

Pitch Perfect

Tips, no tricks, on how to make a corporate ask

Proposals, Communication, Evaluation & Relationships

- Who has put together a proposal? What did it look like?
- How do you communicate? Favourite method of communication?
- How do you evaluate your program? Your sponsorships?
- What's a best practice for a relationship - a corporate relationship?

Proposals, Communication, Evaluation & Relationships

■ Proposal

- two pages maximum
- one page is better

■ Communication

- clear, concise language
- keep it clear of all jargon

■ Evaluation

- know what to track before you start
- ensure you understand their definition of “success”

■ Relationship

- communicate and connect regularly
- this ensures joint responsibilities that were outlined in the proposal or agreement are met or being met
- take initiative - take the lead

Managing the Relationship

An associate uses this doctrine of 10 “Be” keys to building and maintaining a relationship.

How many do you work with...

Managing the Relationship

Work to be:

- **Patient**
- **Honest**
- **Sincere and let your commitment show**
- **Prompt**
- **Regular**
- **Interesting, involving and memorable**
- **Early**
- **Cheerful and helpful**
- **Faithful**
- **Cost-effective**

Managing the Relationship: Sponsor's Perspective

- View the relationship as **reciprocal**.
 - Both funder and recipient share a common need for success
- **Constantly** look for and share impact results.
 - Not just quantitative outcomes from program funding dollars
 - Make real links
- Seek to **leverage** initiatives together to drive program success
- Use resources to **share** successes internally with employees and externally, as appropriate

Managing the Relationship: Your Perspective

- Time
- Getting a “three footer”
- Online versus Paper versus Email
- Executive Sponsor

Managing the Relationship: Recognition & Promotion

How to share the news

■ Internally

- Your stakeholders – employees, donors and volunteers
- My stakeholders

■ Externally

- Media both earned and shared
- The web

■ Most importantly

- Work together and keep the surprises low

Managing the Relationship: Measuring Success

Within the proposal outline the **goals** to be met and understand the **sponsor's metrics**

■ Donor Reports

- Remember the dinosaurs?

■ Impact Reporting

- the number you reach
- the number of corporate volunteers engaged
- the “connecting of dots”
 - Other grassroots community groups
 - Government relations
 - Community leaders
 - Share the story of the program-building
 - Earned media
 - Think ‘long term’ and build a base line of measurement

■ The success is evaluated by measuring **all** of these **goals**

Managing the Relationship: Measuring Success

- Do your **research** and **know** what corporations are interested in funding
- Keep it **simple**
- Create a solid case statement to build **concise** presentations and proposals
- Know **who** is reading your reports
- Build **friendships**
- Recruit **corporate ambassadors** as volunteers/champions yet **never** “go around” the decision-makers.
- Don't be afraid to **brainstorm** with your corporate partner.

That's A Wrap

- Stay Connected
 - LinkedIn
 - Twitter
 - Facebook
- Just A Note

Thank you....