



THE FOUR DECISIONS AND THE BOSS

A Workshop for Shared Success

The dynamic relationship between the frontline fundraiser and the head of your organization (CEO, Executive Director, Dean, Doctor etc.) presents some distinctive challenges you must address to be successful. When you strengthen your relationship you strengthen results.

Our workshop overlays your working relationship with your boss on the four decisions every major donor will consider during your efforts to build a gift relationship. Once you understand your respective roles in this decision-making process you're both better equipped to maximize your shared success.

Sample Half-Day Workshop Schedule

★ Hour One: WHY

- ✓ Start with your WHY – an exercise on personal storytelling
- ✓ How to discover your future donor's WHY

★ Hour Two: WHAT & HOW

- ✓ Explore your respective strengths
- ✓ Explore **WHAT**: the various ways through which a donor can make a lasting impact -- an overview of mission, vision, funding priorities, naming opportunities
- ✓ Case Statement Briefs and Pre-Proposals – vital tools to help your donors discover WHAT they want to fund
- ✓ An exercise on your elevator speech. Practice in context
- ✓ Briefing on **HOW**: an introduction to major gift strategies and vehicles, both outright and deferred. This is where the partnership with the fundraising professional is key.

★ Hour Three: WILL YOU?

- ✓ Solicitation Checklist and the boss' role in solicitation
- ✓ Referrals Worksheet
- ✓ Wrap Up, post-workshop assignments