

# Dollars & Sense



## ABOUT THE AUTHOR...

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Dr. Johnston has spent his entire career working on behalf of non-profit organizations. A well-known development consultant and lecturer, Larry has taught at the Graduate Program of Fund Raising Management, the University of San Diego, and lectures at conferences internationally.

He holds an M.A. degree in Organization Development and a Ph.D. in Human and Organizational Systems from the Fielding Graduate Institute. Larry's doctoral research resulted in the creation of new concepts for determining and maximizing donor value.

Having consulted internationally with clients in Canada, Europe and Latin America, he has a special interest in strategic management and organization development, and leading and managing organizational change. Larry and his wife Rebecca live in Woodland Park, Colorado.

Laboring on the front lines of major donor cultivation and solicitation can be exhilarating and highly rewarding — both for the field representative and his or her organization. Here are some suggestions that can improve the experience both for individual reps and those who manage their activity.

## Practical Tips for Field Reps

by Larry F. Johnston, Ph.D.

The brilliant Prussian military strategist, Karl von Clausewitz said something we all need to hear:

*“It is a serious error to attribute to strategy a power independent of tactics.”*

Translation: It doesn't matter how grand your strategy is. If your tactical execution isn't sound, you're up the proverbial creek!

While an adequate treatment of strategies and tactics for field representative programs is clearly beyond the scope of a single article, here are some “Should have” and some “Should do” items that are part of any sound field rep operation:

### Should Have:

- **Strategic Plan** – The organization should have a strategic plan showing where it is headed and what the top priority programs, projects, and initiatives are for the next three to five years. Donors aren't obliged to underwrite the organization's pursuit of directional clarity, so make this clear in the strategic

plan before major donors are approached. My personal preference is for *strategy maps* based on the Balanced Scorecard that make the organization's strategy *visual* and thus more easily comprehended by staff as well as “uninitiated” outsiders.

- **Case for Support** – The case for support is essentially an investment prospectus documenting the organization's mission, vision, major programs, projects, and initiatives along with their timeframes and costs. Presented in an attractive format, usually in print, the case should marshal every persuasive argument the organization can muster to answer the question in the mind of the prospect, “Why should I give to you?”
- **Territory Plans** – Each rep should be assigned an explicit territory, remembering that in marketing “territory” need not be geographical. For example, “Mega” or “VIP” donors – those giving at certain dollar levels or above – can

constitute a territory. At minimum, each territory plan should include:

- ◆ *a description of the territory* – geographical and/or financial
- ◆ *territory objectives* – e.g., increasing the number of major donors, increasing the number of new major donors, etc.
- ◆ *key performance indicators (KPIs)* – roughly a half-dozen critical metrics where consistent, quality performance will ensure success.
- ◆ *initiatives or action plans, timetables* – what specific steps will be taken to reach objectives and KPI targets within what timeframes.

- **Account Plans** – Account plans are succinct plans for *each* donor or prospect within a rep’s territory or portfolio. Accounts should be stratified (e.g., Mega, VIP, A, B) in terms of giving history or gift potential. In some cases, accounts may include people who are in the rep’s portfolio for reasons of strategic relationships and influence rather than historic donor value or future gift potential. Keep in mind that in a typical distribution, 20% of your accounts may represent 80% of giving potential, so don’t fall victim to a misguided egalitarianism that seeks to treat them all equally. You can be strategic or you can be egalitarian, but you cannot be both!

Depending on the number of accounts in different strata, you might spend 60% of your time with your top tier accounts, 30% of your time

with your second tier accounts, and only 10% of your time on your third tier accounts. The absolute bare minimum of an account plan should be the dollar target or ask amount you will be seeking from each donor or prospect.

- **Calling Plans** – Calling plans add more detail to account plans but the format of these plans should always follow the ABCs: *accuracy, brevity, clarity*. Calling plans should succinctly specify cultivation and solicitation activities for each account in a thoughtful sequence with target dates for completion of each.

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- **A Management System** – A good management system will motivate reps and hold them accountable for *performance* (an effort measure), *productivity* (a results measure), and *profitability*. High performers should be recognized and rewarded; modest performers should be coached and encouraged; con-

sistently poor performers (when the poor performance is their fault rather than the organization’s) should graciously be released. Any good management system will entail good metrics and reporting, with KPI reports generated no less than monthly.

Relative to each of these items, remember what Abraham Lincoln said: “If I had six hours to chop down a tree, I’d spend four hours sharpening the ax.” If you find yourself trying to strategically raise funds without the above elements of a field rep system in place, it’s probably time to head back to the shed to sharpen the ax.

### Should Do

In addition to having the tools above, here are some things good reps do. The best reps do them *consistently*:

**Pray!** – Having great skills and abilities is vitally important but they’re no substitute for wisdom, discernment, and the favor from On High that are the result of concentrated “closet” time. (Major Ian Thomas is reported to have said, “There is nothing more pathetic or nauseating than human flesh trying to glorify God!”) If prayer is indeed the slender nerve that moves the muscles of Omnipotence, the failure to pray is profoundly counter-strategic!

**Focus!** – knowing what matters most, the best reps refuse to get stuck in the thick of thin things like organizational red-tape, fruitless activities and time-wasting antics, and the “grip and grin” rituals that entail

endless lathering but never shaving. The best reps are acutely aware of the difference between hunting and mere hiking.

***Listen!!*** – My partner, and the guy I still consider the “Dean of Development” after 33 years of partnership, says there are four keys to success in major gift fundraising: 1) Get involved in the *lives* of these folks; 2) Discover what *their* hopes and dreams are; 3) Show them how your organization can be a great vehicle for the realization of those hopes and dreams, and: 4) Challenge them to make those dreams come true *now*. Discovering the hopes and dreams of donors and prospects can’t be done without asking smart questions and elevating *listening* to an art form.

***Measure*** – Good reps may take some things by faith, but personal performance isn’t one of them. The best reps don’t wait to have their work measured; they would measure their own work whether or not anyone else did and use these measures in a disciplined way to consistently improve performance against quantifiable targets. They’ll measure *lag* (efforts or performance drivers) and *lead* (results) indicators and will strive to focus on the critical few activities that yield the greatest fruit.

***Learn*** – In today’s marketplace, if

you’re not getting smarter, the sad truth is you’re getting dumber. (The amount of information on deposit at today’s colleges and universities is *doubling* every three to four years.) You can rest assured that the competition is raising the bar in terms of their knowledge base, and all you have to do to fall behind is move slower than your competitors (In today’s marketplace, “It’s not the big that eat the small, but the fast that eat the slow.”) The best reps, like the best leaders and managers, are lifelong learners with an insatiable desire to improve their knowledge, skills and performance.

***Ask!*** – It’s tragic but true. Some reps never get around to asking for the gift. Perhaps they feel that “hope” is a strategy and “hinting” a sound tactic. There’s simply no doubt about it: of all the reasons why people give, the most important is that someone *asked*. The wisest reps don’t ask people to give *to* the organization, but *through* the organization to those it serves in Christ’s name.

***Persist*** – Field rep work is clearly not for the faint of heart. The work can be wearying and the temptation at times is to throw in the towel. Many failures in development can be attributed to those who quit not knowing how close they were to success.

For help in training field representatives or shaping your organization’s major donor strategy, contact any M/J consultant (see [mccconkey-johnston.com](http://mccconkey-johnston.com) for contact info). Or send an e-mail directly to Larry Johnston at [larry\\_johnston@mccconkey-johnston.com](mailto:larry_johnston@mccconkey-johnston.com).