the world. They had ex-Senator Bill Bradley heading up the 'Not-for-Profit' Division. They've been paid a lot of money from some big nonprofit organizations to do 'studies,' etc.

Their White Paper, **The \$100 BILLION OPPORTUNITY**, talks about *"philanthropic and other nonprofit institutions leaving \$100 Billion on the table!"*

There were five recommendations. (The first was to REDUCE FUNDING COSTS! Duh?) The big idea was around **MAJOR GIFTS**, even though they didn't use that exact wording though.

RETURN ON INVESTMENT, as it relates to prospects, simply reinforces the need to be focused on the very **top** of our prospect list.

Again, this is the most effective way to **raise the most amount of money at the least cost ... thereby gaining the greatest RETURN ON INVESTMENT**.

*This Cost of Fundraising issue is a daunting one for everyone in this field. However **OCCAM'S RAZOR** would lead to one **SIMPLE** conclusion:

'Shoulder-to-Shoulder' visits ... where we Share the Story and Present the Opportunity ... are the most cost effective way to raise THE MOST MONEY/INCOME!

7. Return On Energy (R.O.E.)

Here's a wonderful story to help you understand this principle/concept of RETURN-ON-ENERGY.

LIONS, MICE & ANTELOPES

A lion can actually capture, kill and eat a field mouse.

However, it turns out that the ENERGY expended is greater than the caloric content of the mouse.

If a lion spent his whole day hunting and eating field mice ... it would slowly starve itself to death!

A lion cannot live on mice. Lions need antelope. Antelope are BIG.

While antelope take more speed and strength to capture and kill ... once killed, they provide a huge feast for a lion and its pride.

A lion can live a long and happy life on a diet of antelope. It will die 'chasing mice.'

If you're spending all of your time and energy going after 'field mice', your short-term reward is a feeling of 'ACTIVITY', and maybe even 'ACCOMPLISHMENT'.

However, in the long run, you're going to die.

(This is a story. It's meant to convey an idea. Don't take the whole "kill" or "antelope" thing too literally.)

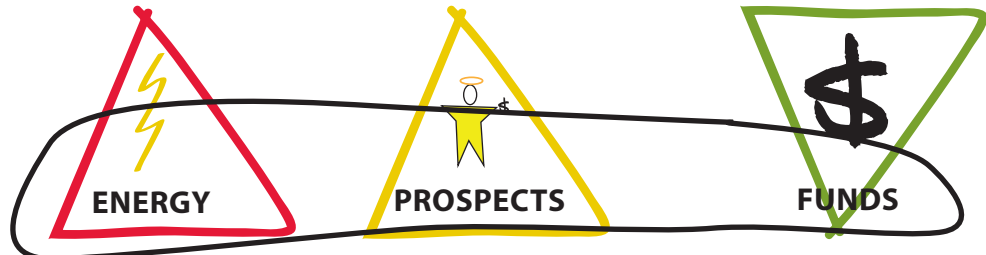
The lesson, as it relates to **QUALIFIED PROSPECTS**, is about spending your day HUNTING ANTELOPE.

Are we going to continue doing 'special events' that aren't 'special', aren't 'events' and are primarily focused on 'MICE'?

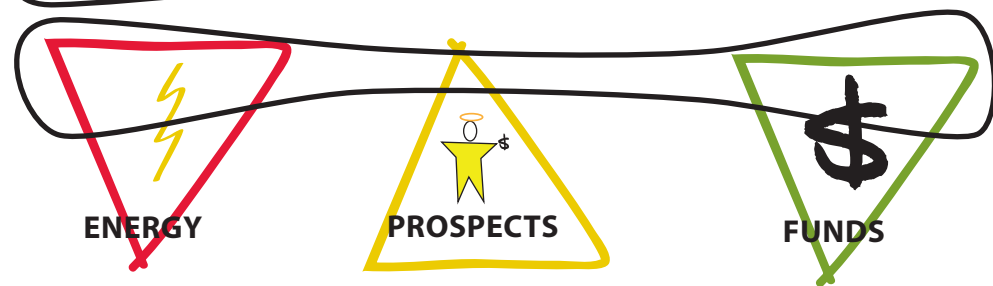
Or, are we going to focus on our very **BEST** and most **QUALIFIED PROSPECTS**?

THE R.O.I./R.O.E./R.O.R

CURRENT:



FUTURE:



Here is a great visual that should help you understand:

- 1.) **R**eturn-**O**n-**I**ntestment
- 2.) **R**eturn-**O**n-**E**nergy
- 3.) **R**eturn-**O**n- **R**elationship

8. Call Reluctance

Why aren't we out **ASKING? SELLING? MAKING MORE VISITS? MAKING MORE PRESENTATIONS?** Why is '**CALL RELUCTANCE**' one of the biggest challenges in all of 'SALES'?

I was once called into a very well known university that was trying to deal with this whole issue of '**CALL RELUCTANCE**.' (It was so bad, in fact, that they had brought in a psychologist for two days! Even then, the staff was still very, very reluctant to actually get out in the field and JUST ASK. The 'psycho-babble' didn't help.) I told the Chancellor I could handle the issue of CALL RELUCTANCE in under 3 minutes (not 2 days). Here's what I told them:

There are 3 main reasons for CALL RELUCTANCE:

1. You don't BELIEVE in what you are 'SELLING'.
2. You cannot ARTICULATE the MESSAGE.
3. You're not sure you are 'selling' to QUALIFIED PROSPECTS

How do you deal with these 3 issues?

1. If you don't believe in what you're selling, you should **change jobs. Today.** Besides the obvious issues about loving what you do, being passionate about your organization, company, service, product or whatever... your 'DIS-BELIEF' will be transparent/obvious to everybody you're with. How are people going to 'buy' from you when they see that you don't believe in what you're '*selling*'???

*Great SALES people sell with ENTHUSIASM. The last four letters are **I.A.S.M.** I.Am.Sold.Myself.

2. Understanding and communicating your message and your story ... Clearly, Concisely, Convincingly, Compellingly, etc ... is YOUR responsibility. **MAKE IT HAPPEN.**
3. This whole idea of being with what you believe is a 'QUALIFIED PROSPECT' is why you are reading this. I hope it helps to simply state that you need to STOP '*cold calling*' and START '*selling*' to those who are able to 'buy'/'invest'.

Note on Fear

Having consulted, coached and trained thousands of For Impact staff, boards and volunteers, I've found that many people's response to 'call reluctance' is tied to the word **FEAR**. **FEAR** of rejection. **FEAR** of the unknown. **FEAR** of the person they're with.

It was Canfield or Hansen who said:

“FEAR is False Expectations Appearing Real.”

Good old FDR said:

“The only thing we have to FEAR is FEAR itself.”

Dr. Phil says something like

“BUILD A BRIDGE ... and then GET OVER IT!”

YOU'RE IN SALES.

SALES is about VISITS.

PRESENTATIONS.

PRESENTING OPPORTUNITIES.

It's not about YOU! It's about your investors or clients or customers. It's about your solution or your vision. It's about the wonderful services and products that you deliver.

Special Note: In over 6,000 one-on-one visits/presentations, I have never been shot. A couple of people tried to take a swing at me, but no blood, no harm, no foul.

9. The \$1M Investor/The \$1M Sale

Frank Sullivan was my first mentor and perhaps the best life insurance salesman in the world at the time. He was also a Trustee at Notre Dame and a friend. One of the most important things I learned from Frank very, very early in my sales/development career was this:

“It’s easier to sell a \$1M life insurance policy
to a QUALIFIED PROSPECT ... than it is to sell a
\$10,000 policy to a RELATIVE!”

This didn’t seem like much at the time. Over the years, it’s been huge!

CAPACITY and RELATIONSHIP are the two key components of a qualified prospect. RELATIONSHIP is great (and I’m not talking about ‘relatives’) but CAPACITY is a given mandate. A deal breaker when it comes down to TOP PROSPECTS.

10. The Last Investor (* THE LAST CUSTOMER/CLIENT)

This is a metaphor that might just be the break you need to make a 'Quantum Leap' in your **PROSPECT STRATEGY**.

WHAT IF ... you were down to your very **LAST INVESTOR** (aka 'Donor')

WHAT IF ... the fate and future of your ORGANIZATION and CAUSE were entirely up to one **LAST INVESTOR**?

Think about it:

IF ... you convince them of your vision ... communicate your Impact and mission ... involve them in your leadership process...

THEN ... they will MAXIMIZE their INVESTMENT ... and bring along OTHERS to COMMIT and INVEST.

HOWEVER ... if they don't 'GET IT' ... They're history. They're gone.

If you can't communicate your *MESSAGE* in a clear, concise and compelling fashion (consistently), then they will be polite, but still gone.

The proverbial bottom line is simple:

If you present to **THE LAST INVESTOR ...** and **THEY DON'T INVEST ...**
You are '**OUT OF BUSINESS**'.

CHALLENGE: How can you use this metaphor of **LAST INVESTOR** to change the way you approach your best PROSPECTS?

How would you strategize, research, predispose, engage, follow-up with THE LAST INVESTOR (or * THE LAST CUSTOMER/CLIENT)?

* This metaphor also works as THE LAST CUSTOMER/CLIENT for those in high-end sales. How would you treat THE LAST CUSTOMER/CLIENT?
(With TLC I hope 😊)

11. Good Names

Frank Sullivan must have written his book *THE CRITICAL PATH TO SALES SUCCESS* just for me. It is filled with wonderful ideas and lessons, not just on sales/business, but on life. Here are 3 nuggets:

1. Create a **profile** of what your **\$1M PROSPECT** looks like (We'll cover that under **Ideal Profile**.)
2. You'll never make a \$1M 'SALE' unless you make a \$1M 'ASK'!
Again, please don't read any further if all you're going to do is sit around for months and come up with names and do research, etc. You're only allowed to continue reading IF you're actually going to get out and **JUST VISIT/JUST ASK!
3. You must RATE all of your prospects, so you can see who is on the 'top', and deal with them accordingly. (We'll go deeper our Master Prospect List.)

Frank had five activities that every salesman must perform, in order of importance.

1. Establish goals.
2. **GET GOOD NAMES(!)**
3. Make the approach.
4. Make the presentation.
5. Make the customer a client.

His #2 Activity says it all: **GET GOOD NAMES!!!**

***Now you can see why Frank was a master at selling, not just life insurance, but Notre Dame and everything else. Although I've revised my own 'sales system' and the For Impact Sales Process many times over the years, I can still go back to Frank's '5 Steps' and tie much of what I've done back to these activities.*

DEFINITIONS

DEFINITION: **QUALIFIED PROSPECT**

Let's take a moment to actually *define* a '**QUALIFIED**' **PROSPECT**!

In Daniel Webster's world,

QUALIFIED means: "Meeting the proper standards and requirements."

PROSPECT means: "A potential or likely customer or client."

In the **FOR IMPACT WORLD**, the words '**QUALIFIED**' and '**PROSPECT**' mean:

**A POTENTIAL INVESTOR...
who has both
CAPACITY and RELATIONSHIP!!!**

**Just "breathing" is not a qualifier!!!*

DEFINITION: **CAPACITY**

'**CAPACITY**' means exactly what it says:

The **FINANCIAL CAPACITY** to make a significant
INVESTMENT in your **CAUSE** or your **CASE**.

CAPACITY can be a function of **INCOME**, **ASSETS** or **ESTATE**, but it has nothing to do with how much you 'think' they will give! It's what they could give if they wanted to! (Assuming you have a great **PRESENTATION**!)

Special Note: Explaining **CAPACITY** doesn't need a lot of words/space, but I don't want to be 'wishy-washy' on this.

'NICE PEOPLE' with NO CAPACITY (\$)...
are NOT QUALIFIED PROSPECTS!!!

This doesn't make them 'bad' people. It just keeps them **off your Master Prospect List**.

DEFINITION: **RELATIONSHIP**

I've spent a lot of 'real time' with 'real people' in the 'real world'. I'm amazed at how many times I've heard this:

*"We don't 'ASK' ...because we don't have a **RELATIONSHIP**!"*

This '**ASSUMPTION**' leads to a lot of '**BAD STUFF**'; including '**CULTIVATION**' (spreading manure on plants), '**MULTIPLE APPOINTMENTS**' (with NO ASK), '**RELUCTANCE TO EVEN MEET**'; (you can't present if you don't show up), etc.

'RELATIONSHIP' in our world means a relationship with:

The CAUSE	The PRIORITY	The COMMUNITY
The CASE	The PROGRAM	The REGION
The ORGANIZATION	The PROJECT	The PEOPLE

The more I think about this, the more I realize these people are using two very wrong concepts to define the **RELATIONSHIP**: '**GIFT HISTORY**' and '**PERSONAL RELATIONSHIP**'.

Many (most?) organizations define *RELATIONSHIP* (especially as it relates to Qualified Prospects) by **GIFT HISTORY**! (in business terms, this would be **PREVIOUS PURCHASES**)

GIFT HISTORY has **NOTHING** to do with **RELATIONSHIPS**!

(Please read this 3 times... spin around... and read again!)

The **GIFT HISTORY** only conveys the **current** response to the **current** method of presenting the opportunity. It gives no indication of the true relationship, nor conveys the funding **potential**!

The other really big *RELATIONSHIP* misunderstanding is around the Qualified Prospect having a '**PERSONAL**' relationship or '**PERSONAL**' contact with the organization.

This is not about the RELATIONSHIP to 'SOMEONE.' (Again, it's not about you.)

It's the (in many cases obvious) **RELATIONSHIP** to the **CAUSE** or the **CASE**.

DEFINITION: **CAUSE AND CASE**

I've spent a lot of 'real time' with 'real people' in the 'real world'. I'm amazed at how many times I've heard this:

*"We don't 'ASK' ...because we don't have a **RELATIONSHIP!**"*

This 'ASSUMPTION' leads to a lot of 'BAD STUFF':

"**CULTIVATION**" (spreading manure on people), "**MULTIPLE APPOINTMENTS**" (with NO ASK), "**RELUCTANCE TO EVEN MEET**," (you can't present if you don't show up), etc.

'RELATIONSHIP' in our world means a RELATIONSHIP with:

The CAUSE

The CASE

The ORGANIZATION

The most important 'RELATIONSHIP' is the one with either your 'CAUSE' or your 'CASE' (or, ideally, BOTH!). This 'CAUSE/CASE' is a really, really, really BIG IDEA. It can help change the way you IDENTIFY and PRIORITIZE your prospects. **Pay attention.**

THE 'CAUSE'

Here are some big 'CAUSES':

- 'homelessness'
- 'kids'
- 'alzheimer's'
- 'college access'
- 'poverty'
- 'education'
- 'lung disease'
- 'youth development'
- 'domestic violence'
- 'environment'
- 'cancer'
- etc.

The 'CAUSE' is not about you or your organization.

It's about the BIG PICTURE ... the VISION ... the PROBLEM ... or the CHALLENGE.

Special Note: This 'CAUSE' thing is a very big deal. It allows you to think way outside the 'box' of who you know, who knows you, who's giving to you now, etc.

*This idea has helped hundreds of organizations bring 'NEW' prospects and investors to the proverbial table.

THE 'CASE'

**The CASE, on the other hand, is about ...
YOUR ORGANIZATION. YOUR SOLUTION. YOUR SERVICES.**

Your 'CASE' is the FUNDING RATIONALE ... of your SOLUTION, SERVICE, or IMPACT.

The 'CASE' is where you explain your message, your priorities, your distinguishing characteristics, and more about your organization. Ideally, anybody who is directly involved with your 'CASE'/ORGANIZATION ... is also highly likely to have a strong relationship with your 'CAUSE'.

EXAMPLES: **CAUSE AND CASE**

Let me give you 3 quick, specific examples as they relate to '**CAUSE**'/'**CASE**.'

EXAMPLE: 1

If you are a **EDUCATIONAL INSTITUTION** (school) and you have a prospect who is an *ALUM* or a *PARENT* (past or present) ... then they have a **RELATIONSHIP**.

Their '**PERSONAL**' relationship with staff, or how many time they've been back to campus, or whatever is not relevant!

They do NOT need 'CULTIVATION' ... they need a PRESENTATION!

EXAMPLE: 2

If you are doing anything that has an **IMPACT** on your **COMMUNITY**, be it social service, economic development, education or leadership ... then ANY '**COMMUNITY LEADER**' is a good prospect! **They will understand the 'CAUSE'**.

You simply need to help them understand the CASE FOR SUPPORT (your organization).

EXAMPLE: 3

Let's say you're working in the area of **CANCER**. Then, literally, everyone is a '**PROSPECT**!' Why? Because every one of us has been or will be 'touched' by **CANCER** ... personally, or within our family, friends or business acquaintances. (Many of us also have a strong likelihood of getting the big 'C' ourselves.)

To narrow down this huge pool to better Qualified Prospects, you would **look for 'SURVIVORS' or for those who have had a close family member 'touched by cancer.'** Then, you make your '**CASE**' to prospects with a very strong **RELATIONSHIP** to the **CAUSE**.

ACTION PLAN:

IDENTIFY, PRIORITIZE, STRATEGIZE

In our For Impact Sales Process, there are 3 very important components within PREPARATION.

1. The **CASE** (**'WHY'** You Are SELLING!)
2. **PRESENTATION DESIGN** (**'HOW'** You Are SELLING)
3. **QUALIFIED PROSPECTS** (**'WHO'** You are SELLING TO ...)

In working with thousands of nonprofit organizations, we have found that the BIG issues around **QUALIFIED PROSPECTS** are really a function of not having a SIMPLE SYSTEM to help you know what to do and how to do it.

Here are the 3 big steps ... the 3 most important things you need to do when it comes to a **QUALIFIED PROSPECT ACTION PLAN**:

1. **IDENTIFY**
2. **PRIORITIZE**
3. **STRATEGIZE**

MY GUARANTEE

We are going to go deeper into each of these action steps, but I am going to **GUARANTEE** that if you:

IDENTIFY a pool of very good prospects ...

PRIORITIZE those prospects top down ...

STRATEGIZE each of your best prospects ...

You will take the proverbial 'QUANTUM LEAP' ... in your **FUNDING** and your **INCOME!**

HOW TO

IDENTIFY, PRIORITIZE, STRATEGIZE

IDENTIFY Prospects: 6 SOURCES

1. LOW-HANGING FRUIT
2. REFERRALS
3. IDEAL PROFILES
4. THE MAGIC FORMULA
5. TARGET SECTORS
6. WOMEN RULE

PRIORITIZE Prospects: 3 MANDATES

1. RATE/RANK
2. ASSIGN RELATIONSHIP MANAGER
3. FIND A NATURAL PARTNER

STRATEGIZE Prospects: 3 CHECKLISTS

1. KNOWLEDGE BASE
2. PROSPECT STRATEGY CHECKLIST
3. VISIT CHECKLIST

IDENTIFY

THE BIG IDEA: Specific Sources And Screening

It doesn't make a lot of sense to sit down by yourself or with a small group of people and begin going through an 'alphabetical list' of 10,000 names! *(You might as well just start looking through the phone book.)*

Establish a **SYSTEMATIC SCREENING PROCESS** to produce a legitimate 'POOL' of PROSPECTS (or, as some people call them, 'SUSPECTS'). To create your best group of **QUALIFIED PROSPECTS**, you need to pull together 'NAMES' from as many SOURCES as possible.

In 'Prospecting for Dummies' language, you are trying to **BUILD** the best **LIST** of **NAMES** in order to **SCREEN** and **RATE** your best prospects.

Following are 6 SOURCES you can use to accelerate PROSPECTING:

1. LOW-HANGING FRUIT

Remember: **GOLD, DIAMONDS, OIL!**

Mixing metaphors, the reference here is Qualified Prospects that are 'easy to pick'!!

ACTION: Go to your D-Base Manager, eTapestry, Raiser's Edge, Banner or whatever ... and ask 'Hal' to spit out these lists:

- A Top Down Current (Annual Giving) List.
- A Top Down Cumulative (HISTORICAL GIVING) List.

These 'lists' give you a great place to start with those who are already giving!!

Although we've already covered why 'GIFT HISTORY' is not the best way to view prospects, this concept of '**low-hanging fruit**' suggests it doesn't make much sense to NOT visit/present/ask our best 'GIVERS'!!! Hence the 'TOP DOWN' nature of the lists.

*I've seen these lists NOT include gifts/investments of \$1M and more ... because they were Planned (Estate) Gifts!!! These INVESTORS should have been near the TOP of the list. Instead, they weren't even ON the list!!!

2. REFERRALS

REFERRALS are the Absolute Best (No Brainer) SOURCE of your most **QUALIFIED PROSPECTS!** When a CHAMPION or CURRENT INVESTOR tells you that someone is a 'GOOD PROSPECT', don't ask a lot of questions... just put them on your PROSPECT LIST!!!

*Obviously, you should get as much information about the referral (prospect) from the referring source to help you with the STRATEGY.

Here some thoughts on REFERRALS.

💡 Make a PLEDGE to yourself that you will never, ever, ever leave PROSPECT or a VISIT without asking for REFERRALS!

*Here's a great tip. Simply ask:

“Do you know of other people LIKE YOU who believe in what we do ... or who are interested in this Cause???”

💡 For LEVERAGE, MOMENTUM and MEMBERSHIP (in your Leadership Societies or giving programs), you just can't beat the whole concept of REFERRALS.

*Another tip: Simply ask:

“Are there others who can JOIN YOU in the President's Circle or Legacy Society or Leadership Program???”

💡 From the *ONE MINUTE SALES PERSON:*

*“After I sell on purpose, people feel good about what they bought and about themselves.
And so they give me invaluable REFERRALS.”*

Think about this. If we really are meeting with great prospects who ultimately INVEST in what we do... they really do feel good about themselves and about their 'INVESTMENT'. ALL of them should not just be willing but excited to share names (REFERRALS) with you.

Special Note: That does not mean that every one of them wants you to 'USE THEIR NAME!' Again, you can simply ask:

*“Would you be willing to help with this (REFERRAL)?
Can I use your name?
Would you send a pre-disposition note to help set up the visit?”*

3. IDEAL PROFILE(S)

Who is Your Ideal Prospect/Investor/Customer/Client

I'm absolutely stunned, amazed and flabbergasted that so very few organizations and sales teams actually take the time to define what their '**IDEAL PROSPECT**' looks like! (This is just as true in the 'FOR PROFIT' world as it is in the 'NOT FOR PROFIT' sector.)

IDEAL PROFILE is one of the most powerful TOOLS that we use during our IDENTIFICATION PROCESS.

Don't blow by this one. It has created many, many 'MILLION DOLLAR' PROSPECTS ... and INVESTORS.

Here's the concept: if you can actually come up with a PROFILE of your BEST PROSPECT/ INVESTOR/CUSTOMER/CLIENT ... then you simply have to **MATCH this IDEAL PROFILE with REAL PEOPLE!**

In essence, this IDEAL PROFILE would be a simple 'list' of absolute best characteristics of your **PERFECT (IDEAL) PROSPECT**. In the For Impact world this might include:

- Unlimited Capacity
- Commitment To The Cause (Kids, Education, Health Care, Cancer, Workforce Development, Disadvantaged, Etc.)
- Engaged In The Case (Your Organization, Your Solution)
- Geographically Impacted
- Interest/Connection To The Priorities, Programs Or Projects

Note: You can come up with more than one 'ideal' profile. For example, for a Campaign, for a transformational gift, for a legacy commitment, for President's circle etc.

MY OWN PERSONAL IDEAL PROFILE

This '**PROFILE**' works for me in almost every situation and organization:

- Someone who is ready to move from SUCCESS to SIGNIFICANCE!
- Someone who has had the 'Bill Gates-in-the-shower' epiphany ("I can't take all of this with me").
- Somebody who has been very 'successful' financially in the business world and who is now committed to making an IMPACT on the world. He or she has already taken care of their family and their own needs, as well as their 'wants.' There is still plenty left.

Special Note: Taking this a little deeper, my very best Ideal Prospect is someone who has actually moved from STRUGGLE to SUCCESS to SIGNIFICANCE! For me, that means a WEALTHY ENTREPRENEUR!

They know what it's like to start things ... to overcome obstacles ... to make a difference. Plus, there's no 'committees'! (They can make a decision. This is my 'favorite' prospect!)

EXAMPLES

EDUCATION IDEAL PROFILE

Any school should be looking (ideally) for:

- A Very Wealthy Alum
- Also, A Current Parent
- Also, A Current Board Member
- Also With A Significant Gift History!

(Trust me. If you've got somebody who fits this profile, and you're a school... you need to go visit with them tomorrow!)

COMMUNITY IDEAL PROFILE

If you have a great Cause or Case that impacts your Community, you might be looking for the **BIG 'C'** IDEAL PROFILE: A Current, Committed, Champion who is Connected to the Cause, the Case and the Community (with large sums of Cash/Currency).

A SOCIAL SERVICE OR HEALTH CARE IDEAL PROFILE

It would be great to visit with:

- A Very Wealthy Survivor (of Cancer, AIDS, etc.) ...
- Or A Parent or Child of a Survivor ...
- Who wants to Impact Others
- And, through you, can help Save Lives, Reduce the Incidence of the Disease and Improve the Quality of Life of Those Touched.

ENDOWMENT IDEAL PROFILE

(‘Legacy’ Profile) Any organization looking to increase their ENDOWMENT needs to look for the IDEAL ‘LEGACY’ PROFILE ...

- An Older Person or Couple (65+)
- With Significant Resources/Assets ...
- Connected to your Cause and your Case ...
- And Willing to consider a Legacy/Planned Gift.

Special, Special Note: Using this ideal profile technique works great with your BOARD! It’s specific. Simple. Successful. And, it beats the daylight out of ‘give us names.’ (How’s that working for you?)

To help you understand this further, here are some examples from the PRIVATE SECTOR:

A LIFE INSURANCE IDEAL PROFILE

Someone who has just had a dramatic change in their circumstances (marriage, new child, new business) and significant ‘protection’ issues. Even better is an entrepreneur or ‘key man’ in a business partnership who need ‘buy-out’ protection.

NETWORK MARKETING IDEAL PROFILE

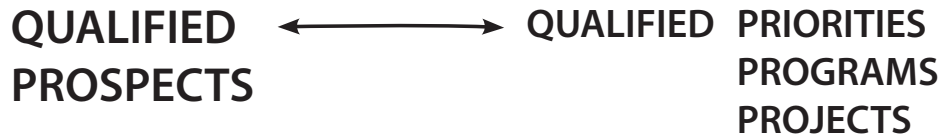
Someone with a passionate interest in independence and financial freedom, a strong commitment to family, a sales or entrepreneurial background, and major frustration with their current situation.

ATHLETIC CLUB IDEAL PROFILE

Great prospects would be committed to changing their lifestyle, know they need a program and help, and realize that the quality of their life is a function of their health.

4. THE MAGIC FORMULA: QP \longleftrightarrow QP³

I call this formula 'MAGIC' because it has 'magically' produced some amazing 'new' names/prospects ... that have turned into big-time investors!!



Here's the TRANSLATION:



The 'arrow' from 'QP' towards 'QP³' means that when we are on a visit with our Best Prospects we are ASKING THEM to help pick the AREA OF INTEREST!

For us, that question is almost always tied to the 3 'BUCKETS' or the 3 CIRCLES that represent the priorities of the particular initiative, e.g. People, Program & Place; Research, Education & Service; etc.

We simply ask: *"Which one of these is most important to you?"*



The 'arrow' going the other way (from QP³ to QP) is the real 'MAGIC' for more and better prospects!

The idea here is to take a particular **Program, Project** or **Priority** (a building project, a 'Green' initiative, a new treatment program, high-level training of your best people, etc.) ... and actually generate names of prospects or potential investors who are 'connected' to the 'QP³'! The beauty of this is that they may not be RELATED (Relationship) to your Cause or your Case at the moment ... but because they have a specific interest in this Program, Project or Priority ... they become potential PROSPECTS!!!

Here are some examples:

- You do great work with KIDS. You need help at your CAMP. There are a number of BUILDING PROJECTS. And, you'd like to be more GREEN. You would then look to find entrepreneurial contractors, with kids, who have an environmental focus and who might be willing to help with that project.
- You have an opportunity to create a NATIONAL MODEL within your specific CAUSE (Homelessness, Domestic Violence, Autism, etc.) You would then look for a NATIONAL FOUNDATION who is already committed towards this particular Cause (but may know nothing about you or your organization or your Case).
- Perhaps you need more TRAINING for YOUR PEOPLE. You could talk to training companies or training departments within large companies.
- New Kitchen Area? Restaurants. New Science Lab? Engineering Firms, Pharmaceutical Companies, etc. And on and on and on.

Special Note: The best way to make this work is to simply LIST all of your PRIORITIES, PROGRAMS and PROJECTS ... and then **brainstorm *who* would fit/be** interested in those QP³!!!

5. TARGET SECTORS

The idea here is to specifically look at sectors that 'FIT' your CAUSE and/or your CASE.

Some examples:

- If you're a social entrepreneur with a new and better way to provide a social service, you should target WEALTHY ENTREPRENEURS in your community. ('Like-Kind' Thinking)
- A critical community project in education, such as a College Access Program, should look to high-profile, wealthy COMMUNITY LEADERS ... who know that education, dropout rates, graduation rates, etc. are critical community issues.
- A high school or college obviously needs to target their ALUMNI and CURRENT PARENTS.
- A large health organization can target a list of people who have participated in their SIGNATURE EVENT (Race for the Cure, Relay for Life, etc.)

Special Note on WEALTH SCREENING: I'm fine with this in concept if you are a large enough For Impact organization and this will help you 'screen' your alumni or database. Remember that 'WEALTH SCREENING' is simply a way to help you with the CAPACITY issue. It does not help with relationship or willingness or anything else!

6. WOMEN RULE!!!

SPECIAL NOTE: PAY ATTENTION!

As you review particular target sectors or sources of potential prospects... I beg, plead, and implore you to specifically focus on WOMEN as potential prospects.

Not only do **WOMEN RULE**, but they are the ones who are going to end up with over \$100 TRILLION in the next 30 years! (Primarily because they are going to outlive their spouses.) Focusing some much needed attention on this WOMEN'S SECTOR will set you apart immediately and provide a terrific SOURCE of Qualified Prospects!

Special Note: I told the Lion, Mice and Antelope story to a large training group a few days ago. A lady came up and told me that while the story was very meaningful and that she 'got it'... but the 'facts' were wrong! And she was right! The 'LION' doesn't really hunt for anything (mice or antelope). He lays around under the 'lion tree' waiting for a 'lion beer' watching 'lion TV'!!! The LIONESS does all the hunting for the family! As always, **WOMEN RULE!**

Some things to think about regarding WOMEN & PHILANTHROPY:

1. How do you integrate this market into your vision and your plan?
2. Where do you find these qualified (women) prospects?
3. How do you build relationships within this market?

As you answer these questions for yourself, it should reinforce the need for looking to WOMEN as a big source of Qualified Prospects!!

WOMEN RULE: STARTLING STATS

- **43%** of Americans with assets greater than \$500,000 are **women!!!**
- **Women** own **60%** of all assets in the U.S.!!!
- **Women**-owned businesses total nearly **8 MILLION!!** (vs. 400,000 25 years ago); and post **\$2.3 trillion** in annual sales!
- This year, **50%** of all small businesses will be **woman** owned.
- More than half of the new jobs created in this country since 1992 are attributed to **women**-owned businesses!
- **Women** control over half of commercial and consumer consumption.
- American **women** ... by themselves ... are in effect the **largest** “national” economy on earth!!!
- **Women** control about **80%** of household spending and, using their own resources, make up **47%** of investors.
- **Women** buy **81%** of all products and services, buy **75%** of all over-the-counter medications, make **81%** of retail purchases, and buy **82%** of groceries.
- **80%** of the checks written in the United States are signed by **women**.
- **40%** of all business travelers are **women**; they are responsible for **61%** of all travel and consumer-electronics purchases.
- **Women** influence **85%** of all automobiles purchased.
- They also head **50%** of all U.S. households with incomes over \$600,000 and own roughly **66%** of all home-based businesses.
- **Women** have been the majority of voters in this country since 1964.
- **30%** of **women** (10.2M) out earn their husbands (in a dual income family).
- In the last 30 years, **women’s** incomes have soared **63%** ... where the men have barely budged.
- The number of **women** earning **\$100,000** or more has tripled in the last 10 years.

Sooo ... who do we currently visit/ask? MEN!!!

PRIORITIZE

THE BIG IDEA: THE MASTER PROSPECT LIST

The second big action step is all about **PRIORITIZE** ... who should get our ATTENTION and FOCUS?!

The really big idea here is the **The Master Prospect List!** The **MPL** is one of the most critical pieces of the SALE PROCESS!

- The Master Prospect List is a way of rating and ranking your best and most Qualified Prospects in **Descending Order of Importance!** (That's DOI vs. DOA. It's not a 'hit list'!)
- The Master Prospect list rates your ENTIRE group of prospects. It is not 'silo' based. It includes individuals, corporations, foundations. It includes Campaigns, Annual Giving, Planned Giving, etc.
- **Every Organization needs one MPL!**
- It can then be broken down into smaller MPL's for projects or portfolios.
- It's not a random group of names jotted down on scraps of paper!
- It's not an 'alphabetical list' of your best donors and potential prospects. (Think about it. If Joe Zcibowitzx is your best prospect ... you'll never see him! Because he's at the end of your list and you'll be working on the M's or the N's in December and then start over on the A's!)
- The MPL is about BEST EFFORT! It's not a science; it's an art! Don't worry about it being perfect. It's a living, breathing, moving, changing document and action plan.

*“Are you in ‘EARNEST’??? SEIZE this very minute!
BOLDNESS has genius, power and magic in it.
Only ENGAGE ... and then the mind grows heated.
BEGIN IT, and then the work will be COMPLETED!”*

— Johann Wolfgang Von Goethe

BEGIN IT! AND THE WORK (MASTER PROSPECT LIST) WILL BE COMPLETED!

Special Note: on MPL: QUALIFIED PROSPECT INDEX (QPI)

We have built a system to help in this RATING process. We called it our **QPI** or **Qualified Prospect Index**. We have set up a simple spreadsheet around six categories ... and weighted each category in terms of its relative importance (at least to us).

Here are our categories. (Hopefully, the type-size helps you with weight/value!)

1. **CAPACITY** as a specific function of FINANCIAL RESOURCES from INCOME, ASSETS or ESTATE. A gentle reminder: This is not how much you think they will give. It's what they COULD give if they wanted to!
2. **RELATIONSHIP**, again, is to either the Cause, the Case, your Organization, or your Priorities, Programs and Projects.
3. **GIFT HISTORY** is their giving to your organization (Case). Again, it is what it is. Your best prospects may or may not have given. Most likely, they have given exactly what you asked!
4. **'OTHER GIFTS'** is about their philanthropic history to OTHER Causes and Cases, which will help you understand their philanthropic interest, as well as their giving capacity.
5. **TIMING** is pretty self-explanatory. Where is this particular prospect in the cycle of life (kids, kids in college, business, moving from success to significance); the cycle of their relationship with the organization (former Board member, just coming on the Board, new Leadership Society Member, etc.)

Special Note: I would encourage you to rate (err) on the side of aggressively Presenting the Opportunity ... soon! (Example: Just because someone has made a five-year commitment to your organization/campaign certainly doesn't mean that you need to wait five years before you can go back and ask!)

6. **GUT** is where you simply look at the person/prospect's name RELATIVE to other people and prospects ... and then go with your 'GUT'.

3 MANDATES (To Make MPL Work)

If you can accept the concept of the MPL as one of the BIG IDEAS in the For Impact Sales Process, and PRIORITIZATION as the centerpiece of the QUALIFIED PROSPECT System, then here are 3 ways to execute:

1. RATE/RANK your prospects.
2. Assign a RELATIONSHIP MANAGER.
3. Identify NATURAL PARTNERS.

We've IDENTIFIED, now we're PRIORITIZING, Then we'll STRATEGIZE. Then you need to **VISIT! PRESENT! MAXIMIZE!**

1. RATE/RANK

In order to create your TOP DOWN, DESCENDING ORDER OF IMPORTANCE **MASTER PROSPECT LIST**, you obviously need to RATE AND **RANK** your pool of identified prospects!

The key is a systematic process or framework based on RELATIVITY. Remember. You're trying to create a MASTER PROSPECT LIST that creates a clear picture of your PROSPECT PRIORITIES.

It is not about 'ALGORITHM'. It's all about the ACT of actually sitting down and figuring out a way to assign a 'NUMBER' and a 'VALUE' within specific categories.

2. ASSIGN A RELATIONSHIP MANAGER

It's super important to assign a Relationship Manager to all of your TOP PROSPECTS.

The R.M. needs to utilize the total resources of the team to nurture this relationship through a series of NATURAL CLOSES! (ASKS!!!) The CLOSER we become to our investors ... the stronger our ability to MAXIMIZE their willingness to financially IMPACT our Vision and Mission.

We know this means that they both need and want to be presented the OPPORTUNITY ... so we will ASK!

As the RELATIONSHIP MANAGER, *“If it is to be...it's up to me!”*

- A Relationship Manager is ALWAYS a staff person!
- A Relationship Manager IS only one set of 'initials'! (You cannot 'split' a prospect!)
- A Relationship Manager's job is to **manage the relationship!!!** (Duh!)
- A Relationship Manager is action-oriented!
- A Relationship Manager actually manages the strategy to MAXIMIZE the relationship!
- A Relationship Manager should be assigned to every one of your Top 100 Prospects ... at minimum

*Every seasoned development professional has heard of the handwritten thank you note from a Relationship Manager for even something as small as \$100 gift becoming a catalyst for a six or even seven-figure investment!!!

3. FIND A NATURAL PARTNER

A **NATURAL PARTNER** is someone **within or outside** your organization... who has a **strong relationship** with your organization ... and an **existing relationship** with this prospect! (Or a reason to believe one can be established quickly!)

Externally, Natural Partners can be on your Board. They can have a business relationship with the prospect. They can be members of the same club or organization. They can be fellow community leaders, etc.

Internally, the **NATURAL PARTNER** can be anyone from the President, Executive Director or top senior leadership ... to a local staff person who has a great relationship with the prospect.

Tip: It's important that you determine the **difference** between a RELATIONSHIP MANAGER and a NATURAL PARTNER. The RELATIONSHIP MANAGER does not necessarily have to have an existing relationship with the prospect. Their job is to do exactly what it says ... **MANAGE THE RELATIONSHIP.**

The NATURAL PARTNER must have an existing relationship, or the ability to create one immediately.

ORDER OF VISITS: 'MO-CO' – 'CO-CO' – 'LEAD-CO'

Deciding the ORDER of WHO you're going to see is a big part of PRIORITIZE. It's also very different from simply starting at the top of your Master Prospect List and working your way down.

Begin like Archimedes on his best day by trying to LEVERAGE your commitments ... building on each previous visit and commitment as you move along.

Here's one way to look at this: 'MO-CO's,' 'CO-CO's' and LEAD-CO's':

- **MO-CO's** are MOMENTUM COMMITMENTS. These commitments are not necessarily about magnitude or size but rather 'COMMENSURATE' ... 'SURPRISE' ... and 'STRETCH'.

These are the 'EARLY ADOPTERS' who get it, buy in, and provide the MOMENTUM to get going.

In a *GOOD TO GREAT*/Jim Collins' world, we would call these 'FLYWHEEL' commitments. In order to get a FLYWHEEL moving, it takes a lot of energy at the beginning ... but once there is some 'MOMENTUM' ... the wheel flies!

- **LEAD-CO's** are about LEADERSHIP COMMITMENTS that literally TRANSFORM the organization or the project or the campaign. These are 'Top of the Pyramid' lead gifts that create a sense of *"We can do this."* Many times they prove that our best prospects/investors have 'stepped up,' and now it's up to the rest of us.

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'LEADERS LEAD.' My friend Bob Werner's words. My emphasis. (Bob is a big time Mensch and Jewish philanthropic superstar.) Success (or failure) is a direct result of LEADERS LEADING. IF no one steps up as the INTERNAL leader, a campaign is doomed from the get go. If you can't find at least one EXTERNAL leader (CHAMPION), it ain't gonna happen either. (My preference is 3 CHAMPIONS). '

LEADERS LEAD.' Boards, committees, staffs, constituents, stakeholders FOLLOW.

Fuel to this fire: Jim Yoder, my friend since college and a Suddes Group partner for 20 years, says it this way:

***"The key to a successful campaign is the
PERFORMANCE of the campaign LEADERSHIP."***

If leaders are not **ENGAGED** and **PASSIONATE** ... then it becomes 'The Suddes Group Campaign' or 'The Executive Director's Campaign', etc.

Tom Mucks, another successful former Suddes Group partner, says, simply:

***"Passion and commitment from LEADERSHIP
will overcome all obstacles."***

- **CO-CO'S** are CONNECTOR COMMITMENTS. Going after some of your most important 'CONNECTORS' early on is a terrific strategy to not only get their financial commitment (which may or may not be significant) but also to generate REFERRALS and STRATEGY on getting visits with your best prospects.

ORDER OF VISIT ACTION:

To help you with **order of visits**, I would suggest you start with your 'LOW-HANGING FRUIT' and 'CHAMPIONS' as you execute on the MO-CO, CO-CO, LEAD-CO strategy. They may be #4, #7, #13 or whatever on your Master Prospect List, but prioritize them differently than your MPL!

The goal with this group is to:

- TEST THE MESSAGE ...
- SHARE THE PURPOSE, PRIORITY and PLANS and ...
- **GET COMMITMENTS!!!**

Remember, the LEAD Commitments and MOMENTUM Commitments are TRANSFORMATIONAL. They aren't just about the IMPACT ... but that they bring others 'to the table' at the highest levels of investment.

TIP: If you can, simply use the 'HANDFUL OF PEOPLE' close:

*“You are one of a HANDFUL OF PEOPLE
who can make this vision (dream) a reality.
I promise you that, with your leadership support,
we can make this goal.
I will commit to making the rest of these presentations...
and we would love to have your LEADERSHIP
COMMITMENT for MOMENTUM,
LEVERAGE and MOTIVATION.”*

3° OF SEPARATION

Remember you are only **3°** away from any QUALIFIED PROSPECT!!

(Please note the term 'QUALIFIED PROSPECT'!)

Forget Kevin Bacon and his 6°. It's actually been determined it's 2.78 'moves'/connections between Bacon and all other actors.

These CONNECTORS and other NATURAL PARTNERS allow you to be one or two CONTACTS away from your best prospects.

This is very, very important to you. Realizing you are only 3° away from ANYBODY who is a QUALIFIED PROSPECT lets you use your NATURAL PARTNERS (Champions, Board Members, Key Volunteer Leaders, Current Investors) to get you there.

Special Note: I am only 3° away from the Pope, the President and the Prime Minister of Israel. And, I'm only 1° away from the Dalai Lama and the Teosach/Prime Minister of Ireland. How? Because of my CONNECTIONS and RELATIONSHIPS, I can get to 'someone' who can get to 'someone' who can get to the Pope, the President and the Prime Minister.

STRATEGIZE

THE BIG IDEA: HOPE IS NOT A STRATEGY!

Now that you have **IDENTIFIED** and **PRIORITIZED** your best and most qualified prospects ... it's time to do some '**STRATEGY**!'

HOPE IS NOT A STRATEGY! Take the time necessary to do the required **DISCOVERY**. (aka, research, knowledge base, etc.) Do a high level **STRATEGY** of the **RELATIONSHIP** and the **PRESENTATION (VISIT)** itself.

We've broken down this strategy component into three areas/checklists:

1. KNOWLEDGE BASE
2. PROSPECT STRATEGY CHECKLIST
3. PRESENTATION

As my mentor Frank Sullivan reminded me so many times ... even very, very experienced airline pilots, with thousands and thousands of hours of flight time, **ALWAYS** go through their '**PRE-FIGHT CHECKLIST**'!!!

This includes walking around the airplane just to make sure nothing is falling off!

Following are the templates/frameworks/checklists that we use with all of our clients and prospects.

Feel free to adjust, edit, improve or customize. However, I would urge you to utilize these 3 **CHECKLISTS** for every one of your top prospects!!!

KNOWLEDGE BASE (TEMPLATE)

CAPACITY

The Rating. Where this came from (Referrals, Business, Screening, Other). E.g. John, Board Member, says "Joe and Jill can underwrite the entire campaign if they wanted to."

RELATIONSHIP

Relationship to the Organization, Case, the Cause, the Project, etc.
Connectors, Natural Partners, Other Connections.

GIFT HISTORY

Keep it simple. You're looking for LAST... LARGEST... and TOTAL.
*Don't forget PLANNED GIFTS!

TIMING

Should look at timing around you/the organization as to what order to visit, when best time, etc.
*Not as much about prospect life, business, family, etc.

OTHER GIFTS

Other known philanthropy. Organization and size of gifts. Existing pledges or commitments elsewhere, if possible.

ADDITIONAL DISCOVERY/RESEARCH REQUIRED

OTHER NOTES

A place to explore. E.g., corporations or foundations, ensuring you have the top officers, primary contact or INTERNAL CHAMPION, etc.

BIG NOTE: This can be 'filled out'/completed by the client/org and then used as part of Prospect Strategy.

PROSPECT STRATEGY CHECKLIST

Prospect: _____ Relationship Manager:

Decision Maker: _____

Natural Partner/Champion: _____

KNOWLEDGE BASE:

RELATIONSHIP GOALS:

'HOOKS'/SUGGESTED PROJECTS/AREAS OF INTEREST:

ADDITIONAL RESEARCH REQUIRED:

POSSIBLE CHALLENGES:

PREDISPOSITION IDEAS:

PRESENTATION DESIGN/THE 'EXPERIENCE:

ACTION PLAN: (Next Steps)

VISIT CHECKLIST

Prospect: _____

Relationship Manager: _____

Decision Maker: _____

- **WHO** ... needs to be there (Presentation Team)?
- **HOW** ... will we predispose for this visit?
- **WHEN** ... is the best time?
- **WHAT** ... do we want to accomplish (Goals)?
- **WHAT** ... do we need to learn on the visit (Discovery)?
- **WHAT** ... questions can we ask to help us in Discovery and transition toward Goals?
- **WHERE** ... BEST place for visit?
- **POTENTIAL CHALLENGES** (objections) ... and responses.
- **POSSIBLE PROJECT/PROGRAMS** ... (no detail, just overview).
- **FLOW** ... of the visit .
- **ENGAGEMENT TOOLS** ... for the visit.
- **FOLLOW-UP PLAN.**

NOTES:

A SIDEBAR ON FOUNDATIONS

Make sure you know the difference between a **'REAL'** foundation and a foundation that is merely a mechanism or vehicle for an individual or corporate gift.

The 'REAL' foundation is a much more structured organization, the founders are usually gone and there is a Board, Executive Director, President and Program Officers.

Think Pew, Annie E. Casey, McArthur, Ford, Carnegie and all of your Community Foundations.

There are usually a lot of 'hoops', mandatory (ridiculously complex) grant guidelines and grant request forms, etc.

**There are also some 'REAL' Foundations like Gates, Google, Skoll and Omidyar, whose FOUNDERS are still engaged but are very large and very structured.*

Finally, there are FAMILY FOUNDATIONS and CORPORATE FOUNDATIONS that are merely the means or mechanism for giving. There is 'SOMEBODY', a REAL PERSON or PERSONS, who control the funds and who can MAKE DECISIONS!

Special, Special, Special Note: A FOUNDATION, just like a CORPORATION, is still about VISITING with REAL PEOPLE!!

It's not about 'SHOTGUN GRANT PROPOSALS'! It's not meeting with the 'COMMUNITY RELATIONS' Director!

It is about getting to the DECISION MAKER, the HIGHEST LEVEL of LEADERSHIP possible ... and making your **PRESENTATION!**

THE CLOSE

*“I love all this. I think I get it.
What do I do now???? Next????”*

IF ... it were me, I would!

1. Really (really) strategize/analyze my TOP 33 QUALIFIED (3/10/20) PROSPECTS!!!
2. Determine the ORDER OF VISITS.
3. DO THE MATH (using the ‘Magic Napkin’) to know more about how much to present.

THEN ... I would:

JUST VISIT. JUST PRESENT. JUST ASK!

ABOUT TOM SUDDER

Tom Sudder has made a name for himself as a thought **leader**, a motivating **coach**, a master **facilitator & trainer**, an engaging **speaker** and a prolific **writer**. Tom has almost 40 years of experience in Strategic Visioning, Fund Development, Business and Entrepreneurship.

He began his career in the Development Office at the University of Notre Dame in 1973. In 1983, he founded The Sudder Group, which has managed over 400 Campaigns, raised over **\$1 Billion** and helped generate 3 million new jobs in their work with 125 Economic Development Organizations around the country.

And, in the last 10 years, the For Impact Partners and Coaches have helped organizations raise **another \$1 Billion** to scale and grow their Impact.

Tom has made more than 6,000 one-on-one 'sales' presentations ... and has trained thousands of 3rd Sector and Business Leaders in the art and science of becoming a For Impact Organization. He is the author of ***Take A Quantum Leap***, a number of ***For Impact Guides*** and co-author with Nick Fellers of the content at **ForImpact.org**.

A **serial entrepreneur** since age 16, Tom has founded 19 businesses; and now dedicates one-third of his 'work' schedule to helping social entrepreneurs change the world. He also spends significant time in Ireland helping to transform the country's philanthropic model.

In 1997, Tom **won a Trip Around the World** (the only contest he has ever entered) where Success Magazine and Opportunity International awarded him a chance to share his entrepreneurial experiences with Third-World Micro Entrepreneurs in Russia, Poland, India, Bangladesh, the Philippines and Australia.

Tom served in the U.S. Army as an Infantry Officer, Airborne and Pathfinder. He was a two-time welterweight boxing champion at Notre Dame, and has been the **boxing coach** there for almost 40 years. He returns every year for a six-week 'mini-sabbatical' to coach and referee the Bengal Bouts. He is the **Executive Producer** of ***STRONG BODIES FIGHT***, a documentary film about Notre Dame Boxing and its impact upon the Missions in Bangladesh.

Tom recently competed in the Masters Division of the Ringside Boxing World Championship and **won the title** in his weight class.

Throughout his crazy, eclectic, eccentric life, Tom has been anchored by his family. Now, his seven grandchildren are the centerpiece of life on his 50-acre farm/training center, Eagle Creek, outside of Columbus, Ohio.