

ON **ENGAGEMENT**



A For Impact Guide to **IMMEDIATE TRANSFORMATION**

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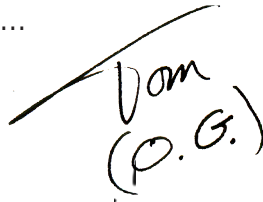
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DEDICATION

To all those hearty souls who are in the field, (almost) every day...
ENGAGING with their best people, prospects, and potential investors!

You know who you are...



DISCLAIMER

These Guides, PDF's, E-Pamphlets are my latest thinking, and usually a Collection of 'Nuggets' and Ideas.

I always have more to add, but I need to GET THIS OUT (into the ether-net), NOW.
I know it can be 'better.' But, it will never be 'perfect.' My 'chicken scratch', Egyptian hieroglyphics seem to have a positive, motivational effect on most who read/translate.

Much more at forimpact.org.

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, 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**’.

*“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

ON **ENGAGEMENT**

INTRODUCTION

***“Success is a result of Good Judgement.
Good Judgement is a result of Experience.
Experience is a result of Bad Judgement.”***

- Will Rodgers

The last couple of years have been challenging and difficult...and have led to a lot of EXPERIENCES. (Good & Bad)

Now is the time to use those EXPERIENCES to focus on **‘ENGAGEMENT’!**

As Goose said to Maverick, in *Top Gun*

“ENGAGE, MAV, ENGAGE!!!”

In our world, (just so there is no confusion) **ENGAGE** means VISIT...SHOULDER TO SHOULDER...OUT OF YOUR OFFICE... with your BEST INVESTORS and PROSPECTS.

Andy Grove, of Intel fame, has created a 3 word battle cry that changes everything,

“ENGAGE. THEN PLAN.”

*Remember Martin Luther King said,

“I have a dream!”

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

ON ENGAGEMENT

Newton's Law states,

***“A body in motion tends to stay in motion,
A body at rest tends to stay at rest.”***

I'm no physics major, but I get this: **ENGAGE** means GET IN MOTION!!!
You can hide under your desk because of the economy, fear, call reluctance, whatever...
OR, you can buy into our **IMPACT DRIVES INCOME** insight and epiphany.

More VISITS (with BEST PROSPECTS) means...

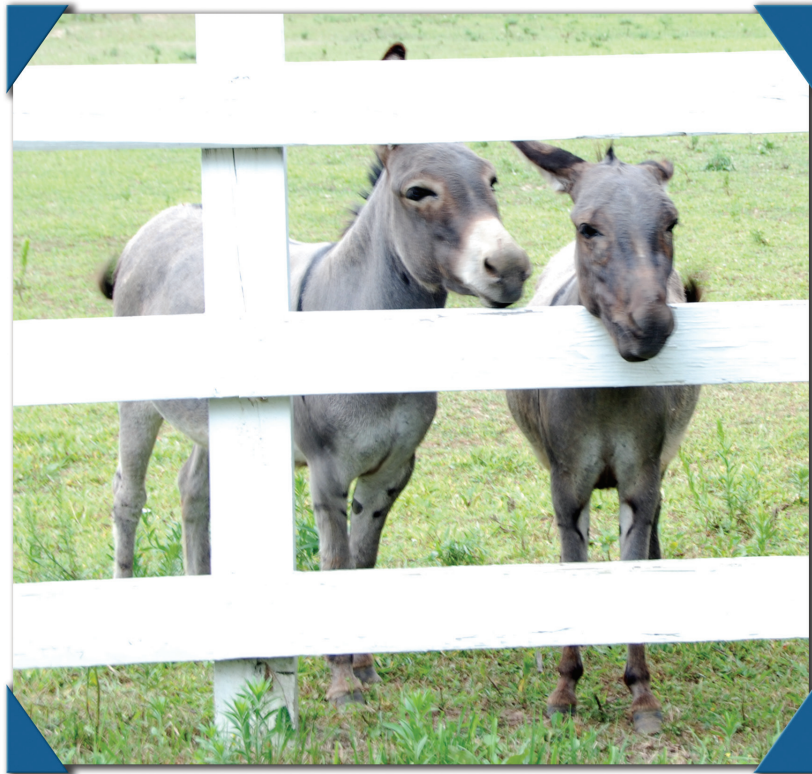
More PRESENTATIONS (to Share the Story/Present the Opportunity) means...

More MONEY (to Fund the Vision) means...

More INCOME...creating much more **IMPACT**.

Go Forth and **ENGAGE!**

GUARANTEE: IF you commit to **ENGAGE** with your CHAMPIONS and your
MOST QUALIFIED PROSPECTS... your entire organization will be TRANSFORMED!



Our two miniature donkeys, Princess and Daisy.

As my much younger, irreverent partner Nick would say,
“Get off your ‘donkey’ and go see people!”

RULES OF **ENGAGEMENT**

Here are the **9 Rules of Engagement**, without any supporting text or thoughts.

1. **IMPACT** drives **INCOME**. Not the other way around.
2. MAXIMIZE RELATIONSHIPS...AT THIS GIVEN MOMENT.
3. THINK BIG. BUILD SIMPLE. ACT NOW.
4. Different RESULTS require a different DESIGN.
5. DO THE MATH.
6. HOPE is NOT a STRATEGY.
7. YOU'RE IN SALES. GET OVER IT.
8. FOCUS. FOCUS. FOCUS.
9. JUST ASK. JUST ASK. JUST ASK.

RULES OF **ENGAGEMENT**

Use these 9 FOR IMPACT ideas and principles to help you ENGAGE:

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.
- **STOP** 'Cultivating'. (Spreading manure on crops!)
- **STOP** doing 'Research'. (All you need to know can be discovered on the visit.)

JUST ENGAGE!

RULES OF **ENGAGEMENT**

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

This is the Entrepreneur's Mantra, and a 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 last year's results, or the predictions for next year, you've got to **CHANGE** the **DESIGN** (or face Big AI's definition of **insanity**: Same thing, over and over, expecting different results!)

'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 (see addendum) based on **ENGAGEMENT** in the world as it exists today (not the one from the 1950's).

RULES OF **ENGAGEMENT**

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 Return On Investment (R.O.I.)? The Value Proposition? The Funding Rationale? 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’ that 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. Now is the time to APPLY the underlying principle that ‘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.

RULES OF **ENGAGEMENT**

8.) **FOCUS. FOCUS. FOCUS.**

“You become what you think about.”

– Earl Nightingale

This is Earl's **‘Strangest Secret’**...and the principle of laser-like FOCUS is the single greatest attribute of most successful people.

IF... ALL you THINK about is **ENGAGING** with your best Champions and your most QUALIFIED PROSPECTS...

THEN you will see immediate, transformational RESULTS!

IF... ALL you THINK about is focusing on ‘special events’, ‘golf’, ‘galas’, ‘direct mail’, ‘shotgun grants’, ‘formal proposals’, search committees, reports, meetings, etc.

THEN... you will continue to end up with a horrible RETURN on INVESTMENT... RETURN on ENERGY...RETURN on RELATIONSHIPS.

FOCUS, FOCUS, FOCUS on **ENGAGEMENT**... and your ‘results ’ (RETURN) will be exponential!

RULES OF **ENGAGEMENT**

9.) **JUST ASK. JUST ASK. JUST ASK.**

Nothing you do regarding '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 **ENGAGEMENT**... then you are committing to:
More VISITS, More PRESENTATIONS, and More 'ASKS'!

3 IDEAS TO HELP YOU ASK

1. Get Something On The (Proverbial) 'TABLE'.

Here's another of Nick's 'BRILLIANT' ways to make the JUST ASK point:

Just get SOMETHING on the 'TABLE'.

- Get the 'level of engagement'... on the table.
- Get a 'dollar amount'... on the table.
- Get a 'priority or project'... on the table.

2. Get a 'ROADMAP' to the gift.

Again, Nick has been using this as a HUGE part of our training and strategy with sales teams.

Don't leave the visit without a literal '**ROADMAP**' to the gift!!!

"Are you in?" "What can we do to solidify commitment?" "How can we confirm amount?" Etc.

3. Try for a TRIPLE ASK on every visit!

In our world, the 'best of the best' learn how to make a 'Triple Ask' tied to Today | Tomorrow | Forever. They use this to answer "How can I help?"... and frame this around Annual Operations, Priority Projects and Legacy.

ON **ENGAGEMENT**

Here are **10 Action Steps**, to help you ENGAGE:

- 1. SIMPLIFY YOUR MESSAGE.**
- 2. BUILD YOUR FUNDING RATIONALE.**
- 3. DO THE MATH!**
- 4. Create a simple, powerful PRESENTATION...
STORY LINE... and ENGAGEMENT TOOL**
- 5. Finalize your MASTER PROSPECT LIST!**
- 6. SET YOUR GOALS OF ENGAGEMENT!**
- 7. COMMIT TO BETTER PREDISPOSITION.**
- 8. ACT/EXECUTE on YOUR ENGAGEMENT STRATEGY!**
- 9. Commit to SHARING THE STORY and PRESENTING
THE OPPORTUNITY!!!**
- 10. JUST ASK. JUST ASK. JUST ASK.**

ON ENGAGEMENT

AN ACTION PLAN

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

If you're truly committed to **ENGAGEMENT**...do these **action steps** 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 FUNDING RATIONALE!

What is the VALUE PROPOSITION? What is the CASE FOR SUPPORT? What is the RETURN-ON-INVESTMENT? ('Both/And' Left Brain/Right Brain. Logic/Magic. Tangible/Intangible.) What are your PRIORITIES? Your 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?

* I know. It's RULE #5, but it's a different spin, and worth a repeat.

ON ENGAGEMENT

4.) Create a simple, powerful PRESENTATION... STORY LINE... and ENGAGEMENT TOOL

Use a Napkin, Vision Card, Map, Engagement Tool, or whatever to provide 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 ENGAGEMENT 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.) Finalize your MASTER PROSPECT LIST!

IDENTIFY, 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 with your best shot at your MPL!

Of critical importance is your **TOP 33** (the 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*

ON ENGAGEMENT

6.) SET YOUR GOALS OF ENGAGEMENT!

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

Here are 3 Examples:

■ The '33 GIFTS' Plan. (Example)

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.**

E.g. 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. (Example)

We will **ENGAGE** with our **BEST 300** prospects (including our Top 33), which will generate bags and buckets of money to Fund Our Vision.

*E.g. We have (3) members of our SALES TEAM, and 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.**

■ The '1,000 ENGAGEMENT' Plan. (Example)

As a larger For Impact organization with 6 committed Relationship Managers, we will make **1,000 VISITS/PRESENTATIONS** this year.

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.*

ON ENGAGEMENT

7.) Commit to better PREDISPOSITION.

“I can’t get a visit.”
“They haven’t returned my call.”
“They won’t see me.”

None of these excuses are acceptable in THIS ENGAGEMENT MODEL.

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

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

8.) ACT/EXECUTE on this ENGAGEMENT STRATEGY!

Set up your next month’s visits **right now!**

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!)

‘10,000 PUSH-UPS’

Use this ‘Push-Up’ analogy to help reinforce ACTION.

If you commit to do **10,000** push-ups a year, 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 **63,000** push-ups a year. (1,000 push-ups x your age). The SIMPLE EXECUTION is 3 sets of **63 a day...every day.**

The point is that you can’t skip 3 days... or you’re screwed. You can’t wait until June to begin. Nor can you wait until November to make 100 visits (because you’ve only made 3 visits a month up until then).

ON ENGAGEMENT

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

STOP 'CULTIVATING'! (Spreading manure on your prospects). Start to SHARE the STORY on every VISIT. 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 by CHANGING THE WAY YOU TALK!

CHANGING THE WAY YOU TALK is a proven technique to CHANGE THE WAY YOU ACT and CHANGE YOUR RESULTS.

THINK Impact, Cause, Philanthropy, Investors, Investment, Presenting Opportunities, Visits, Predisposition, Sales... and, of course, **ENGAGEMENT!!!**

**See 'CHANGE YOUR VOCABULARY' at forimpact.org*

10.) JUST ASK. JUST ASK. JUST ASK.

Again.

ON ENGAGEMENT

EXTRA CREDIT: LOOK BACK FOR FEEDBACK

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

List all of your '**SOURCES OF REVENUE**'... and the **COST** (EXPENSES) to generate that REVENUE.

EXAMPLE

	REVENUE	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**.

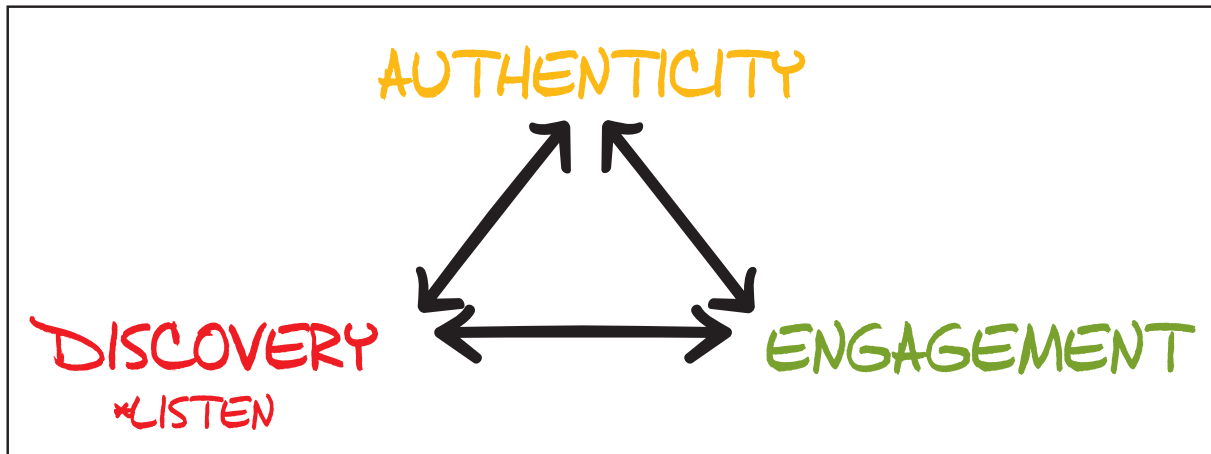
You also might use this to review the ROLES & RESPONSIBILITIES of your team.

REMEMBER: The **GOAL** of every Development/Advancement Office is to **write a net, net, net check** to the **IMPACT** side of the organization. (The 'Green' people help the 'Blue' people)

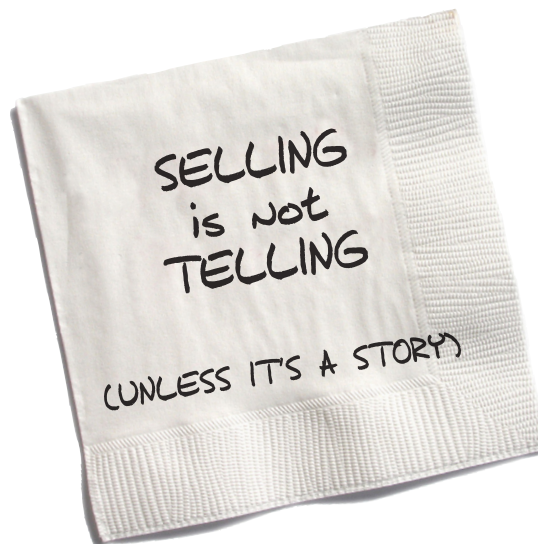
ON **ENGAGEMENT**

PRESENTATION FRAMEWORK

Our PRESENTATION FRAMEWORK is simple... but it's taken **30 years** to get there!



The 'green' **ENGAGEMENT** word is there to remind all of us that:



Our goal on the visit is to get people **ENGAGED**...
in **conversation**, in a **dialogue**, and in the **vision**!!!

ON ENGAGEMENT

THE ENGAGEMENT TOOL

SHOW. LISTEN. ENGAGE.

We have pioneered the use of a **simple, visual** 'ENGAGEMENT TOOL' to replace your PowerPoint, brochures and existing material.

- The **GOAL** is a simple, visual 'TOOL' (MAP) to help present a powerful CASE for SUPPORT... on a 'shoulder-to-shoulder' VISIT.
- The **PURPOSE** of the Engagement Tool is three-fold:
 1. It is a specific, visual way to ENGAGE the Prospect in **CONVERSATION** and **DIALOGUE**. (Thus, 'Engagement' Tool vs. 'Presentation Tool'.)
 2. It's a great **FRAMEWORK** for the VISIT/PRESENTATION.
 3. It puts the '**CLOSE**' (HOW YOU CAN HELP) right in front of the **Presenter(s)** (Sales Team) **and** the **Prospect**.
- The **STRATEGY** with the Engagement Tool is to CONTROL THE FLOW of the Presentation! (Think of it like Linus' Security Blanket!)
- The **ENGAGEMENT TOOL** is

NOT a 'brochure'!

NOT meant to be a 'stand alone'!

NOT a 'collateral piece'!

NOT a text-heavy, small print, multiple-page 'document'!

SHOW
(Don't tell.)

LISTEN
(Don't talk.)

ENGAGE
(Don't pitch.)

ENGAGEMENT TOOL TEMPLATE

(Organization)

(Tag Line)

PURPOSE

The BLUE BOX = MESSAGE!

Clear
Concise
Compelling

STORY

STORY

STORY

3 Powerful STORY-LINES!

* Permission To Proceed

PRIORITIES

3 Circles, -
One word per circle -

Where funds will
be used...
with 3 examples each of
projects/programs to
be funded.

...

*On Back:
Map,
Pictures,
VISUAL
ENGAGEMENT!

* Permission To Proceed

PLAN

HOW YOU CAN HELP:

1. **CHAMPION...**
(Organization)

2. **INVITE...**
Others to ENGAGE.

3. **INVEST...**
With COMMENSURATE
COMMITMENT.

TODAY

Join...

Fund...

TOMORROW

Invest In...



...

FOREVER

Leave
A
Legacy...

ON ENGAGEMENT

THE ENGAGEMENT TOOL

(Additional Notes and Thoughts)

* Following are notes and thoughts to help you understand this at the conceptual level... as well as how best to **USE** the ENGAGEMENT TOOL to produce '**closes**', '**commitments**' and '**cash**'.

- **It grabs their attention!** The SIMPLICITY and VISUAL nature of this 'piece' is so totally different than most material being used on Visits (which are not designed for one-on-one Presentations!)... that it commands attention! (Most likely, this will be the **first** and **only** actual 'Presentation' Tool for your organization.)
- **It is all about the 'REAL ESTATE'.** (**Location, Location, Location**) Using the constraint of limited space, the Engagement Tool tries to capture an organization's IMPACT POINTS and many of the TALKING POINTS necessary to make a great Presentation and, at the same time, provides for meaningful '**white space**' to allow for emphasis, additions, or clarifications.
- **It actually allows for a 'TRIPLE ASK'!!!**

TODAY

(Annual Operations)

TOMORROW

(Priority Projects)

FOREVER

(Legacy Giving)

[As opposed to '**cultivation**', **multiple visits** and never getting '**dollars on the table**', much less '**in the bank**'!]

- **It is designed at ALTITUDE.** (See forimpact.org for more.)

30,000'

WHY

PURPOSE

(BLUE)

14,000'

WHAT

PRIORITIES

(RED)

3'

HOW

PLAN

(GREEN)

We have used this ALTITUDE FRAMEWORK as an integral, critical part of our presentation FLOW with hundreds of organizations on thousands of visits. It works.

1. **Start with, the WHY.** Once they're on board...
2. **Move to the WHAT.** Once they understand ...
3. **It's on to the HOW.** HOW you will execute and HOW they can help.

ON ENGAGEMENT

THE ENGAGEMENT TOOL

(Altitude, continued)

Here is a deeper explanation of the power of '**ALTITUDE**' on a visit/presentation:

- **Always go (back) up.** Nick Fellers has a really great way to use 'altitude/elevation' on the presentation. When training or coaching, Nick makes this very clear: **When in doubt... when challenged... when questioned... ALWAYS GO (BACK) UP TO 30,000'** (The Vision...The Message...The Purpose.)
- **Get 'buy-in' at the highest level.** As you make the Case for Support, the prospect/ potential investor needs to understand and acknowledge their acceptance of the 'blue' VISION and 'red' PRIORITIES. Sometimes this is "You had me at hello." (Renee to Tom Cruise) Other times, it may take the entire first visit to get them to understand and agree that this is an important cause and case. Regardless, it doesn't make any sense to talk about the Plan or How They Can Help if they don't 'get it' at the highest level.
- **Dissent on the descent.** To put this in another way, there can be no '**dissent**' on the **descent**! I think of this as kind of the opposite of getting the '**bends**'. If a diver ascends too quickly, they get a case of the 'bends'. It's painful and many times life-threatening. During a presentation, the prospect can get the '**reverse-bends**' if you descend too rapidly. "Hello. Thanks for seeing me. Here's our campaign Can you give \$100,000?"
- **'Permission to proceed'**. We have actually incorporated this specific terminology into the presentation. (It's actually the words used to complete a 'transfer' on a high ropes challenge course!) "It seems like you're fully engaged with both our Mission and our Message. Would it be okay (**permission to proceed**) to go deeper and talk about our Strategic Priorities and our Plan to make all this happen???"
- **Altitude is not always top-down or hierarchical.** You can 'enter' at any level. You can focus on any level. You can travel up and down... and even side to side, especially when you're using an Engagement Tool.

ON ENGAGEMENT

THE ENGAGEMENT TOOL

Notes on How to Use

- **Learn to draw!** The Engagement Tool is meant to be used with **markers, colored pens** or some **writing instrument**. You can add **visuals** such as arrows or circles or words as you use this framework. Write on it! It encourages **participation** and **conversation!**
- **Ask questions!** Again, since this is all about ENGAGEMENT, CONVERSATION and DIALOGUE, the Engagement Tool should allow for multiple ways to **ASK QUESTIONS!!!**

3 GREAT QUESTIONS:

1. The 'Blue', 30,000' Question:

"What do you **know** about... our Organization/our Current Vision/New Goals?"

2. The 'Red, 14,000' Question:

"Which one of these '3 Circles' (Priorities) is most important to you?"

3. The Green, 3' Question:

"Based on your understanding of the Purpose, Priorities and Plan... would it be okay to talk about *how you can help?*"

- **Transition is important:** Always use questions to transition from the levels of dialogue or engagement. E.g.
 - "What does your involvement with (Org) mean to you?"
 - "Did you have a unique experience at (Org)?"
 - "Are you willing to be a 'CHAMPION' for (Org)?"
 - "We are asking everyone in our family to help in 3 ways. Can we go there?"

ON ENGAGEMENT

THE ENGAGEMENT TOOL

Notes on How to Use (continued)

- **‘Permission to Proceed’**

We also call these ‘transition questions’ – because they TRANSITION within the flow.

- **“Would it be okay?”**
- **“Would it be possible to?”**
- **“At this time, I’d like to talk specifically about the Funding Plan if that’s okay with you.”**
- If there was a poor job of predisposition, you might even be able to get away with: **“I know we didn’t come here today to talk about numbers but it certainly seems like we’re in sync about the projects. Would it be okay if I were to share the Funding Plan?”**

Asking for permission to proceed allows you to be comfortably assertive.

- **Customize it.** Put the person’s or company’s name at the top, write in the specific Priorities or Projects to be funded, or whatever.
- **Leave it with them.** Many Prospects will actually ask if they can keep this ‘visual’ representation. You can leave them ‘their’ copy... with all the handwritten notes... and a clean copy that they can share with others (if needed).
- **Fold or front/back.** You can fold the Engagement Tool so only the ‘blue’ is showing. Keeps their attention/focus at 30,000’! (Then, I open it to ‘proceed’).

*We also have put a (Campus) MAP or ‘drawings/sketches’ of Building Projects on the back.

- **Size matters.** We (almost) always use this as an 18 x 24 or at least an 11 x 17. Plenty of room to write, draw, etc. Plus, you can stand up, move around and ‘engage’ your way through the Framework.
- **Finally, PRACTICE. PRACTICE. PRACTICE.** The more you use the Engagement Tool... the better you will be able to control the FLOW of the visit. And, you will figure out what works and what doesn’t.

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 age/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.