Your Relationship Building Checklist

Coastal Bend Community Foundation
Our Goal

• Joyful, Inspired, Generous Investments of Personal Capital
Being All In

Personal Capital

Human

Financial

Network

Intellectual

Ernie Ludy, Founder Medstat
Roles and Behaviors

1. Informed ambassadors
2. Effective advocates
3. Engaged with the mission, vision and work
4. Aligned values
5. Providers of wisdom and expertise
6. Networkers and connectors
7. Generous donors
8. Involved with helping bring in revenue and gifts-in-kind
To get there, we build meaningful and productive relationships
Trust at the Heart of the Matter
How to Use the Checklist
Strengthen and Use Your Emotional Intelligence
<table>
<thead>
<tr>
<th>Emotional self-awareness</th>
<th>Self-management</th>
<th>Social awareness</th>
<th>Relationship management</th>
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<tbody>
<tr>
<td></td>
<td>Emotional self-control</td>
<td>Empathy</td>
<td>Influence</td>
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<td></td>
<td>Adaptability</td>
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<td>Coach and mentor</td>
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<td>Achievement orientation</td>
<td>Organizational awareness</td>
<td>Conflict management</td>
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<td></td>
<td>Positive outlook</td>
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<td>Teamwork</td>
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<td>Inspirational leadership</td>
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Source: More Than Sound, LLC, 2017
How Does EI Apply to Relationship Building?
Strategic Conversations
Mission
Vision
Values
Strategic Plan
What Societal Problems are You Solving?
Asking questions
Listening
Sharing your story

Listening = Learning
Strategic Questions Qualities

• Open ended during discovery
• Closed when seeking agreement
• Focused on thoughts, feelings, values, beliefs, attitudes, impact and commitment
• Some new information
• Some clarification
Listening Rule

Seek Understanding 30/70
Be Intentional
Visit Goals?
The Rights©

- Purpose
- Amount
- Solicitation team
- Time
- Participants
- Place
- Materials
Event Goals?
Donor Centric
What Does That Mean?

1. Know your donor
2. Donor as the hero
3. Language of respect
4. Seek alignment – good for the donor, good for the organization
Donor Engagement and Moments
The Tarnside Curve of Involvement

*Developed by Patrick Boggen, Tarnside Consulting, UK
Increase Motivation

Overcome Obstacles
Peaks and Endings
• “If we create the right kind of moment, relationships can change in a instant.”
• We are tying to deliver moments that are catalysts for change.
• Our job is to create strategic moments that advance the relationship and will last in the donor’s memory.
The Wow Factor
Stewardship
Start with Thank You!
Impact, Impact, Impact

- Meaningful to donor and decision-makers
- Tied to mission, vision and work
- Experiential (think “Impact Moments”), interactive, compelling
- Tiered – larger the gift, the more “high touch” and personalized
Tailored

Personal

Different Voices

Multiple Mediums

Connect the Dots
Model the Behavior You Seek
Like What?
Manage Your Time, Energy, Work
Wednesday 2 June

My secret to ice cream portion control is choosing a small bowl.

...and then I pile it as high as possible.
Clarity of Expectations is Job #1
Identify Your Buckets of Responsibility

Three to five

Order of Importance
Know Which Balls are Glass*  *Leslie Stahl
Identifying “Important” Tasks

- Contribute to the mission and vision
- Help you achieve high priority goals
- Are in keeping with shared, institutional values
- Are tied to your plan
- Have the highest return on investment
Stephen Covey’s Urgent and Important

*Seven Habits of Highly Effective People*

<table>
<thead>
<tr>
<th>Importance</th>
<th>Urgency</th>
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<tbody>
<tr>
<td>Important, but Not Urgent</td>
<td>Important and Urgent</td>
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<tr>
<td>Not Important Not Urgent</td>
<td>Urgent, but Not Important</td>
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Your Day Three Acts

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<thead>
<tr>
<th></th>
<th>Peak</th>
<th>Trough</th>
<th>Rebound</th>
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<tbody>
<tr>
<td>1</td>
<td>For most of us this period crests around 11:00 AM or noon.</td>
<td>Early to mid-afternoon</td>
<td>Late afternoon</td>
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<td></td>
<td></td>
<td>Most error prone</td>
<td>Early evening</td>
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<td>More open</td>
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<td>to new ideas</td>
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One in Five Are Night Owls

- You experience peak, trough and rebound in reverse order during the workday.
When is Your Best Critical Thinking Time?
Time Management Pitfalls

- Distractions
- Prioritization
- Accountability
- Poor Planning
- Capacity
- Bad Habits
- Frustration
Do You Have Balance In Your Life?

- Family
- Work
- Friends
- Hobbies
- Health and exercise
- Spiritual
- Community
- Learning
Pendulum*  *Constance French
Finding Solutions
Action Planning
Chose One Now, Three at the Office

<table>
<thead>
<tr>
<th>Area</th>
<th>Notes</th>
<th>Action Steps</th>
<th>Helpers</th>
<th>Due Dates</th>
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</table>
Take Charge
Commit to a Plan
Thank You!

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