BEFORE THERE WAS CHANGE. THERE WAS YOU.

IT STARTS WITH YOU

Vision.
Collaboration.
Transformation.
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HORSE WHISPERING

& the gentle art of persuasive presentations.

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Personal Effectiveness Track

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Why the horse whisperer?

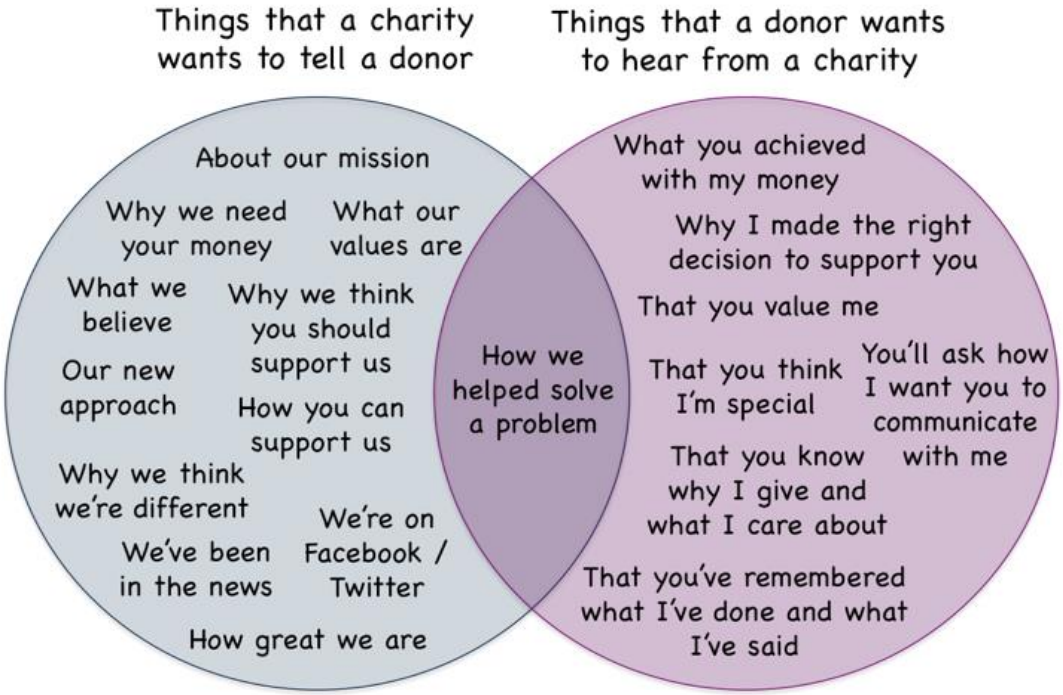
Why the horse whisperer?

horse-whisperer

Noun
(*plural* horse whisperers)

- A horse trainer who adopts a sympathetic view of the motives, needs, and desires of the horse, based on modern equine psychology.

- Not seeking to *bend them to your wi*ll, but **guide and influence** to a desired outcome
- And it's as much about what you do **outside the interaction** as during it
- There <u>is</u> a transaction involved, but seeking a **mutually beneficial** one



queerideas.co.uk

- Fundraising is based on a transaction.
- *Great* fundraising is centred on a shared mission...

as it also should be when we engage with our key partners and audiences.

The important audiences we <u>need</u>

- Different ‘power’ relationships
- Think of the power differences in the relationship between horse and trainer
- Not about exerting power, even when we can
- We seek to build good will and influence… often where the most powerful outcomes are achieved

Powerful influence from (apparent) powerlessness

The horse whisperer in action

- Build trust
- Mine for conflict
- Establish, and sustain, credibility
- Learn, then teach
- Create certainty
- Tell stories

That's what I'll do today…

- Because we're fundraisers! Story-telling is one of our key tools
- Case studies related to our key audiences
- How the above approaches were enacted and the result
- A library of analogies!

Feel free to borrow from my library!

- Pilots, planes, take-offs & cruising altitude
- Ship captains, marine pilots & charting courses
- Sportsing…
- See how many wish fulfilment archetypes you can spot!

THE PROGRAMS TEAM

& the friction malediction.

Breaking the cycle of copy comment arguments through engaging early, building agreements and making the space for conflict

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Friction in the process of getting appeals in-market

- Same issues and feedback coming up – tells us that there's an *unresolved* issue
- With deadlines imminent, stress increased and teams were becoming more focussed on what *we* need
- This friction was slowing us down – but friction is another word for *traction*, something that enables forward momentum

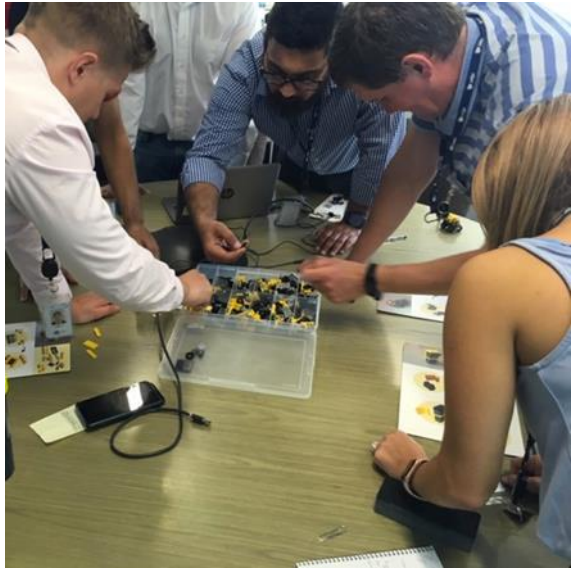
Created a forum for turning friction into traction

- Separated from the appeals process
- Asked questions – got them telling stories (and they were amazing!)
- Built agreements - early stages of a *Proposition Playbook*
- Said what we would do and did it!

Mining for conflict

A rock that turns aside the plough vs unearthing gold

Creating a workbench



Friendly ping-pong vs shoulder-to shoulder

An analogy that worked

The Maslow Ninja Star

Doing what we said we would do

Relies on saying ‘no’ to the old approach

THE CHARITY BOARD

& lessons in natural order.

Boards, like nature, abhor a vacuum… filling the (perceived) void with assurance, credibility and role clarity

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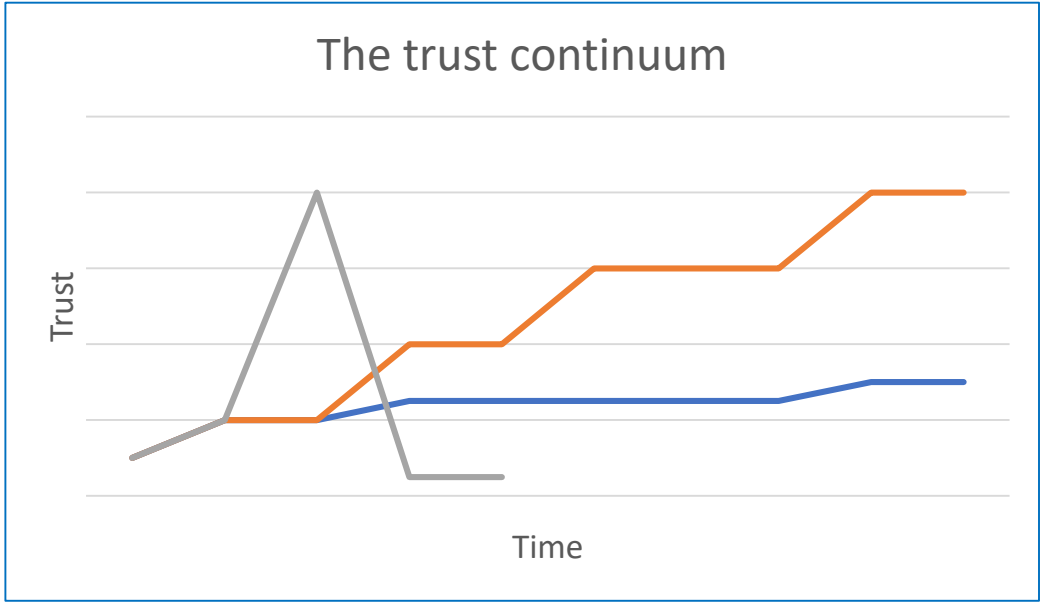
A board that was being highly directive

- ‘Here’s your budget and here’s what we want from you’
- A budget the team knew they couldn’t achieve, leading to a quarterly ‘We Told You This…’ session
- Short-term focus, no future orientation
- A program in decline

Changed the conversation

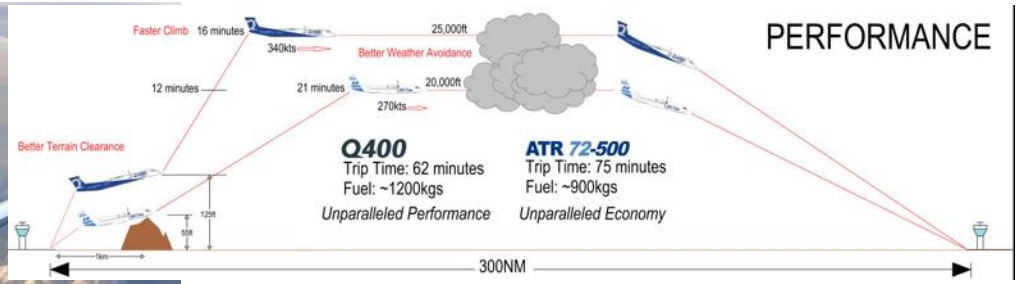
- ‘Here to fund the mission’
- Visioning in reporting – where we are now in the context of where we want to be
- Shared language – Objective, Strategies, Tactics (note plural of ‘strategy’)
- Here’s what we need from you and what you can expect from us
- Held each other to account

Building credibility & trust



Takes time, but grows best when tested

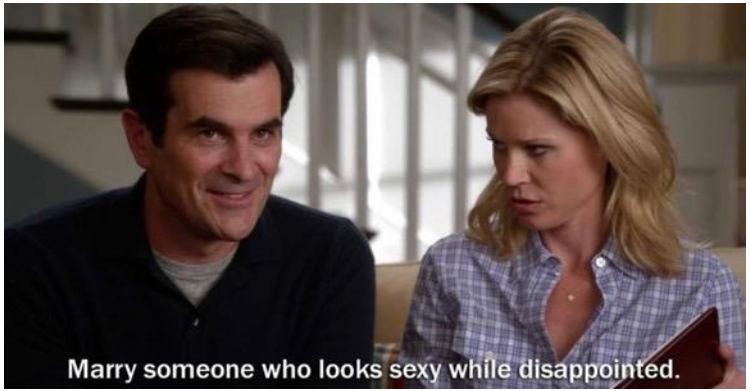
An analogy that worked



The cruising altitude we're seeking and the fuel needed

Building credibility & trust

Boss: "How good are you at PowerPoint?"
Me: " I Excel at it."
Boss: "Was that a Microsoft Office pun?"
Me: "Word."



Use the right tools and know how to use them well

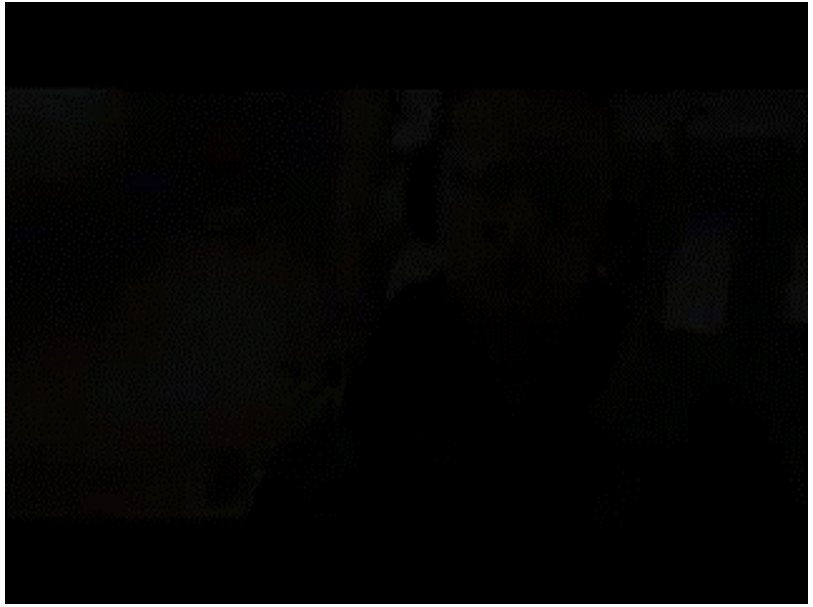
The CEO & CFO are integral in this relationship

- They tend to have more interaction with the Board
- Pretty much every Board has a Finance sub-committee but not all have a Fundraising one
- The power dynamic is clear
- They want you to succeed… so they can succeed

Became friends with benefits

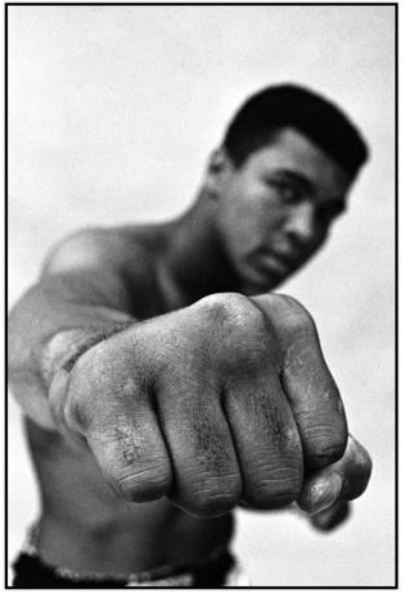
- ‘Help me understand how to…’ followed by ‘How can I help you to…’
- Knew when they were my audience and when they needed to be our advocate
- Lifted the curtain on the detail… especially for the CFO
- Strategised around Board engagement

An analogy that worked



Building planes in the sky

An analogy that worked



Core strength & extending reach

DONOR SERVICES

& the truth about cats and dogs.

We should love our donors, but not *love* our donors… working through the fears of our donors' fiercest advocates to implement new campaigns.

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Donor Services increasingly protective of donors

- Concerned about new campaigns adding to the (perceived) growing complaints
- Lack of faith, sometimes deservedly, in the tools at their disposal
- ‘They always say the same thing’ in feedback on campaigns and creative
- Outsourcing of some calling was seen as punitive and threatening

Engagement and immersion

- Moved briefings to earlier in the process and closed loop on feedback
- Results reporting modified to include their report back
- Engaged them in training and results tracking of outsource team
- Spent time in ‘their world’ doing their tasks
- Agreed when we agreed - and disagreed when we didn’t

Learning, teaching and creating certainty

I do my job and you do yours

Analogies that worked

Marine pilots and piloting new campaigns

THE FUNDRAISING DEPARTMENT

& the search for hidden treasure

Role clarity is one of the most commonly requested things in performance reviews… but what if they don't like the picture as it comes in to focus?

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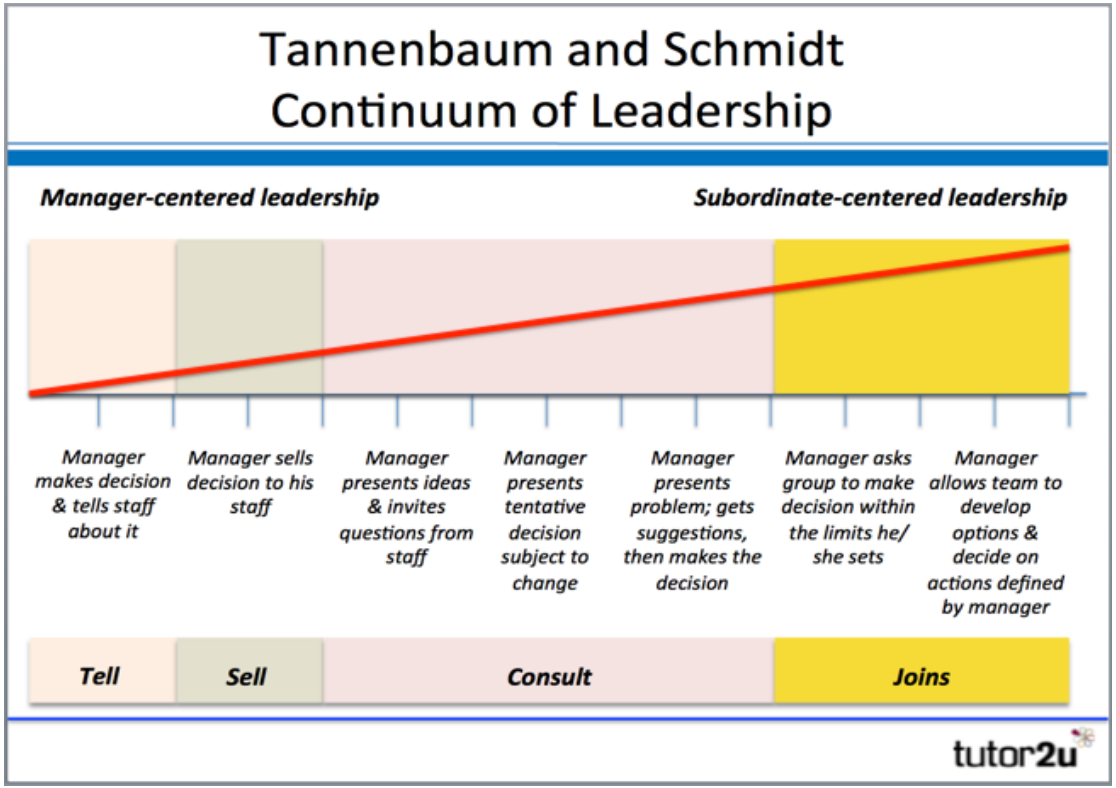
Everything's going so well, until…

- Clear vision and direction
- The support of the Board, CEO and senior leadership
- The budget to do it…
- But a team that is unsure/hesitant/resistant

Remember the Horse Whisperer

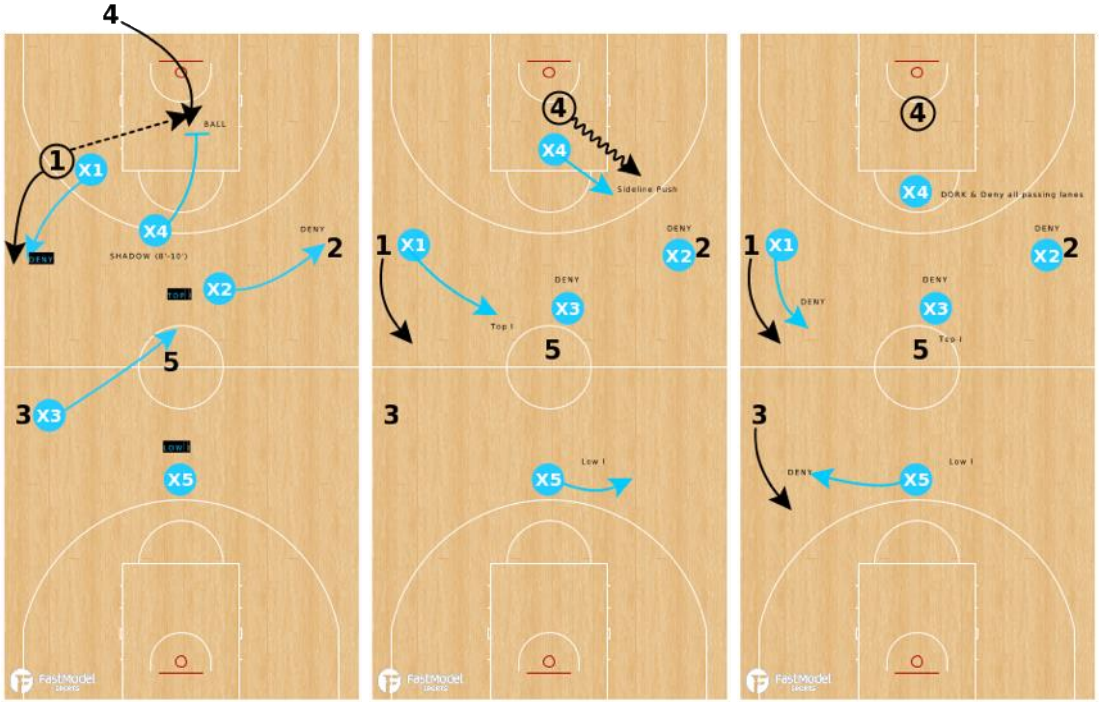
- Adopted a sympathetic posture
- Sought to understand before seeking to be understood
- Uncovered some 'treasured tasks' that were being threatened
- As well as some unwanted tasks that everyone was keen to drop!
- Built emphasis on the things we *had* to do in order to achieve the things we *wanted* to

Creating certainty



Choose well and declare it

Creating certainty



Team goals & individual roles

Analogies that worked

Charts, ocean liners & speedboats

The horse whisperer in action

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Through this we…

- Draw people in
- Create interest, then engagement
- Influence rather than bend to our will
- Cultivate an organisational culture of passion in fundraising – found to be one of the **most powerful predictors of fundraising success**

PILOT
nab
CHANGING THE WORLD IS THE ONLY FIT WORK FOR A GROWN MAN
STEVE HARRISON
BABEL FISH
THE BABEL FISH IS SMALL, YELLOW, LEECHLIKE, AND PROBABLY THE ODDEST THING IN THE UNIVERSE.
[visible happiness]

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THANK YOU.

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