

RULES OF **ENGAGEMENT**



TOM SUDDER

www.forimpact.org

DISCLAIMER

These (PDF)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.

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RULES OF **ENGAGEMENT**

Martin Luther King said,

“I have a dream!”

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

Andy Grove of Intel fame said,

“ENGAGE. THEN PLAN.”

Goose said to Maverick, in *Top Gun*

“ENGAGE, MAV, ENGAGE!!!”

RULES OF **ENGAGEMENT**

INTRODUCTION

The last couple of years have been economically difficult, and led to a lot of EXPERIENCES.

Now is the time to play off those EXPERIENCES and focus on *'ENGAGEMENT'!*

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

Nota Bene (Note Well): Just so there is no confusion, **ENGAGE** means VISIT... SHOULDER TO SHOULDER... OUT of your OFFICE!!!

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

- Newton's Law

I'm no physics major, but I get this.

ENGAGE means GET IN MOTION!!!

You can hide under your desk because of the economy, call reluctance, whatever...

OR you can buy into our **IMPACT DRIVES INCOME** insight and epiphany.

More INCOME creates much more **IMPACT**.

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

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

More VISITS!!!

Go Forth and **ENGAGE!**

*Dom
(O.G.)*

RULES OF ENGAGEMENT



Our two miniature donkeys, Princess and Daisy.

As my 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.

RULES OF ENGAGEMENT

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? 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’ 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.*’

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

THEN you will see immediate, transformational investments.

This principle of laser-like FOCUS is the single greatest attribute of most successful people.

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

THEN... you will continue to end up with a horrible RETURN on investment and energy.

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 during this year of 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’!**

Special Note: In the world of **ENGAGEMENT**, the best of the best learn how to make a *Today, Tomorrow, Forever*, **‘TRIPLE ASK’!**

Getting It 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 .

RULES OF ENGAGEMENT

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

- 1. SIMPLIFY YOUR MESSAGE.**
- 2. BUILD YOUR CASE FOR SUPPORT.**
- 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 this ENGAGEMENT STRATEGY!**
- 9. Commit to SHARING THE STORY and PRESENTING
THE OPPORTUNITY!!!**
- 10. JUST ASK. JUST ASK. JUST ASK.**

RULES OF 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 CASE FOR SUPPORT!

What is the VALUE PROPOSITION? 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?

RULES OF ENGAGEMENT

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

Use a Napkin, Vision Card, Map, 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 PRESENTATION 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 and 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 the year with your best shot at your MPL!

Of critical importance is your top **3** plus your next **10** plus your next **20!** (33.)

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*

RULES OF 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.*

RULES OF 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 the YEAR OF ENGAGEMENT.

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

You are 3° 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!)

‘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 **60,000** push-ups a year. (1,000 push-ups x your age). The SIMPLE EXECUTION is **180** push-ups, (3 sets of 60) **a day... every day**.

The point is that you can’t skip 3 days a week. 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).

RULES OF 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!!!

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

Again.

RULES OF 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

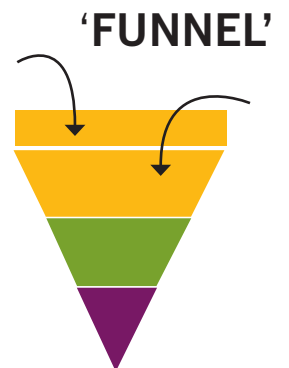
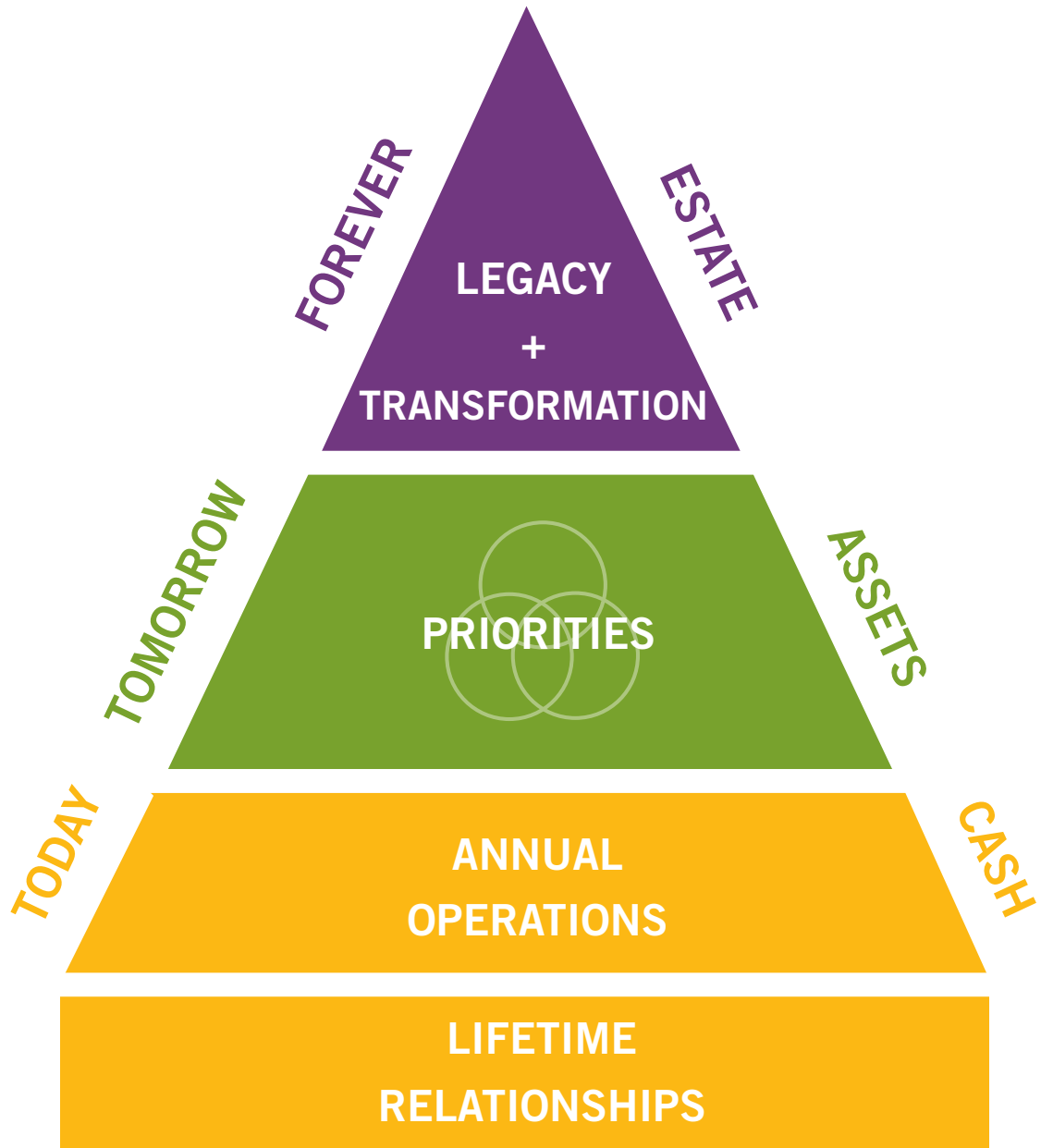
	REVENUE	EXPENSES (Direct/ Indirect)	NET \$
Direct Mail/annual Fund			
Special Events (Golf, Gala, etc)			
Grants			
Planned Gifts			
Major Gifts			
Etc.			

*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.

RULES OF **ENGAGEMENT**



ABOUT TOM SUDDES

Tom Suddes has 35 years of experience in Development, Strategic Visioning, Campaign Management, Sales and Business Start-Ups. He has made a name for himself as a THOUGHT LEADER, COACH, TRAINER, CONSULTANT, SPEAKER and WRITER.

Tom has been labeled CONTRARIAN, RADICAL, WHACKY, CRAZY... and is widely known as a MAVERICK and an AGENT of CHANGE.

He began his career in the Development Office at the University of Notre Dame in 1973; and was Director of Development for The Campaign for Notre Dame, which went \$50 Million over its \$130 Million Goal.

In 1983, he founded The Suddes Group, which has managed over **400 campaigns** and raised over **\$1 BILLION**. Tom and his partner Nick Fellers have also coached organizations towards another **\$1 BILLION**. The Suddes Group also helped generate **3 million new jobs** in their work with 125 economic development organizations around the country.

He has made more than **6,000 one-on-one presentations** (sales calls); and has trained **thousands** of 'NONPROFIT' leaders in the art and science of being a FOR IMPACT organization. He also SPEAKS and provides TRAINING throughout the country for entrepreneurs, sales people and leaders in both the not-for-profit and the for-profit sector, including keynotes and national presentations to the most recognized 'brands' in the 3rd Sector.

Tom has authored numerous publications of his thinking, and much of the content at forimpact.org.

A SERIAL ENTREPRENEUR since age 16, Tom has founded 19 businesses (his kids say he can't hold a job). He was the first Entrepreneur-In-Residence at the Gigot Center for Entrepreneurial Studies at Notre Dame; and is now committing one-third of his time to helping Social Entrepreneurs through his work with Sparkseed, StartingBloc and Unreasonable Institute. (He is finishing a book on his entrepreneurial life lessons titled, *Entrepreneurial Spirit*.)

In 1996, Tom **won a trip around the world** (in the only contest he has ever entered) when **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. 23 Days. 32,000 Miles. The Experience of a Lifetime.

Tom served in the U.S. Army as an Infantry Officer, Airborne and Pathfinder; was a two-time welterweight boxing champion at Notre Dame; and has been the boxing coach at Notre Dame for 38 years (returning every year for a six-week 'mini-sabbatical' to coach and referee the Bengal Bouts).

Throughout his crazy, eclectic life, Tom has been anchored by his wife Trudy and five wonderful children (who have somehow overcome their father as a huge life impediment). Now, his seven grandchildren, Savannah, Keegan, Calvin, Thomas, Tatum, Roscoe and E.J. are the centerpiece of life on a 50-acre farm and training center outside of Columbus, Ohio.