



Coaching Philanthropic Advisors

AUDIENCE

Managers of development/
fundraising officers

"[This class provided] new insights into topics that I thought I knew a lot about. Very valuable ways of becoming a better coach and leader. Every section was valuable and useful — quite a feat!"

Senior Associate Vice
President of Development

"The workshop gave me new ways to think about how I can best interact with my staff ... I'm considering revisions to our pipeline meeting to make it more effective (as a result)."

Director of Planned Giving

Advantage Performance Group
700 Larkspur Landing Circle,
Ste 125 Larkspur, CA 94939
800 494 6646

Coach your fundraising team for maximum results

Program Benefits

Success as a fundraiser does not always lead to success as a manager. *Coaching Philanthropic Advisors* addresses this issue by helping fundraising professionals who have been promoted to managerial positions coach their direct reports for maximum effectiveness. This program gives managers an understanding of their new role as a coach, as well as practical coaching best practices and tools they can use to support consistent, improved fundraising results. After completing this workshop, managers will be better able to:

- Coach their direct reports to improve relationships with donors and achieve specific fundraising targets
- Apply essential tools and methods to support improved fundraising metrics
- Create and manage a consistent, high-impact donor relationship process that can effectively contribute to sustained organizational funding

Program Description

Coaching Philanthropic Advisors is a two-day program. Using an experiential, action-learning methodology with small group exercises, a coaching survey, team analysis, and a customized case study, participants develop personal insights, knowledge, and skills relevant to managing their fundraisers. During the program, managers:

- Learn the value of coaching and its role in generating results
- Understand the concept of the donor *Giving Cycle* and how to help fundraisers add value throughout the process
- Apply fundraising best practices and create strategies for coaching direct reports
- Learn a non-manipulative model for coaching interactions, and how to help direct reports leverage it by using high-impact questions
- Consider what gets in the way of effective coaching and discover creative ways to manage coaching time
- Learn a methodology for managing the prospect funnel and determine the best coaching techniques to enhance their fundraisers' pipeline management process

Throughout the program, managers consider their *Strategic Coaching Survey* results and their *Team Analysis* work along with new tools and techniques. At the program's conclusion, participants revisit challenging real-world coaching situations and complete an action plan for effectively coaching their philanthropic advisors.

Implementation/Customization

This program is typically implemented over two days and is appropriate for 12 to 24 participants per facilitator. Materials and activities are customized to your organization's critical issues, tactical and strategic goals, and objectives. A *Train the Trainer* program is also available. For best results, managers should first attend the *Becoming a Trusted Philanthropic Advisor* program.