

A close-up photograph of a pair of hands cupped together, holding a small amount of dark soil. A young green plant with two leaves is growing out of the soil. The background is dark and out of focus.

THE SIGNATRY WEBCAST WITH ZACH CLARK

HOW TO GROW
SIGNIFICANT GIVING



OUR TIME TOGETHER

CLARIFY
YOUR
MESSAGE

KNOW YOUR
NUMBERS

DEFINE
YOUR
PROSPECT
PLAN

MOVE PEOPLE
THROUGH THE
DONOR
JOURNEY

FOCUS ON
THE
ESSENTIALS

Your Next Steps

**Access free resources and
schedule time with our team**

developmentandleadership.org/signatry/

Email me: z@developmentandleadership.org

Call us direct: 314-403-0778

Text Zach on his mobile: 314-403-2561

UNLEARN WHAT WE KNOW

“...the discipline of growing real relationships with people, helping them see what God is doing, and then challenging them to have the impact that only they can have.”

Do you have a resource problem?

People Problems

Why does your organization exist?

Giving is the. . . **fuel that drives us forward.**

YOUR MESSAGE

SAVING OR CHANGING LIVES

PROFILE OF YOUR VISION

KEY QUESTIONS

GIVING DRIVEN STEPS

STEP 1
COMPLETE

STEP 2

STEP 3

STEP 4

YOUR VISION AND VISION PROFILE

HOW WE GOT HERE

OUR PLAN AND PRIORITIES

GIVING DRIVEN STEPS

STEP 1
COMPLETE

\$ Given

STEP 2

Goal

STEP 3

Goal

STEP 4

Goal

MILESTONES

- PROJECT
- PROJECT
- PROJECT
- PROJECT

YOUR CORE 4 GOALS

Your 4 most important numbers you need to know *every week*:

1. What is our long term giving goal (within 3-5 years or end of next year)? = \$

2. What is our progress to date toward our long-term goal? = \$

3. What is our goal for this giving year (calendar year, by December 31)? = \$

4. What is our near-term milestone that we are working toward (end of June/July)? = \$

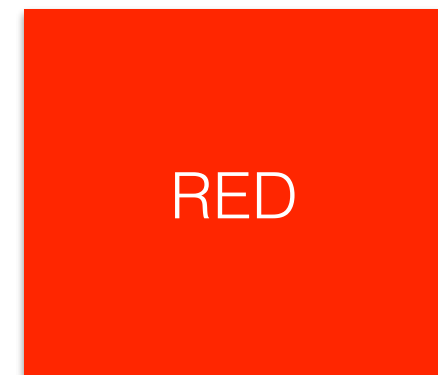
PROSPECT PLANNING

FIRST WHO, THEN HOW

A prospect plan is simply a *list*.

PROSPECT PLANNING

FIRST WHO, THEN HOW



ADVANCED PROSPECT PLANNING

DONORS TO RETAIN

- List from highest to lowest in total giving for the year
- Establish a target amount, range, or commitment level for each and every one
- Calculate the possible low and high totals

DONORS TO REGAIN

- List from highest to lowest in total giving
- Go back 5-7 years
- Calculate the total potential giving of donors to retain group

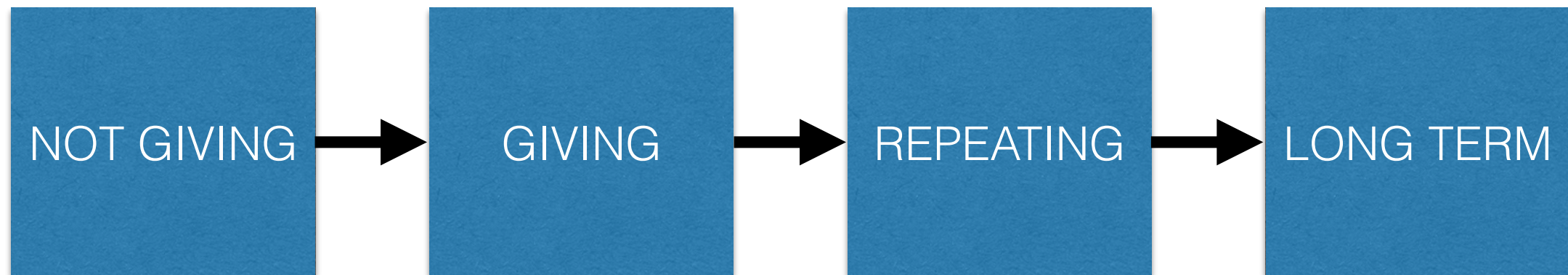
DONORS TO RECRUIT

- People who are new to your audience/community
- People who attend experiences
- People who have been referred to you
- People *selected* from your non-donor list

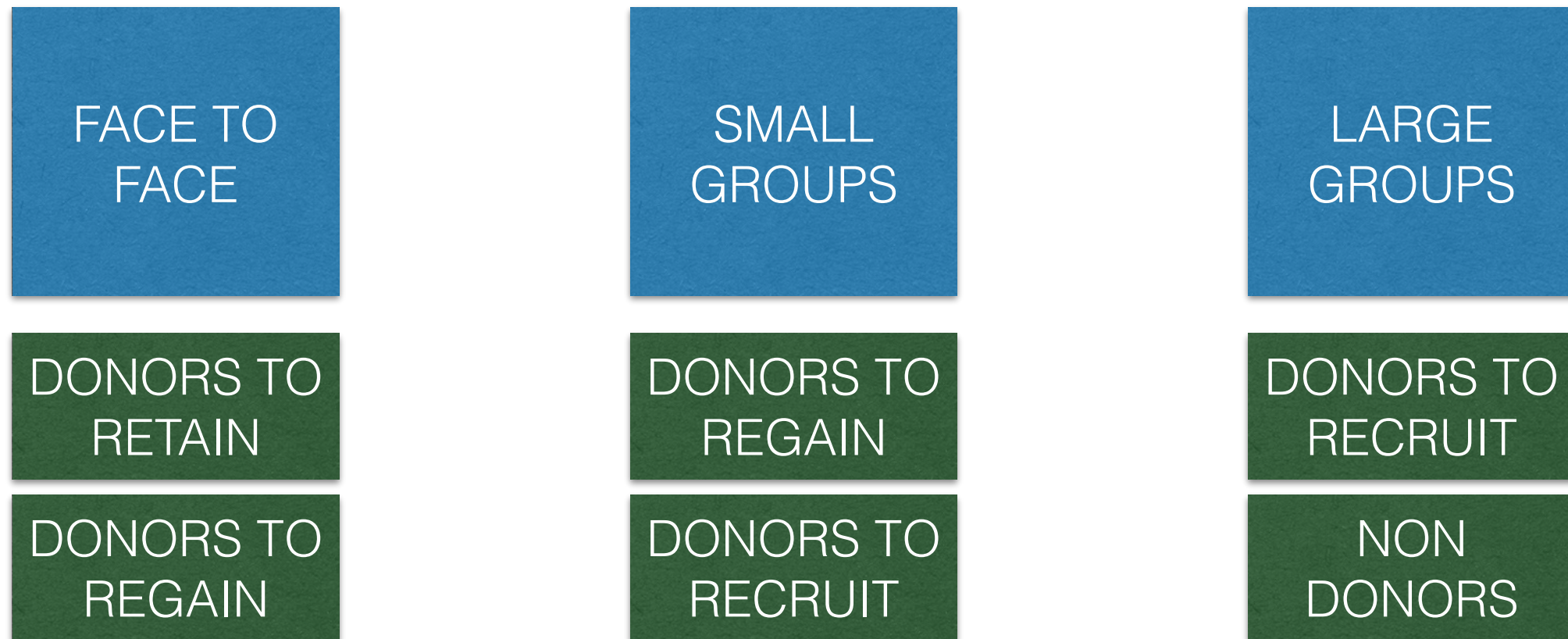
NON-DONORS

- Identify who to release
- Identify who to recruit, and add to your donors to recruit list
- Look for ways to stop training them to not give; stop soliciting
- Provide quality communication and experiences that add value

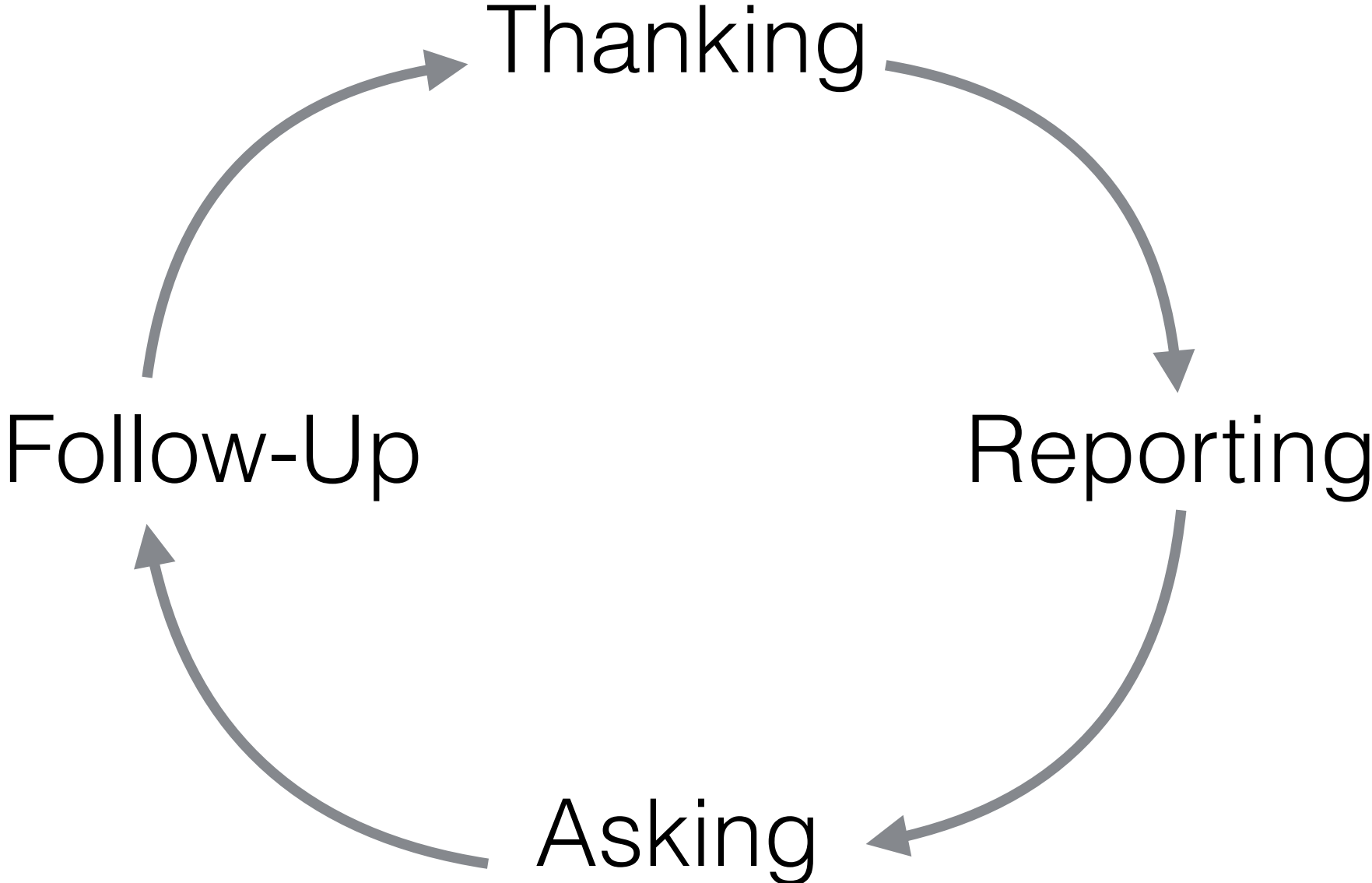
A GIVING-DRIVEN APPROACH



DEVELOPMENT STRATEGY



THE DONOR JOURNEY



The Donor Journey—>		Thanking	Reporting	Asking	Follow-Up	Thanking	Reporting	Asking	Follow-Up
Select Strategy	Select Prospects								
Face To Face	Retain Regain Recruit	Initial Meetings, Reporting Meetings		Ask Meetings, Follow-Up Meetings Update Meetings		Initial Meetings, Reporting Meetings		Ask Meetings, Follow-Up Meetings Update Meetings	
Small Groups	Retain Regain	Leadership Briefings/ Task Forces and Advisory Groups		Vision Events		Leadership Briefings/ Task Forces and Advisory Groups		Vision Events	
	Recruit	Vision Events, Volunteering				Vision Events, Volunteering			
Large Groups	Retain Regain	Reporting Communication w/ Follow-Up		Asking Communication w/ Follow-Up Series		Reporting Communication w/ Follow-Up		Asking Communication w/ Follow-Up Series	
	Recruit	Announcement, Kickoff, or Informational Events		Event Fundraisers, Ask Events, Celebrations		Announcement, Kickoff, or Informational Events		Event Fundraisers, Ask Events, Celebrations	
Timeline—>		January - July				August - December			
Planning Questions		<i>What opportunities already exist? How can we integrate our vision and priorities? What can we Automate? Delegate? Innovate? Eliminate?</i>							

DISCIPLINES AND HABITS

PLANNING

- Reinvent yourself every year
- Simplify, Delegate, Eliminate, *then* Improve
- Evaluate your capacity and discretionary time
- Use a Model Week

PEOPLE

- Do a full accounting of your influence
- Use a Weekly Scorecard**
- Use First Meeting Disciplines
- Thank people every day/week

FOLLOW-UP

- Identify the next action
- Use a memo or email of understanding
- Calendar your follow-up
- Use a long-lasting follow-up list**

YOUR WEEKLY SCORECARD NUMBERS

How many face to face meeting blocks do you have held on your calendar in the next six weeks?

?

How many face to face meetings do you actually have scheduled for the next six weeks?

?

How many face to face meetings did you have this past week?

?

How many people are on your follow-up list?

?

THE ESSENTIAL CHECKLIST

- Clarify your vision and plan in the form of a simple Development Message.
- Have total clarity on your Core 4 Goals
- Build simple Prospect Lists
- Select the 100-200 individuals to focus on and seek longer term giving commitments
- Prepare to implement the Donor Journey across all 3 strategies for growing giving
- Use a weekly scorecard to focus on the leading indicators for giving.
- Use your follow-up list to evaluate how well you are positioning yourself to achieve your goals.

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