

# ON VISUAL ENGAGEMENT

*"The soul never thinks without a picture."*

- Aristotle



## A For Impact Guide to Help With **VISIT/PRESENTATION ENGAGEMENT**

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[www.forimpact.org](http://www.forimpact.org)

ForImpact | THE SUDDER GROUP

# DEDICATION

To Wolfie (Steve Wolf) our FI 'Engagement Tool' guy and to All our Coaches ... who use visual engagement and our engagement tools to help organizations articulate their purpose, communicate priorities and share the plan.

# 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). 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](http://forimpact.org).**

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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

SELLING  
is not  
TELLING

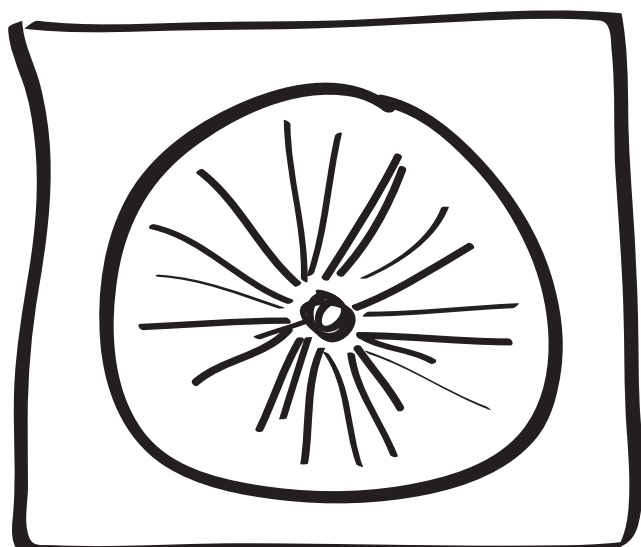
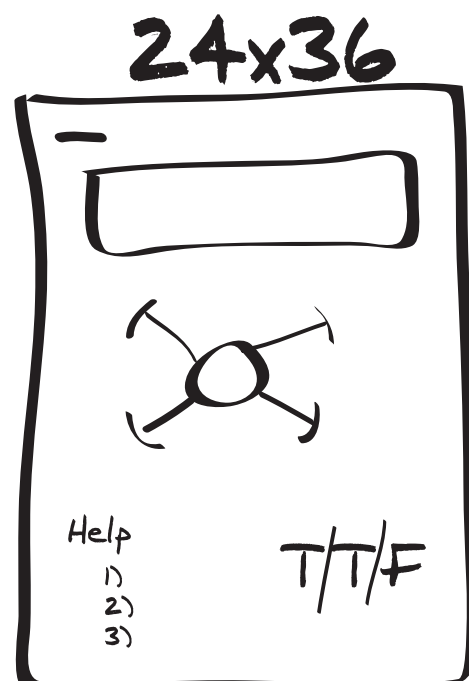
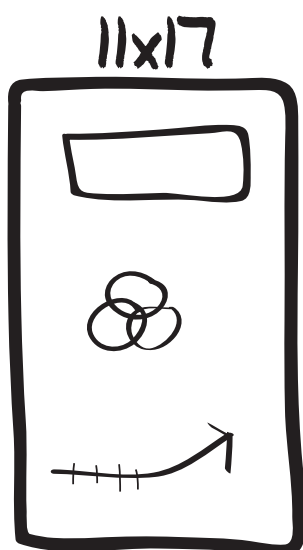
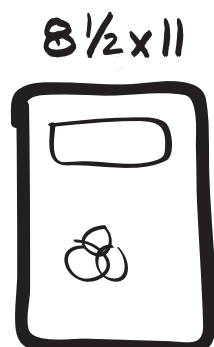
(UNLESS IT'S A STORY)



BZ Card

Napkin

Vision Card



A LIVE  
EXPERIENCE  
Campus, Hospital, E.R.

# ON VISUAL ENGAGEMENT

## INTRODUCTION

*"The soul never thinks without a picture."*

- Aristotle

Following is a For Impact Guide **ON VISUAL ENGAGEMENT**, primarily for the VISIT/PRESENTATION ... but also some thoughts on PREDISPOSITION.

If *"a picture is worth a thousand words"* ...

**strong, visual engagement** is worth millions of dollars!!!

VISUAL ENGAGEMENT can range from the back of your **business card** to a **napkin**, a **vision card**, an **engagement tool**, or a **'grab their attention' poster**.

Best of all, it can also manifest itself in a 'LIVE' engagement on a tour or a visit to where you deliver your IMPACT!!

I've provided some concepts, templates, how to use, examples and more ... all in the hope of helping you get your best team and prospects ENGAGED IN DIALOGUE/CONVERSATION.

Enjoy (and use).

Don  
(P.G.)

# ON VISUAL ENGAGEMENT

## PREDISPOSITION

The best possible 'VISUAL ENGAGEMENT' comes in the form of PREDISPOSITION to the visit itself!

Remember, you only have 30 minutes (average) on THE VISIT itself. The more selling/convincing before **THE VISIT** the better.

'VISUALLY' engage your prospect/potential investor by actually **showing** them when and how you deliver your **IMPACT!**

*SHOW TOUCH FEEL SMELL TASTE*

Think about:

- Get To Campus (GTC)
- A Tour
- Volunteer Participation
- Being in the 'Operating Room' and more.

\*This might also include a 'Signature' Event or other recognizable Memorable Experiences.

# ON VISUAL ENGAGEMENT

SHOW. LISTEN. ENGAGE.

## THE ENGAGEMENT TOOL

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

I am starting with this 11" x 17" presentation tool because of the huge value it has brought to our coaching clients and all who have used it.

- The **GOAL** is a simple, visual 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 'standalone'!
  - **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.)



# ON VISUAL ENGAGEMENT

## THE ENGAGEMENT/PRESENTATION TOOL

### ONE EXAMPLE WITH MULTIPLE APPLICATIONS

[DRAFT]

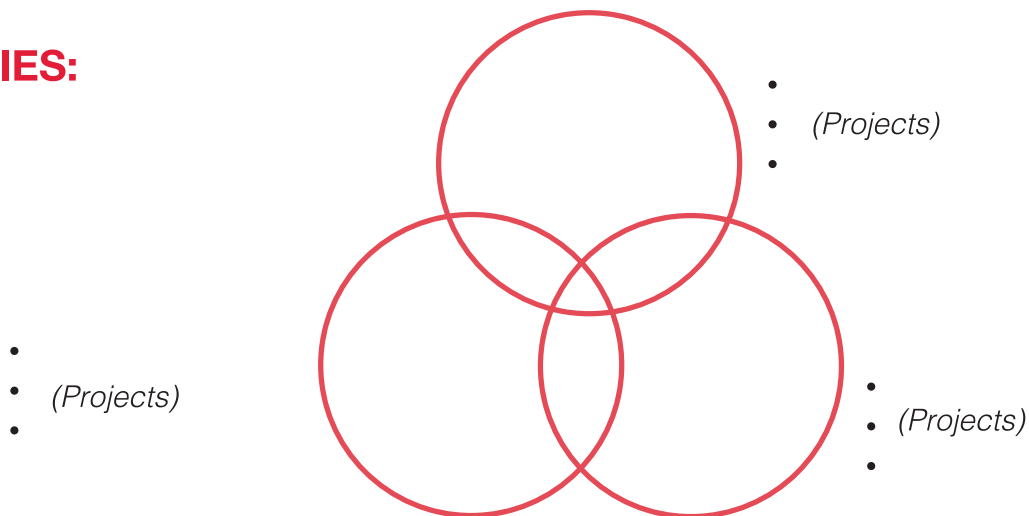
(Organization Logo)

(Tagline)

#### PURPOSE:

(Storylines)

#### PRIORITIES:



#### PLAN:

HOW YOU CAN HELP:

##### 1. CHAMPION...

Our CAUSE/CASE.

##### 2. INVITE...

Others to ENGAGE.

##### 3. INVEST...

With a COMMENSURATE  
COMMITMENT.

TODAY

Join...

Fund...

TOMORROW

Invest In...



FOREVER

Leave  
A  
Legacy...

# ON VISUAL ENGAGEMENT

## THE ENGAGEMENT/PRESENTATION TOOL

### ONE EXAMPLE WITH MULTIPLE APPLICATIONS

(Organization)  
(Tagline)

EXPLANATION **[DRAFT]**  
We leave this on ALL our Stuff!  
Allows for input!

#### PURPOSE:

BLUE BOX = MESSAGE!

Clearly  
Concisely  
Consistently  
Convincingly  
Compellingly

STORYLINE

STORYLINE

STORYLINE

3 Powerful STORYLINES!

\* Permission To Proceed

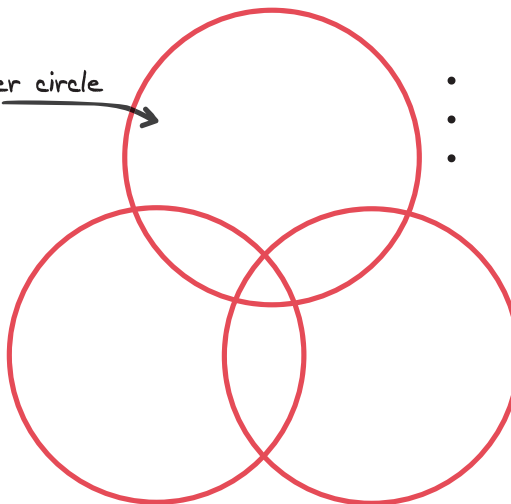
#### PRIORITIES:

3 Circles, -  
1 or 2 words 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:

Put this  
right out there-  
(ALMOST)  
IMPOSSIBLE  
TO NOT 'ASK'

##### 1. CHAMPION...

Our CAUSE/CASE.

##### 2. INVITE...

Others to ENGAGE.

##### 3. INVEST...

With a COMMENSURATE  
COMMITMENT.

TODAY

Join...

Fund...

TOMORROW

Invest In...



FOREVER

Leave  
A  
Legacy...

The 'Triple Ask'!!!

# ON VISUAL ENGAGEMENT

## ENGAGEMENT TOOLS

### CONCEPT

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

- **It grabs people's 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'!!!**

<u><b>TODAY</b></u>	<u><b>TOMORROW</b></u>	<u><b>FOREVER</b></u>
(Annual Operations)	(Priority Projects)	(Legacy Giving)

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

- **It acts as a 'STORY BOARD'.**

Think Walt Disney and how the teams at *PIXAR* or *DreamWorks* create! Every great movie begins as a series of **story boards** ... visual representations of the Theme, the Characters, and the Story. As with the engagement tool, story boards provide a **flow** for the animated stories ... beginning, middle and end.

# ON VISUAL ENGAGEMENT

## ENGAGEMENT TOOLS

### ALTITUDE

The engagement/presentation tool is designed at ALTITUDE.  
(See [forimpact.org](http://forimpact.org) for more on Altitude.)

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 are on board ...
2. **Move to the WHAT.** Once they understand ...
3. **It's on to HOW.** HOW you will execute and HOW they can help.

Special Note: Always **Start With WHY** !! The power of ALTITUDE is **TOP DOWN**!

Most 'SALES' / Development people sell 'Bottom Up'.

- "We need money."
- "We need your HELP."
- "Here's how we will spend your DONATION."

You need to Sell/Present 'TOP DOWN'!

\* Check out Simon Sinek's book and TED video [START WITH WHY](#) for some deeper thinking on this.



# ON VISUAL ENGAGEMENT

## ENGAGEMENT TOOLS

### MORE ON ALTITUDE

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.
- **No dissent on the descent.**

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 VISUAL ENGAGEMENT

## ENGAGEMENT TOOLS

### HOW TO BUILD

Here are **3 simple (but not easy) steps** to help you put together your Engagement Tool.

1. **SIMPLIFY YOUR MESSAGE!** We recommend that you pull your Senior Team and Field Team together to review all the current thinking on message, vision, taglines, etc. ... and then create the best, simplest, most powerful **PURPOSE STATEMENT** possible.

\*Would also suggest you have the team write out all of the best **STORYLINES** ... group them under some **COMMON THEMES** ... then select the 3 best storylines to **create the most engagement!**

2. **AGREE ON 3!** One of the most challenging actions is to reduce and simplify a list of Priorities, Projects and Programs into 3 'buckets'/circles.

There is no magic here. Just force the issue by creating one or two-word headings for your **PRIORITIES at the highest level.**

\*As a great 'default' ... just think about **PEOPLE, PROGRAMS** and **PLACES** (which works for almost any organization).

Then, you can group **fundable projects** under your 3 circles.

3. **DO THE MATH!** The more 'BLUE MATH' you have, the better. Funding Rationales, Use of Funds, Cost of IMPACT.

Also helpful to look at your **RED MATH**. These are costs and numbers related to your **TEAM**. This is usually a huge part of any operating budget, and you need to understand (and be able to communicate) these numbers.

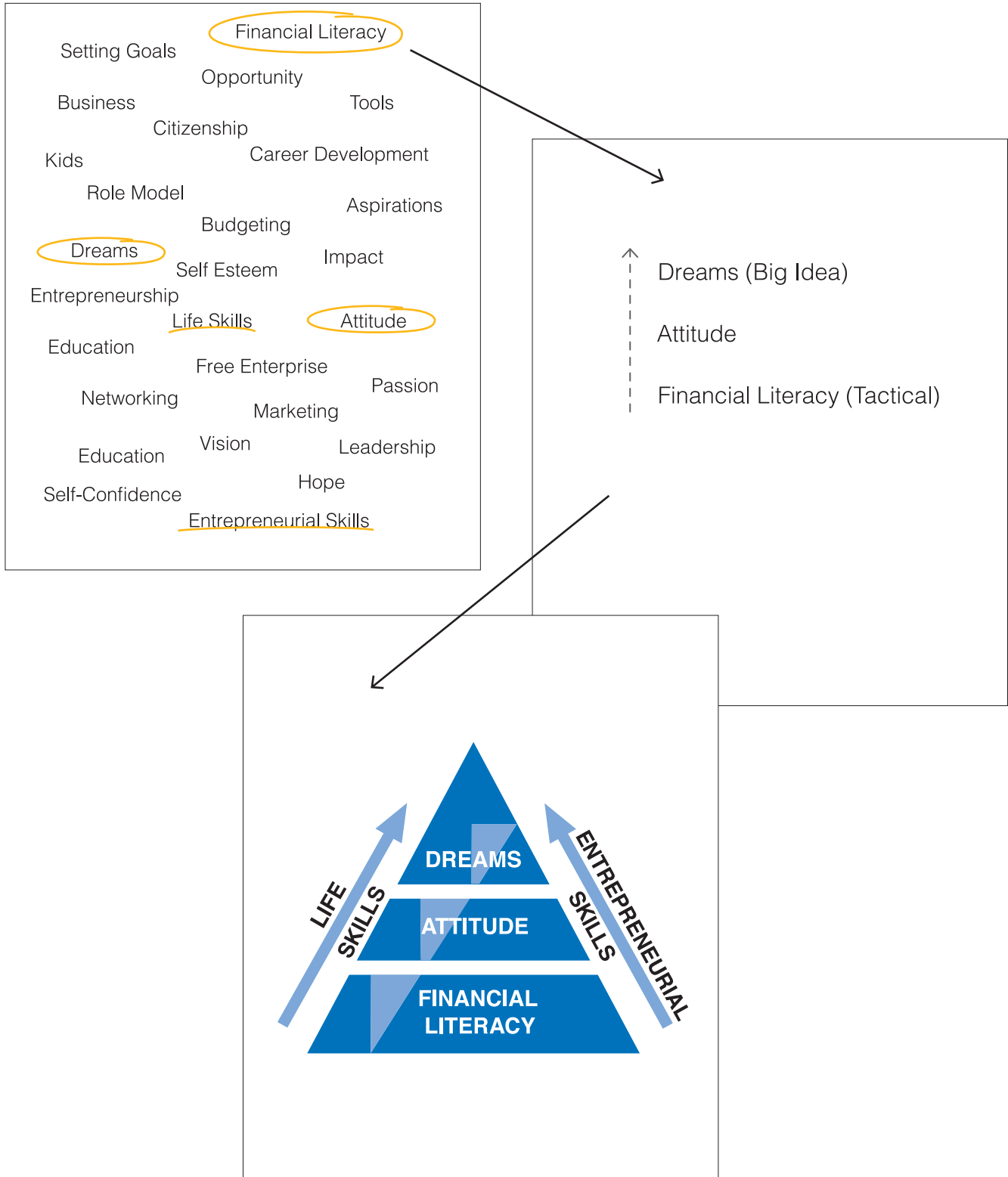
And finally, your **GREEN MATH!** The 1,000-Day Funding Plan. Dollar goals, The Funding Pyramid ( $1 + 2 + 4 + 8 + 18 = 33$ ).

For more help on building a powerful Engagement Tool ... contact Kerry Suddes ([kerry@forimpact.org](mailto:kerry@forimpact.org)).

# ON VISUAL ENGAGEMENT

HOW TO BUILD (example)

## PURPOSE/MESSAGE BUILDING



# ON VISUAL ENGAGEMENT

## HOW TO BUILD

### PRIORITIES TRIGGER LIST (examples)

#### **People Programs Places**

Training  
Services  
Disaster Relief

Impact Kids  
Grow Biztown  
Accelerate Urban School Initiatives

Students  
Teachers  
Campus

Homes/Shelter  
Education  
Counseling & Support

Advise  
Scholarships  
Financial Literacy Programs

Research  
Education  
Service

Catholic Education  
Catholic Charities  
Ecclesiastical Ministry

Editorial Expansion  
Special Web Initiatives  
Marketing & Outreach

Family  
Community  
Earth

Prevention Access  
Crisis Response  
Housing/Transition

Educational Experience  
Student Life  
Financial Stability

Homes  
Care  
Support

Community  
Curriculum  
Program Delivery

Meals  
Home  
Health & Wellness Programs

Research  
Education  
Advocacy

Youth Services  
Career Development  
Community Engagement

Career Planning  
Coaching  
Supervisor Training

Entrepreneurship  
Leadership  
Mentorship

Homes  
Education  
Healthy Families

Students  
Teachers  
Learning Experience



# ON VISUAL ENGAGEMENT

## ENGAGEMENT TOOLS

### 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. A 'Blue, 30,000' Question:

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

##### 2. A 'Red, 14,000' Question:

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

##### 3. A 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 VISUAL ENGAGEMENT

## ENGAGEMENT TOOLS

### NOTES ON HOW TO USE (continued)

- **Leave 'DRAFT' on every copy!!!** This is a great way to have people feel like they are involved in the plan.
- **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... **or** 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, which keeps their attention/focus at 30,000'! (Then, open it to 'proceed').

\*We also have put a (Campus) MAP on the back or 'drawings/sketches' of Building Projects or Math or whatever visuals can be displayed.

- **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.

# ON VISUAL ENGAGEMENT

## NOTES

# ON VISUAL ENGAGEMENT

## ENGAGEMENT TOOLS

### EXAMPLES

Here are three examples of actual ENGAGEMENT TOOLS, with some commentary to help you understand the application of this framework.

#### 1. GlobeFunder

**Background Story:** Two amazing Social Entrepreneurs (from Notre Dame) created a powerful platform for Micro-entrepreneurs and Micro-finance. Took their '78-page business plan' and set out to 'pitch' investors. Raised \$7.00 in eight weeks (from grandmother).

**Engagement Tool:** This was one of the first comprehensive Engagement Tools we created, and it helped Ben and Brian meet their \$800,000 BETA Funding Plan.

**Note:**

- PURPOSE and VISION STATEMENT.
- Three Powerful STORIES.
- Their actual BUSINESS MODEL that allows for simple explanation of how GlobeFunder works (vs. the 78-page BUSINESS PLAN).
- Simple, visual TIMELINE to explain START-UP, BETA and SCALE.
- REVENUE EXPLANATION.
- THE OPPORTUNITY! 16 Advisor Investors. \$50,000 Investment.

**Result:** Ben and Brian over-subscribed and **raised \$1.2M in about 3 weeks!!!**



## THE MICROFINANCE LENDING ENGINE...

to MATCH LENDERS & BORROWERS...  
addressing a \$40 Billion MARKET GAP.

**VISION:** To create a global community of investors...  
helping micro-entrepreneurs.

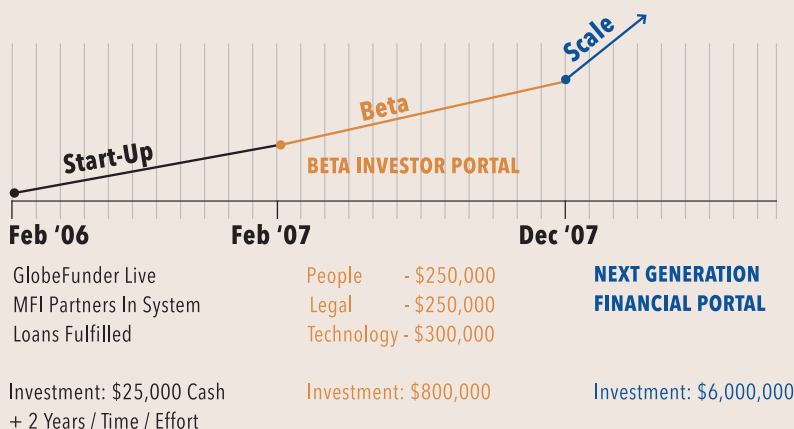
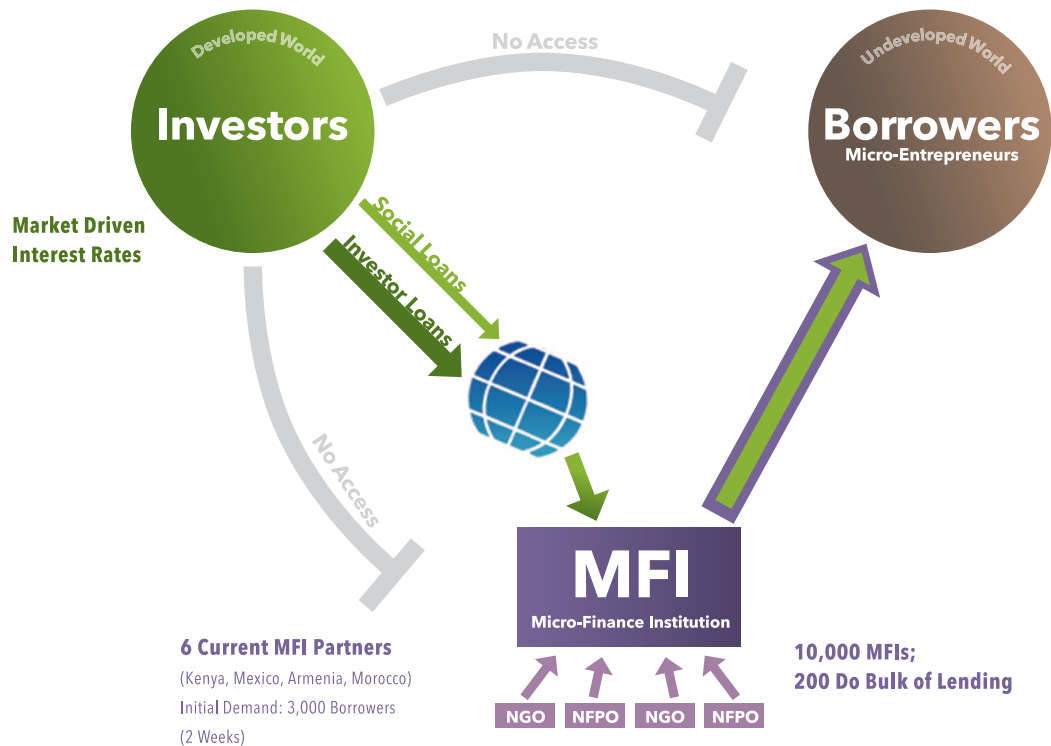
### GlobeFunder Story

### Microfinance Story

Grameen-Yunus-Nobel  
25 Year: Legitimate Debt Sector  
\$10 Billion Loaned to Date  
100 Million Loans: 60-90% WOMEN  
**97% Payback**

### Market (Demand) Story

500 MILLION Micro-Entrepreneurs  
\$50 BILLION Capital demand  
Growing at 15-30% annually  
**\*No existing scalable distribution model**



### GlobeFunder Revenue

**Borrower: Transaction Fee**  
**Lender: Broker Fee**  
**Globe Funder: The Float**

### \$ The Opportunity Beta Funding Plan

**16 Advisor - Investors**  
**\$50,000 Investment ( 1 Unit)**  
**1% Equity / Ownership in GlobeFunder**  
**\$800,000 Beta 'Angel' Funding**

# ON VISUAL ENGAGEMENT

## ENGAGEMENT TOOLS

### EXAMPLES

#### 2. 'BAY AREA ORG'

**Background Story:** 'BAO' had a great relationship with one of the largest healthcare providers in California. This 'PARTNER', however, had never invested in BAO. (Read that as **never given a gift!**) BAO senior team had big Presentation scheduled with senior leadership of healthcare partner.

**Engagement Tool:** This was the **actual** Engagement Tool used at the visit between the four senior leaders at BAO and seven leaders of the Healthcare Partner.

#### Note:

- This is the only 'HANDOUT' that was used on the visit/presentation.
- Super simple PURPOSE STATEMENT.
- Three PRIORITY CIRCLES, using PEOPLE, PROGRAMS and PLACES as a framework. Put in their words: World Class Talent, Innovative Solutions and Community Learning Centers.
- 33 WORDS. (Count them!)
- CEO presented at 30,000'. COO presented around WORLD CLASS TEAM. CFO presented around INNOVATIVE SOLUTIONS. CEO presented around COMMUNITY LEARNING CENTERS.
- Then, presented the INVESTMENT required to TRANSFORM the organization and meet the expectations of the PARTNER:

\$1.5M for 'People' ... \$1M for 'Programs' ... \$1M for 'Places'

**Result:** The PARTNER was asked if the \$3.5M was a 'fair' number.

***"NO. ... It should probably be \$50M!"***

Then asked if they could make this transformational investment in 'BAO'.

***"YES ... we just need to figure out where it will come from."***

One year later, this partner invested **\$22M** in the organization!

And it all began with a **33-WORD ENGAGEMENT TOOL!**

**'BAO'**

**'H.P.'**

**PARTNERSHIP**

**LOGO**

**Creating solutions, changing lives.**

**OUR PURPOSE:** Provide HELP, HOPE and ANSWERS...  
to CHILDREN and FAMILIES...  
affected by DISABILITIES.

## **VISION 2014 TRANSFORMATIONAL PRIORITIES**



# ON VISUAL ENGAGEMENT

## ENGAGEMENT TOOLS

### EXAMPLES

#### 3. Junior Achievement

This is a genericized JUNIOR ACHIEVEMENT ENGAGEMENT TOOL that provides some great examples of how to use the TEMPLATE.

**Note:**

- Strong PURPOSE Statement ... in 3 easily remembered components.
- 3 Great Story Lines that can be customized and adapted to the prospect. (Also match 'Nationals' 3 BIG talking points)
- A strong visual to get prospect ENGAGED!
- 3 simple circles to explain PRIORITIES ... which then allow for 3 Projects around each circle.
- HOW YOU CAN HELP allows for great DIALOGUE.
- TODAY. Note the words 'JOIN' and 'SPONSOR'.
- TOMORROW. Vision 2015. Strategic Plan. 1,000-Day Plan. Specific request around Priorities to be funded.
- FOREVER. Legacy Gift! Transformational Gift!

**Result:** This has been customized and used throughout the U.S. to generate significant resources ... and also help change the culture from 'Special Events' to 'Major Gifts'.

**PURPOSE:**

To ***INSPIRE*** and ***PREPARE... YOUNG PEOPLE...***  
To ***SUCCEED*** in a ***GLOBAL ECONOMY.***

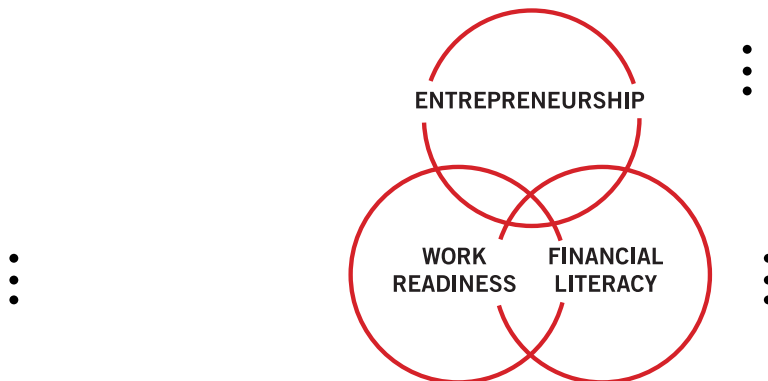
Youth  
Development

Educational  
Development

Economic  
Development


**PRIORITIES:**

Empowering Young People To Own Their Future Economic Success.


**[EXAMPLE]**
**PLAN:**
**HOW YOU CAN HELP:**

**1. CHAMPION...**  
JUNIOR ACHIEVEMENT.

**2. INVITE...**  
OTHERS TO ENGAGE.

**3. INVEST...**  
WITH A COMMENSURATE  
COMMITMENT.

**TODAY**

**INCREASE OUR IMPACT!!!**

- JOIN THE **1961 SOCIETY...**  
and help UNDERWRITE  
80 STUDENTS SUCCESS!

- SPONSOR CLASSES!

example

4,4000 Classes Scheduled.

4,200 Classes Funded.

200 Classes NEED SPONSORS!!!

**TOMORROW**

**INVEST IN JA: 2015!!!**  
(1,000 DAY STRATEGIC PLAN)

**STRATEGIC PRIORITIES  
TO BE FUNDED:**

- Increase Programs for Middle  
& High School Students  
\$500,000 = 1,000  
Additional Classes
- Grow Capstone Programs  
\$1,800,000 Investment
- Innovate Through Technology  
\$300,000 Investment

**FOREVER**

LEAVE A **LEGACY GIFT...**

MAKE A  
**TRANSFORMATIONAL GIFT...**

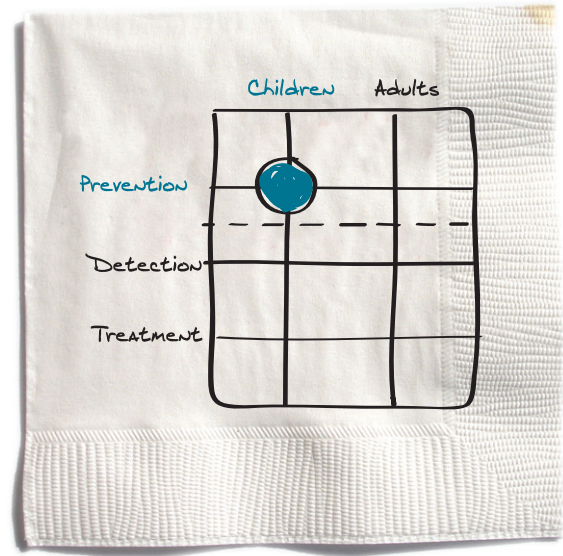
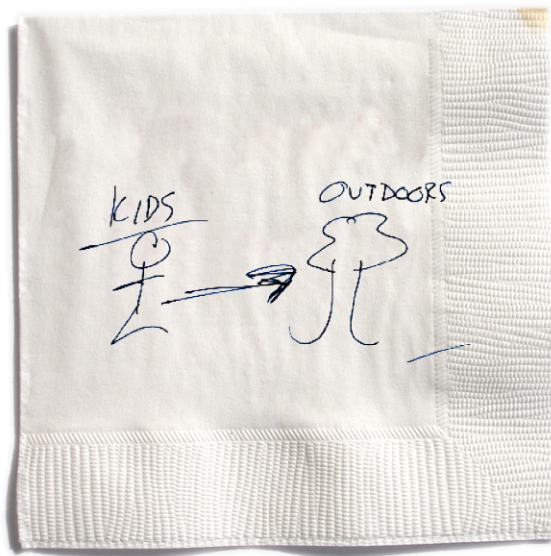
That will **IMPACT** students,  
families and the community.

# ON VISUAL ENGAGEMENT

## THE 'NAPKIN' VISUAL

One of the most powerful engagement tool is the use of a simple NAPKIN VISUAL to communicate an entire Vision, Purpose, Reason, Timeline, Priorities or even a Plan. It could be with 'WORDS' or a 'PICTURE' ... it just has to jump off the 'NAPKIN' (or engagement tool)

Here are some examples.



A hand-drawn table on a napkin titled 'THE QUANTUM LEAP'. The table has five columns representing different stages: 2005-2009 FOUNING, 2010-2011 TESTING, 2011-2012 DOING, and 2012-2013 SCALING. The rows represent different metrics: STUDENTS, TEACHERS, SCHOOLS, and INVESTMENT.

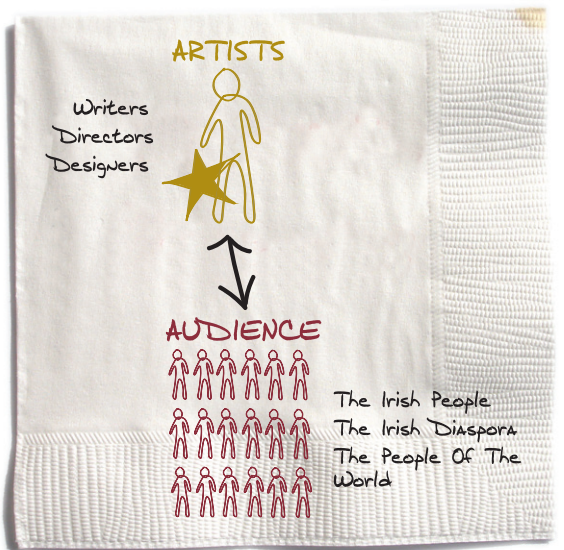
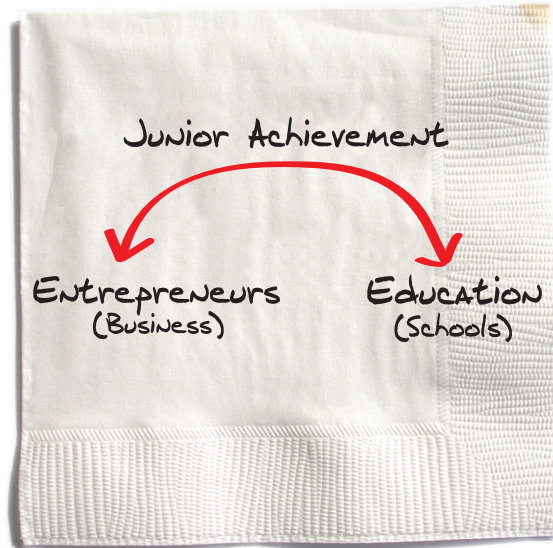
	2005-2009 FOUNING	2010-2011 TESTING	2011-2012 DOING	2012-2013 SCALING
STUDENTS	—	400	8,000	20,000
TEACHERS	—	20	80	200
SCHOOLS	—	5	8	25
INVESTMENT:		€150K	€250K	€500K





# ON VISUAL ENGAGEMENT

## THE 'NAPKIN' VISUAL



# ON VISUAL ENGAGEMENT

## BUSINESS MODELS ... ON A NAPKIN

If you don't think it's possible to capture your story, message, mission on a napkin ... check out these 4 'business models', captured on a napkin, that transformed or created entire industries.



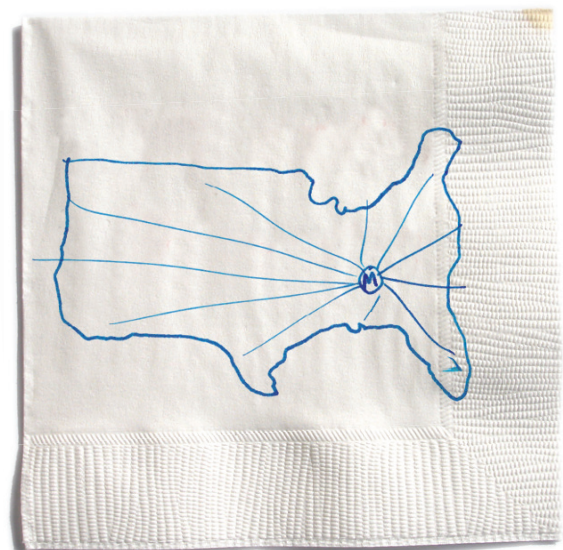
Burton Snowboards



Dell Computers



Starbucks



Federal Express



# ON VISUAL ENGAGEMENT

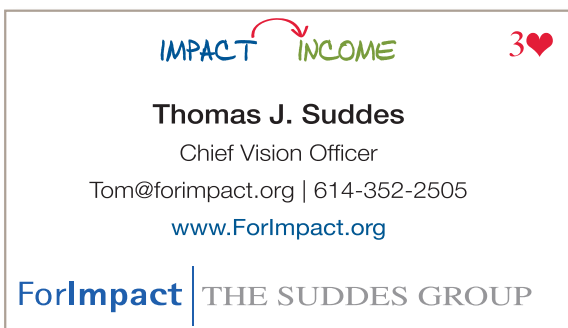
## BUSINESS CARDS

The 'Standard' business card has not changed in 100 years (or since Paul 'Kinko' Orfalea started printing them for pennies).

However, that's not the point. This is! The **BACK** of the business card is the most under utilized piece of 'REAL ESTATE' in America!!!

You should be able to capture you highest level message on the back of your business card, and be able to tell/sell your story using only this visual.

Here are 3 examples of the back of my business card, plus the back of a Junior Achievement card.



# ON VISUAL ENGAGEMENT

## BUSINESS MODELS

Not every visual ends up on a napkin. Here are 3 great visuals to communicate a (CAP) College Access Program's **WHAT, HOW, WHERE** ... followed by a visual for United Way that captures everything it does.

### CAP

**EXAMPLE**

*College Access Program*

**WHAT ... we do.**

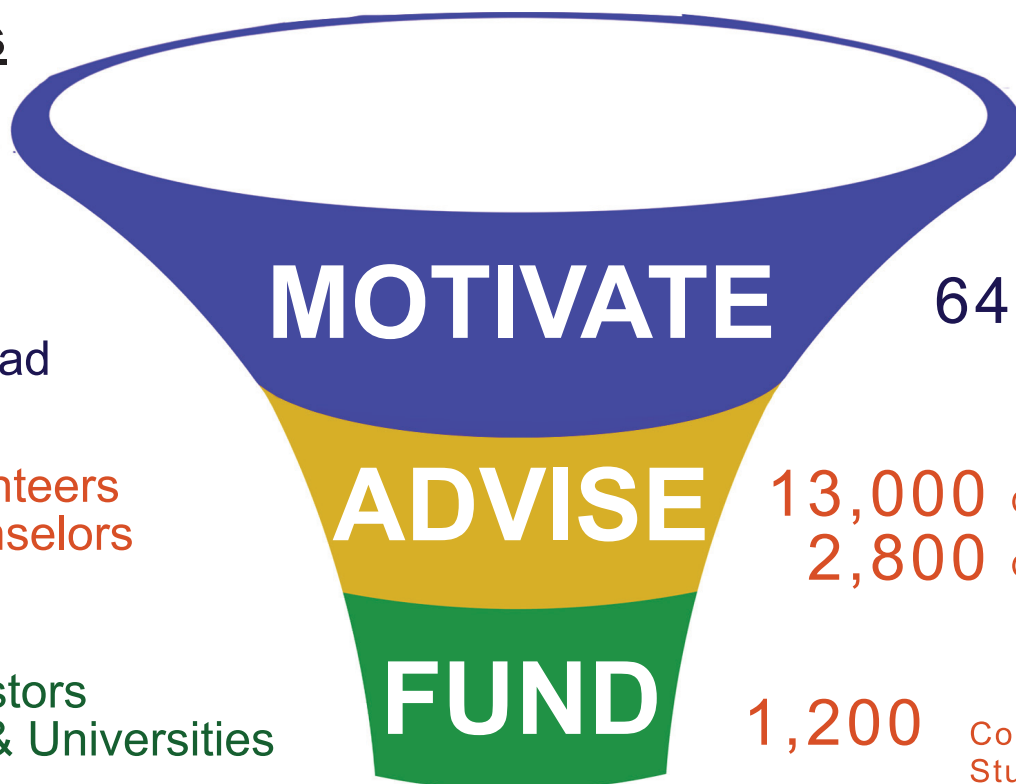
#### Partners

#### XPS Students

Parents  
Teachers  
XPS Staff  
Project Grad

CAP Volunteers  
XPS Counselors

CAP Investors  
Colleges & Universities



# ON VISUAL ENGAGEMENT

## BUSINESS MODELS

# CAP

## EXAMPLE

*College Access Program*

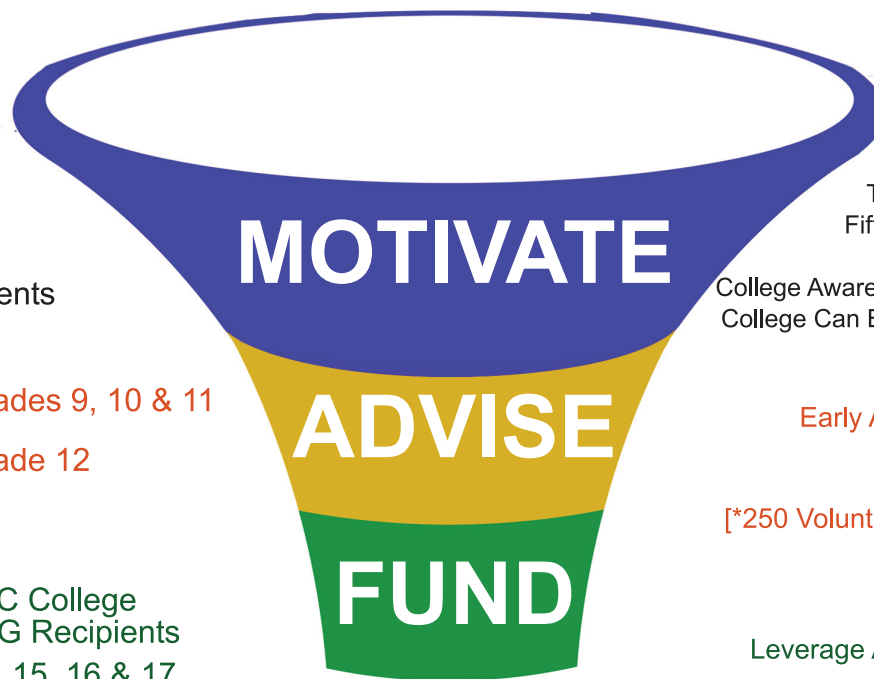
## HOW ... we do it.

### CAP IMPACT

**64,000**  
ALL CPS Students

**4,600** Grades 9, 10 & 11  
**2,800** Grade 12

**1,000** IKIC College  
LDG Recipients  
Grades 13, 14, 15, 16 & 17



### Programs

Summer Scholars  
Take COTA to College  
Fifth-Grade Ceremonies  
Go To College Month  
College Awareness Children's Book  
College Can Be Elementary Grants

Workshops  
Early Awareness Advising  
Senior Advising

[\*250 Volunteers; 10,000 Hours]

Last Dollar Grants  
Leverage Additional Funding

Since 1988, \_\_\_\_\_ has leveraged  
\$130 million of additional financial  
assistance for XPS students.

**+\$15.6 Million Last Year**

# ON VISUAL ENGAGEMENT

## BUSINESS MODELS

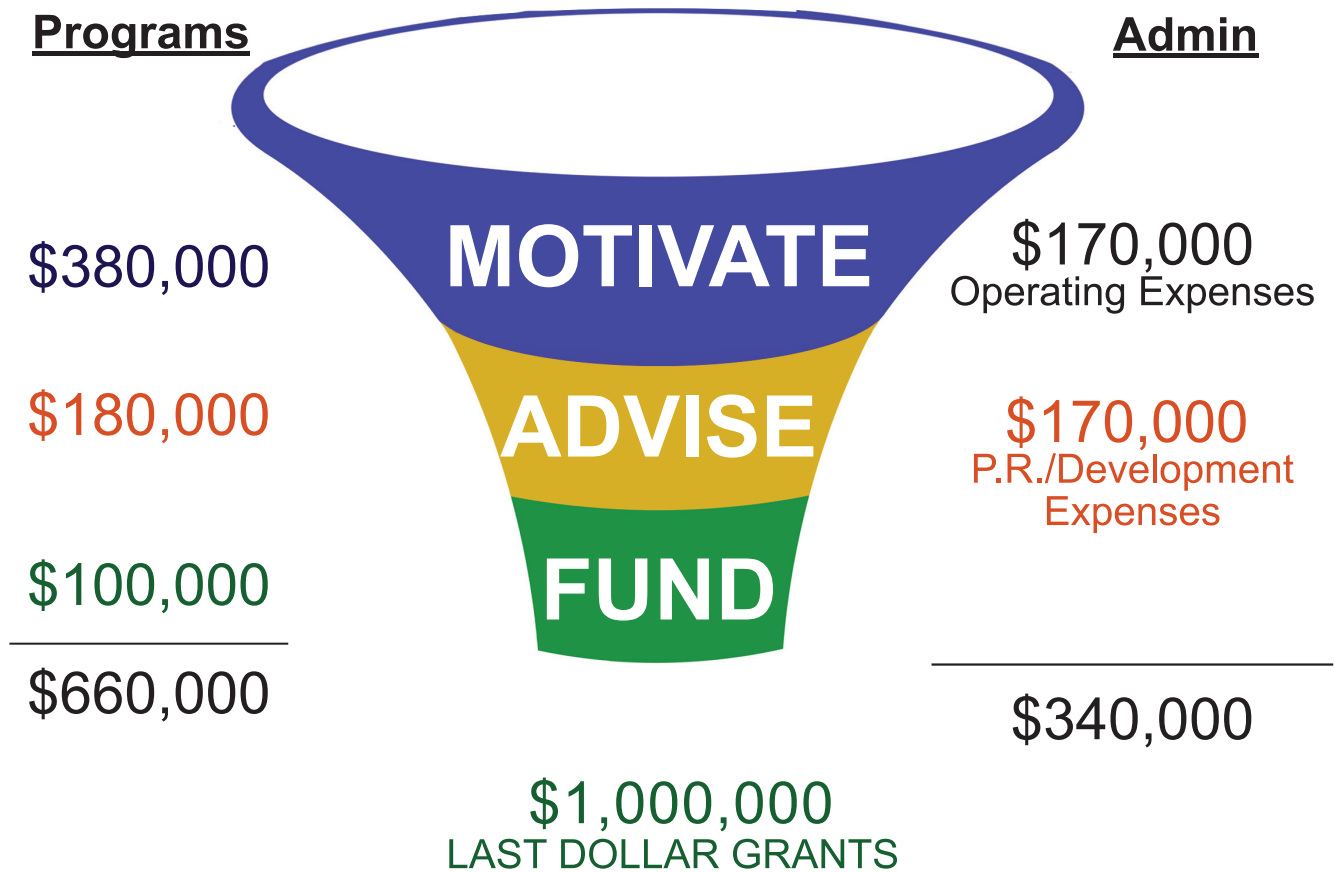
### CAP

EXAMPLE

*College Access Program*

## WHERE ... the Money goes.

**\$2,000,000 BUDGET**



## SOURCES OF INCOME

Endowment Interest	\$1,000,000
Public Schools	\$440,000
Development Efforts	<u>\$560,000</u>
	<b>\$2,000,000</b>

# ON VISUAL ENGAGEMENT

## BUSINESS MODELS



# ON VISUAL ENGAGEMENT

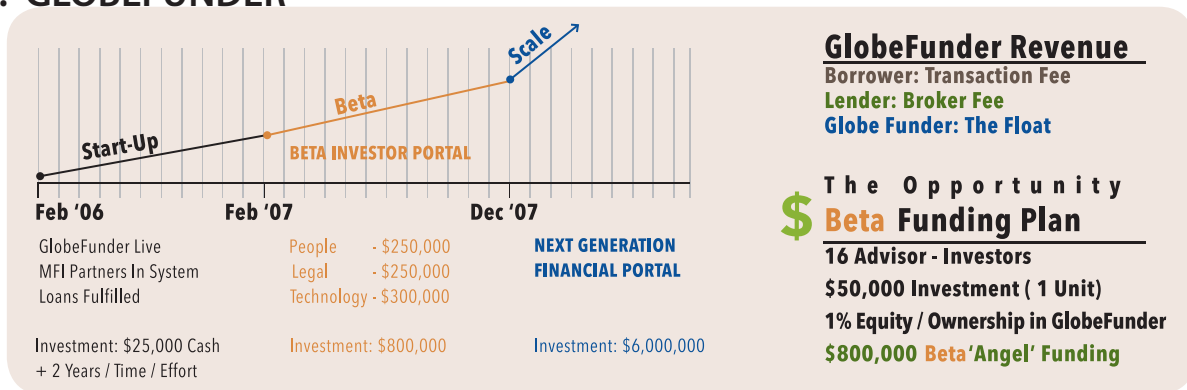
## OTHER VISUAL IDEAS

### TIMELINES

While not on the Engagement Tool Template example, we have effectively used TIMELINES as another great way to visualize the **past, present and future**.

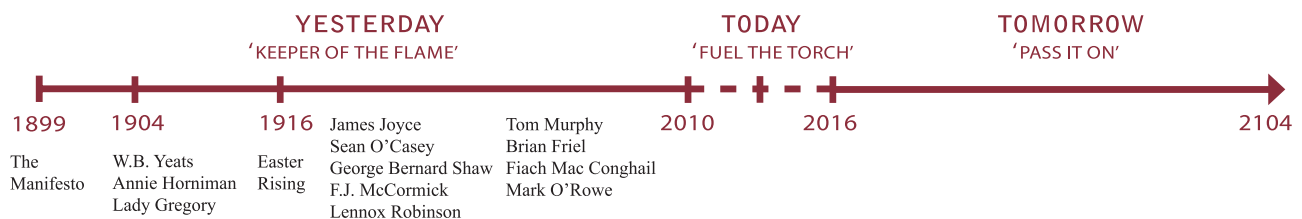
Here are 3 great examples of **how to use timelines**:

#### 1. GLOBEFUNDER



**Notes:** This timeline showed **START-UP** ... **BETA** (where the money was needed right now) ... and **SCALE**.

#### 2. THE ABBEY THEATRE (Dublin, Ireland)

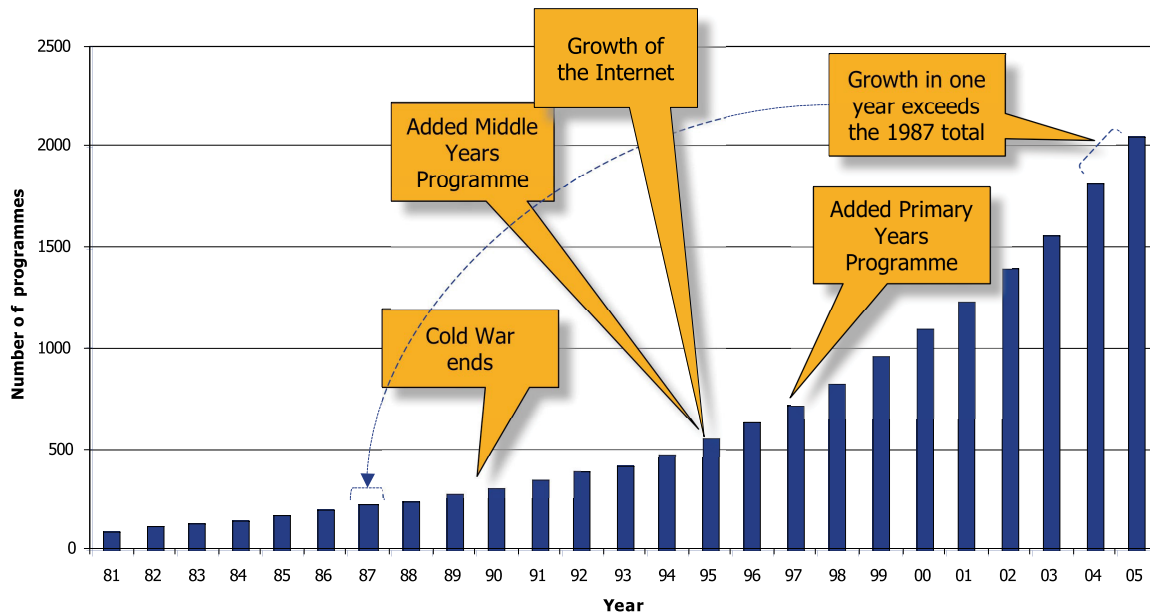


# ON VISUAL ENGAGEMENT

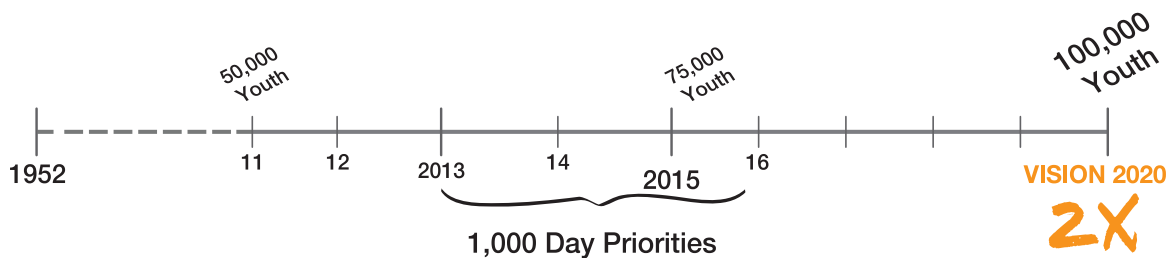
## ENGAGEMENT TOOLS

### TIMELINES (continued)

#### 3. AN INTERNATIONAL SECONDARY SCHOOL



**Bonus Example: FOROIGE.** (A world class youth development program in Ireland.) This simple timeline shows the founding in 1952 ... number of youths served in 2012 ... goal in 2015 and 2X Vision 2020.



# ON VISUAL ENGAGEMENT

## OTHER VISUAL IDEAS

### MATH & NUMBERS

Rather than presenting '**financials**' or burying all of your '**numbers**' in a brochure or pages of dense text ... figure (pun intended) out a way to **SHOW** the math and the numbers in a compelling and easily understood format.

\*\*\*Check out Feltron or Edward Tufte for more on this whole idea of infographics, visual representation of information, etc.

Here are three examples of communicating math and numbers on an Engagement Tool.









# ON VISUAL ENGAGEMENT

## OTHER VISUAL IDEAS

### BUILDING PLANS

Obviously, one of the most powerful ways to engage people in a new 'building project' is to show them the renderings, the elevations, and even the floor plans. If you're out 'selling' a capital project ... you need to take the time, creativity and energy to get your architects (or someone) to help you **visually communicate** the project! Here's a couple of great renderings **(Wolfe ... 4 to a page)** of a hospital project that also allows for **custom application** by putting someone's name on the drawings.

# ON VISUAL ENGAGEMENT

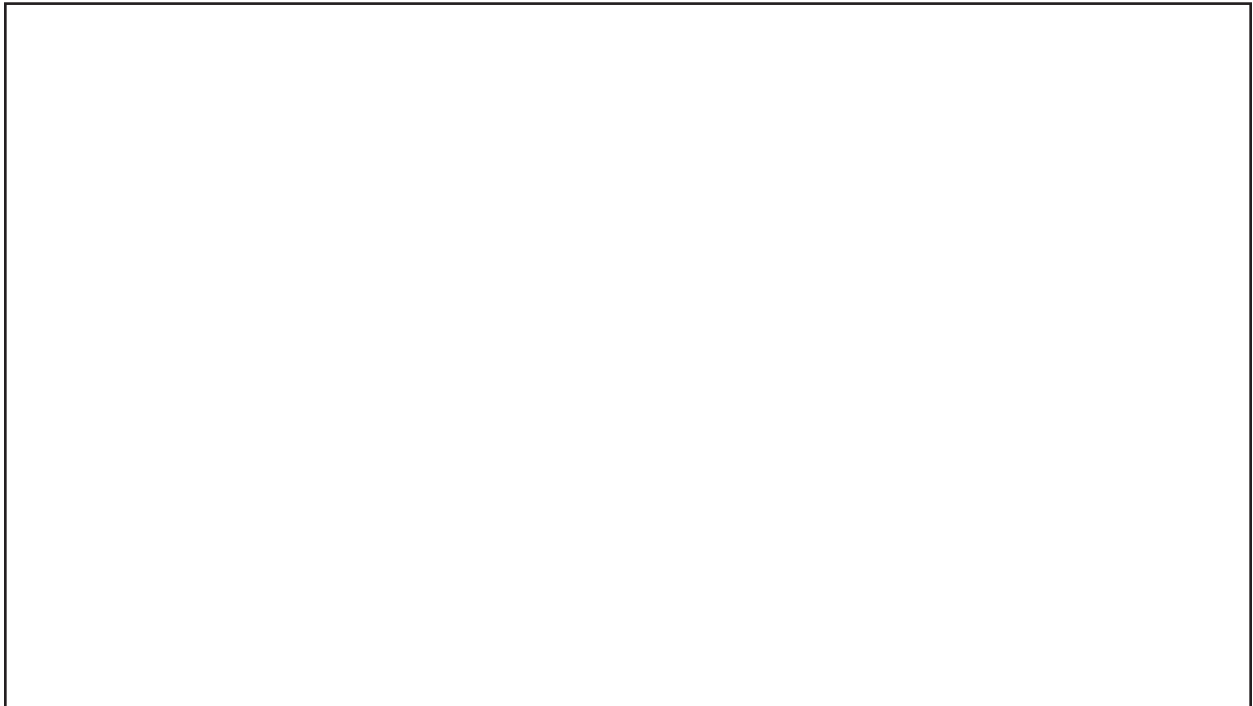
## OTHER VISUAL IDEAS

### BUILDING PLANS(continued)

**Personal Story:** In one of my past lives, I did a ton of real estate development. One my legacy projects was buying and transforming the old Indiana and Michigan power plant into Class A offices, athletic club, restaurant, etc. Located in downtown South Bend, Indiana (and actually located on the 'south bend' of the St. Joseph River), this 100,000 sq. ft. building had been vacant for 10 to 15 years.

Although I didn't know the Walt Disney – banker story at the time – I knew that going to the bank and giving them a 'bunch of numbers' on this project was not going to get anywhere.

Along with a lot (and I mean a lot) of other visuals showing the floor plans and creative use of the spaces ... I commissioned the Dean of Notre Dame's Architecture School to do two **watercolor** renderings of the building. Here there are:



# ON VISUAL ENGAGEMENT

## OTHER VISUAL IDEAS

### BUILDING PLANS



I'm pretty certain that these two drawings alone got me the \$1.2M commercial loan needed to get the project started. (Ultimately, used these to get another \$6M, if I remember correctly.)

Read, re-read Walt Disney and the Disneyland story. Replace 'bankers' with **investors**. Then do whatever you need to do to **visually** engage!

# ON VISUAL ENGAGEMENT

## OTHER VISUAL IDEAS

### THE VISION CARD

The '**VISION CARD**' is one of our most popular (and used) Engagement Tools.

These 3 ½ x 8 ½ (usually) VISION CARDS have become the '**go-to visual of choice**' for hundreds of For Impact orgs.

Their primary purpose has evolved to THE best to capture the WHY, WHAT and HOW for the Team and the Board!

I've heard this 100 ... maybe 1,000 times –

- *"We've been asking for something like this for 'X' years!"*
- *"I can finally tell the story ... in a simple way!"*
- *"I can carry this with me ... everywhere."*

You can design/build this first ... or convert the 'Blue' and 'Red' from your PURPOSE, PRIORITIES, PLAN tool.

Following is a template and some examples.

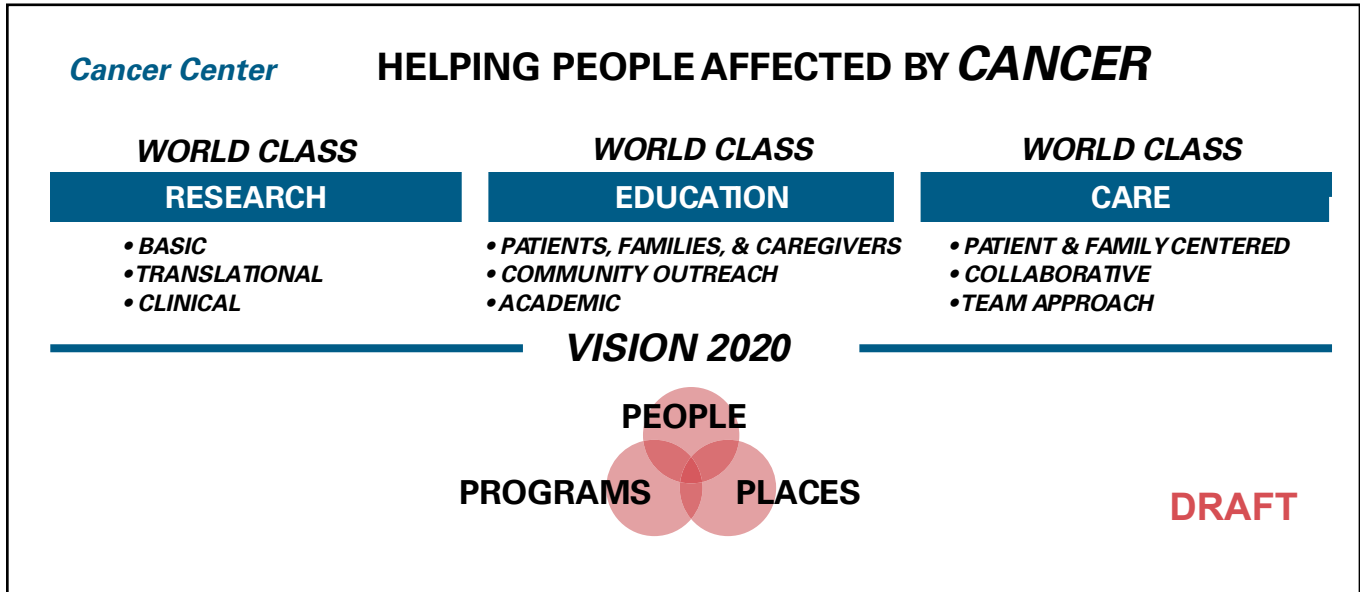
\*The first example is an amazing cancer center that brought in an ad agency to help with message/story.

Rather than a lot of text or explanation ... the best way to have you understand the *VISION CARD* is to **show** you some *VISION CARDS*!!!

# ON VISUAL ENGAGEMENT

## OTHER VISUAL IDEAS

### VISION CARD EXAMPLES



## **CANCER CENTER**

### **DISTINGUISHING CHARACTERISTICS**

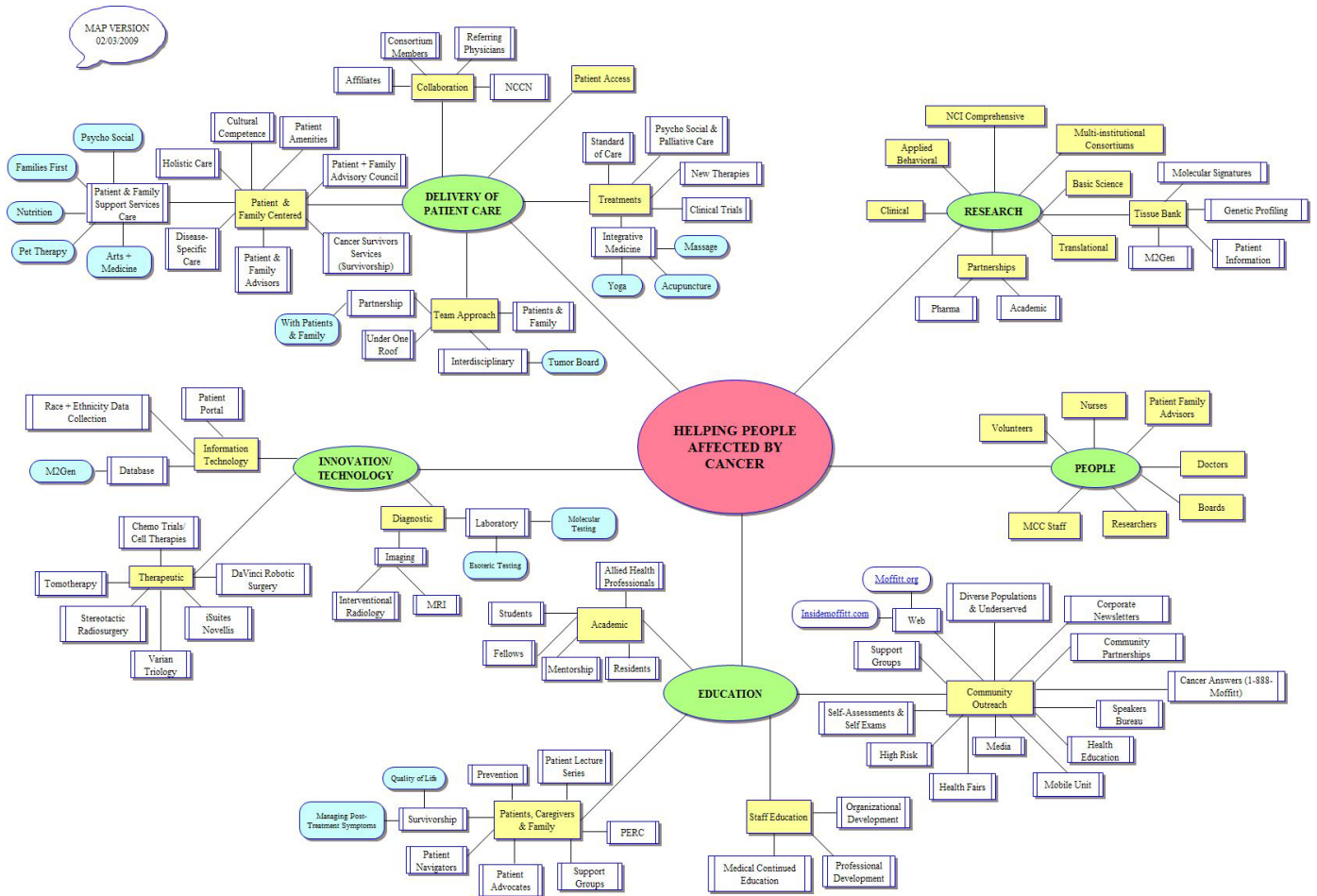
- **One mission** – to contribute to the **prevention** and **cure** of **cancer**.
- One of 40 National Cancer Institute-designated Comprehensive Cancer Centers.
- **Third largest** cancer center in the United States based on outpatient volume.
- Home of Florida's **largest clinical cancer research unit**, conducting newly developed phase I and phase II trials.
- Impacts **20 percent** of cancer cases in \_\_\_\_\_ and affiliated with **15** hospitals and more than **400** community oncologists.
- Home of \_\_\_\_\_ **largest clinical cancer research unit**, conducting newly developed phase I and phase II trials.
- **Largest** provider of blood and marrow transplants in southeastern United States.



# ON VISUAL ENGAGEMENT

## OTHER VISUAL IDEAS

### VISION CARD EXAMPLES



# ON VISUAL ENGAGEMENT

## OTHER VISUAL IDEAS

### MY ONLY VISION CARD EXPERIENCE

Here's another quick personal story about the use of VISUALS to **communicate** ... and to **close**!

In 2000, we were trying to build a platform/resource to help 'not-for-profits'. This was the pre-cursor to ForImpact.org. Ended up getting some angel investors ... and then had the opportunity to present to a venture capital firm in Illinois. (I've taken some hyperbolic license with the story to make a point.)

We drove from Columbus to Champaign-Urbana. There were six entrepreneurs/companies presenting that day. We were number four in the order. The other five all had thick (and I mean thick) Business Plans and massive PowerPoints/slide decks. We sat in the lobby and watched the others present.

Then, we walked in with this: **(Wolfie, picture of the big drawing opposite page)**

No PowerPoints. No slide deck. No Business Plan. No numbers. No five-year projections.

Just told the story of our **experience** in the sector ... and then **showed** our thinking and the potential of the concept.

The other five left with polite acknowledgement for presenting ... and absolutely no commitment/no money.

The three VC's at the meeting actually stood up, gathered around the visual on the table and let us talk them through what it meant.

Got a phone call on the way back to Columbus. ***"We'd like to invest \$1M."*** True story.

# ON VISUAL ENGAGEMENT

## OTHER VISUAL IDEAS

### MY ONLY VISION CARD EXPERIENCE

\*Paul Harvey's **rest of the story** is not as exciting. Forced to get 'grown-up management' involved in the company. Dot-com bubble burst. Cost for technology and to build platforms and backend support, etc. was astronomical. (Today, you could build everything we built for probably \$5,000 instead of a couple million.)

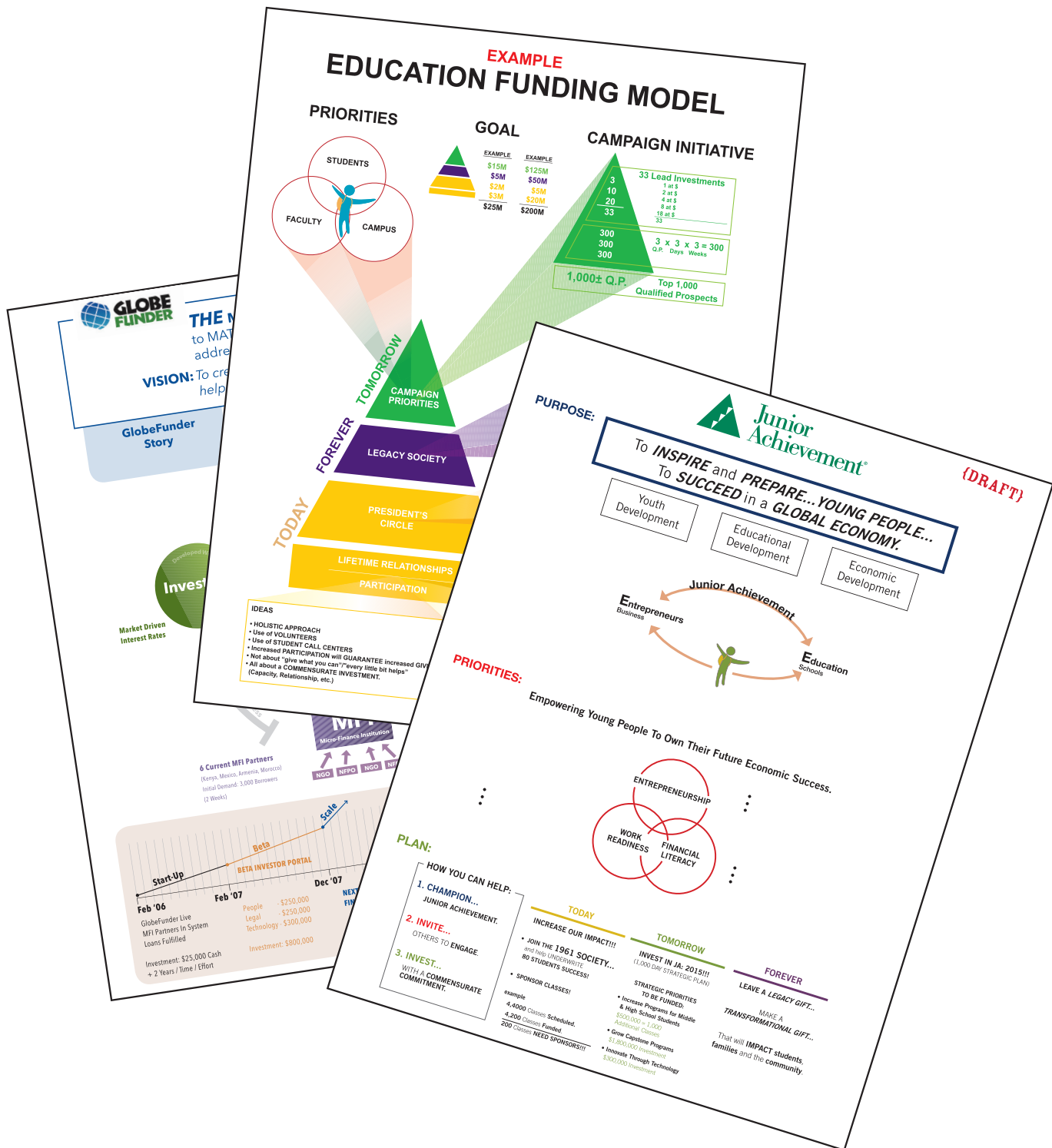
A lot of lessons here for me. Part of my 'scarred entrepreneurial veteran' label.

However ... this ultimately led to ForImpact.org and Nick and the RESOURCES you are using right now.



# ENGAGEMENT TOOL EXAMPLES

Here are a few examples of 'REAL' Engagement Tools.



\* Go to [forimpact.org/engagementtoolexamples](http://forimpact.org/engagementtoolexamples) for more!!

# ENGAGEMENT TOOL EXAMPLES

Craig Hospital 

*Caring exclusively for patients  
with spinal cord and brain injuries*

## PURPOSE

### RE-TRANSFORM LIVES...

Of Those Affected by Spinal Cord & Traumatic Brain Injury  
Through REHABILITATION, RESEARCH AND ADVOCACY.

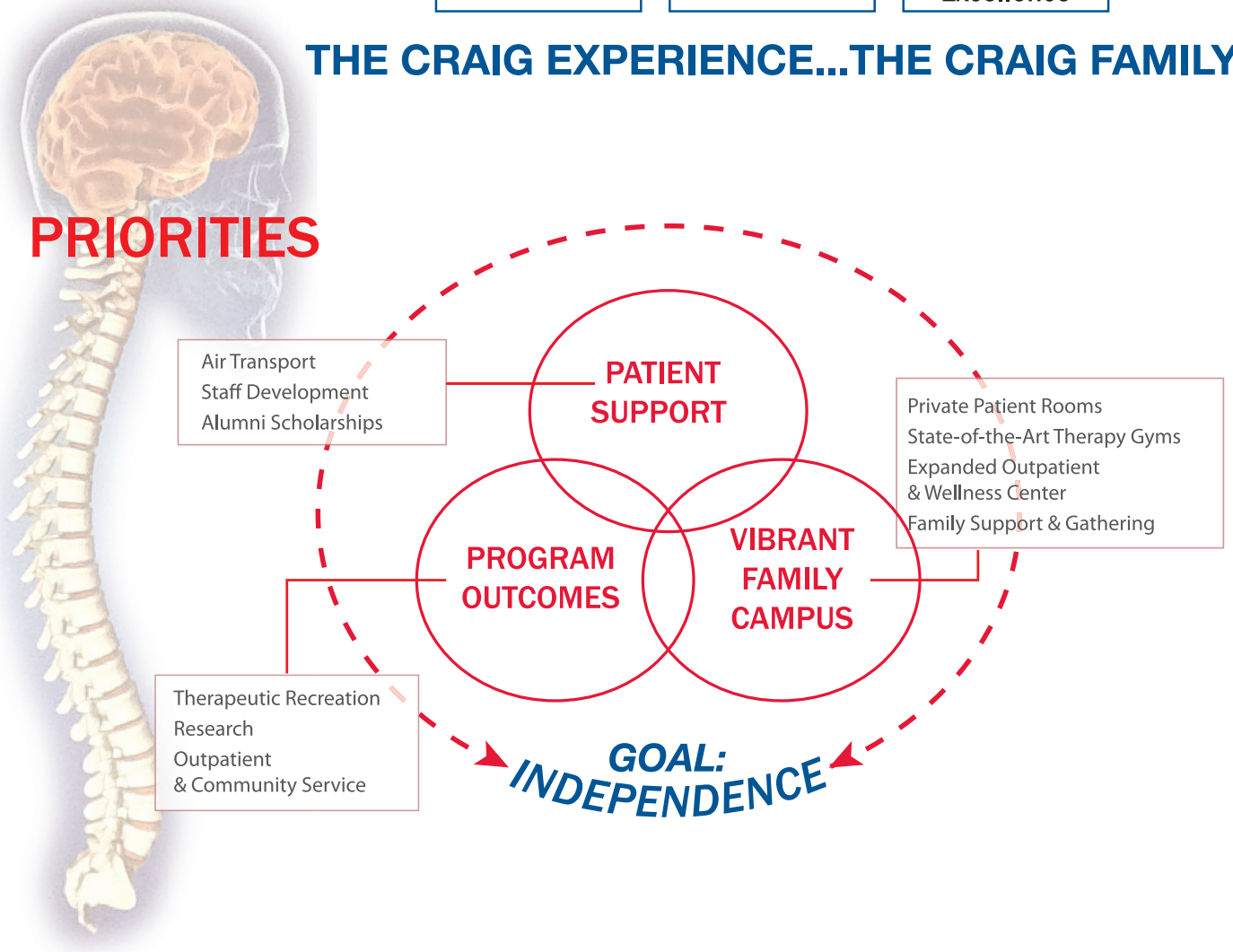
A Pioneer

More than  
a Hospital

Center  
of  
Excellence

## THE CRAIG EXPERIENCE...THE CRAIG FAMILY

## PRIORITIES



## PLAN

HOW CAN I HELP?

# ENGAGEMENT TOOL EXAMPLES

# ywca warren

eliminating racism  
empowering women

[DRAFT]

## vision

Transforming **YWCA**. Transforming **Women**. Transforming **Warren**.

A community hub for all women...  
transforming the **economic** and  
**social** fabric of our community.

“Women hold up half the sky.”

- Chinese Proverb

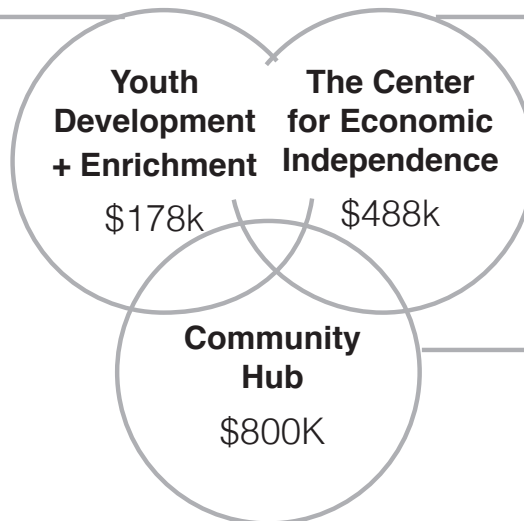
## ywca story

“Before  
it was about  
providing  
**support.**

Now  
it's about  
unleashing  
**potential.**”

## 1,000 day priorities

- Licensed School Age Childcare(K-5)
- Summer Activity & Enrichment
- Middle School Girls
- Mentoring
- YW Teens
- Racial Justice Programs



- Non Traditional Career Development
- Financial Literacy and Management
- Supportive Services
- Entrepreneurship
- Young Women's Leadership
- Micro Loans

- Education \$800K
- Health Clinic \$550K\*
- Housing: \$2.1MM\*

\* Have partners, will generate revenue

## values

Building Women's Leadership

Racial Justice

Women's Economic Advancement

## how you can help

### 1. Champion...

the **YWCA**, **Women** and **Warren**.

### 2. Invite...

others to get **involved & engaged**.

### 3. Invest...

with a **commensurate commitment...**  
(to help fund the vision.)

# ENGAGEMENT TOOL EXAMPLES

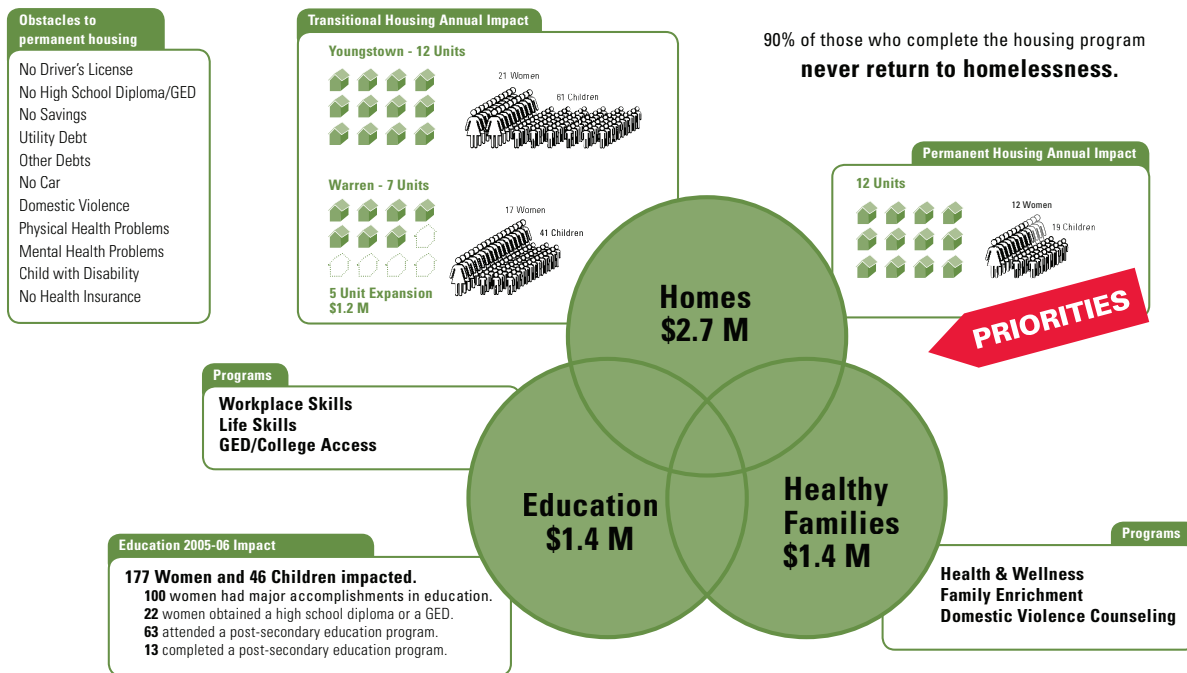


*Family House*  
2006 - 15th Anniversary

We provide the **opportunity**  
for disadvantaged *women* and *children*  
to **Transform their Lives.**

**PURPOSE**

## 1000-Day Priorities

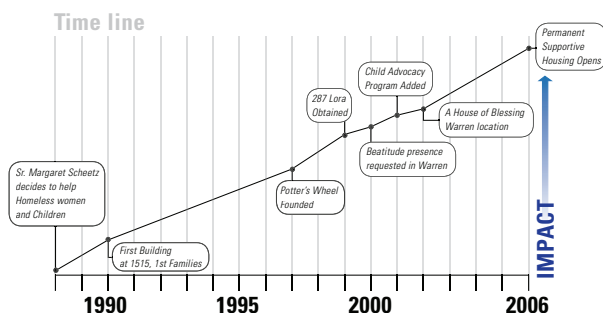


**\$22/Day (\$8030/Year)** per person  
provides a home for an individual, including  
counseling, case management and child advocacy.

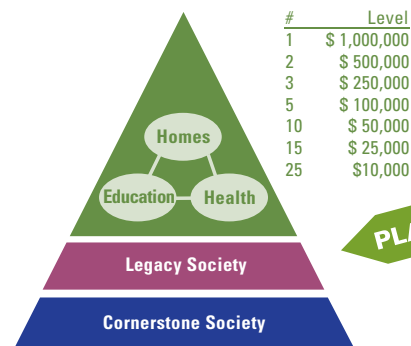
**Affording Dignity**

**Breaking the Cycle**

**Strengthening the Community**



Beatitude House served **421 women and children** in 2006.



**PLAN (Funding)**

**Funding Plan**



# ENGAGEMENT TOOL EXAMPLES



## Empire Justice Center

We make the law work for **all New Yorkers**

We improve the law to help low-income families meet their basic needs

In 2008...

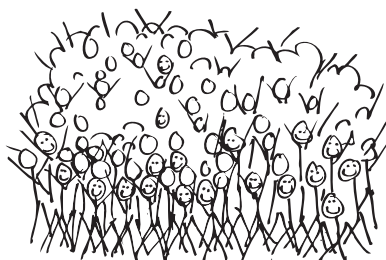
( DIRECT IMPACT )



**893** Cases

**10,539** Clients lives changed

( INDIRECT IMPACT )



FOR EXAMPLE:

Exempt Funds Protection Act of 2008 provided an immediate protection to an estimated

**400,000**

low income elderly and disabled New Yorkers.

### IMPROVE the Law

#### Legislative Administrative Advocacy

- Expand capacity to engage in administrative advocacy  
\$75K - \$100K annually
- Expand research capacity to have greater legislative impact  
\$75K - \$100K annually
- Expand capacity to manage proactive messaging on key issues  
\$75K - \$100K annually

### TEACH the Law

#### Technical Assistance

- Expand capacity to provide substantive law training and support
- Maintain and grow substantive website  
\$50K annually

### PRACTICE the Law

#### Direct Representation Impact Litigation

- Strengthen litigation capacity  
\$200 - \$250K annually
- Bring 4 new impact cases annually

#### Our Vision For The Next 3 Years And Beyond

[1] To develop the next generation of experts in Public Assistance, Housing and Immigration

[2] To expand our scope as WATCHDOGS (a.k.a. Administrative Advocacy)

[For example, current Child Care laws mandated by the state create barriers to securing child care and ultimately maintaining employment.]

**[DRAFT]**

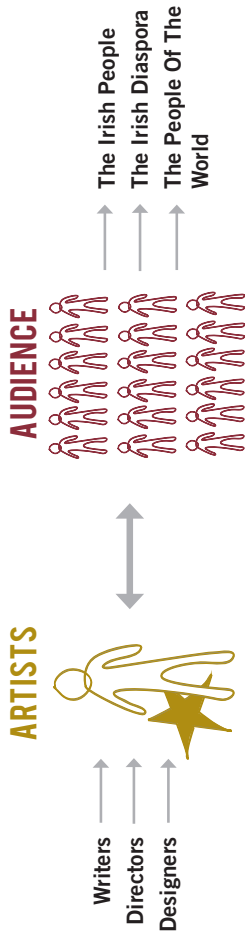


# THE NATIONAL THEATRE OF IRELAND

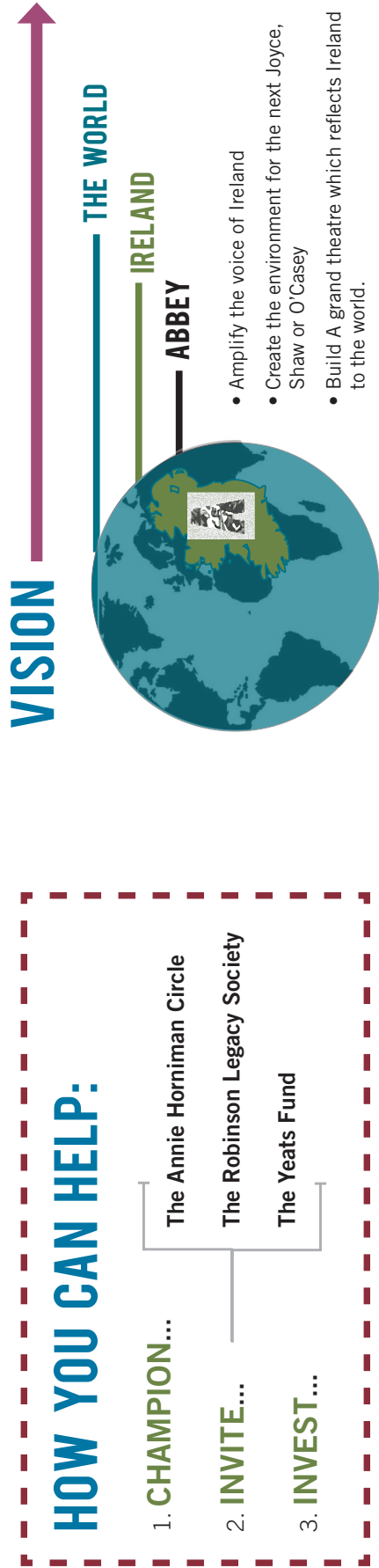
“The Magic... The Heart... The Voice.”

“Life is like a torch.  
You fuel it as best you can,  
then pass it on.”

— George Bernard Shaw



<b>1899</b>	The Manifesto
<b>1904</b>	W.B. Yeats Annie Horniman Lady Gregory
<b>1916</b>	James Joyce Sean O’Casey George Bernard Shaw F.J. McCormick
<b>2010</b>	Lennox Robinson Tom Murphy Brian Friel Mark O’Rowe
<b>2016</b>	
<b>2104</b>	



## HOW YOU CAN HELP:

- 1. CHAMPION...**  
The Annie Horniman Circle
- 2. INVITE...**  
The Robinson Legacy Society
- 3. INVEST...**  
The Yeats Fund

# ENGAGEMENT TOOL EXAMPLES



**DRAFT**

**VISION 2015**

## PURPOSE

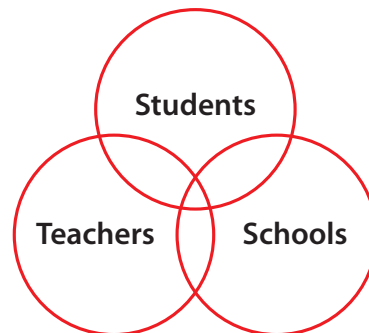
**TRANSFORMING IRISH EDUCATION  
SMASHING THE VICTORIAN CLASSROOM**

**FOUNDER'S  
STORY**

**TUGBOATS  
&  
BARGES**


**TEAMS  
&  
TECHNOLOGY**

## PRIORITIES



## PLAN

### THE QUANTUM LEAP



	2005-2009 FOUNDING	2010-2011 TESTING	2011-2012 DOING	2012-2013 SCALING
STUDENTS	—	400	8,000	20,000
TEACHERS	—	20	80	200
SCHOOLS	—	5	8	25
INVESTMENT:		€150K	€250K	€500K

# ENGAGEMENT TOOL EXAMPLES

DRAFT



St. Benedict's Preparatory School

## The Community

### Purpose



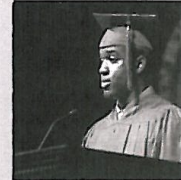
#### Inner City Young Men

- Meet 100% of Financial Need
- Demand Excellence



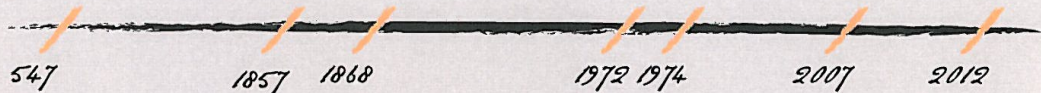
#### Rule of St. Benedict

- Focus on Stability
- Focus on Tradition



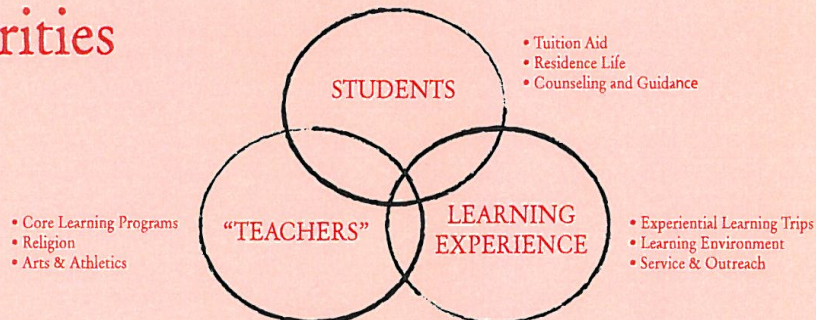
#### Transforming Lives

- Leadership Training
- 95% of Graduates go to College



*"Whatever hurts my brother, hurts me."*

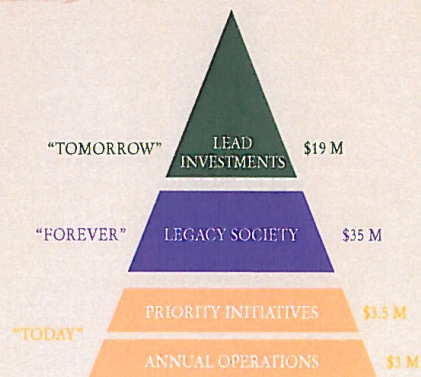
### Priorities



### Plan

How you can help... NOW:

1. CHAMPION ...  
St. Benedict's
2. INVITE ...  
others to ENGAGE
3. INVEST ...  
with a COMMENSURATE COMMITMENT



KT 10107