

The Delicate Dance

"Managing" Relationship Managers without Managing Relationship Managers



Shelly Steenhorst-Baker

Senior Manager, Advancement

Perimeter Institute for Theoretical Physics

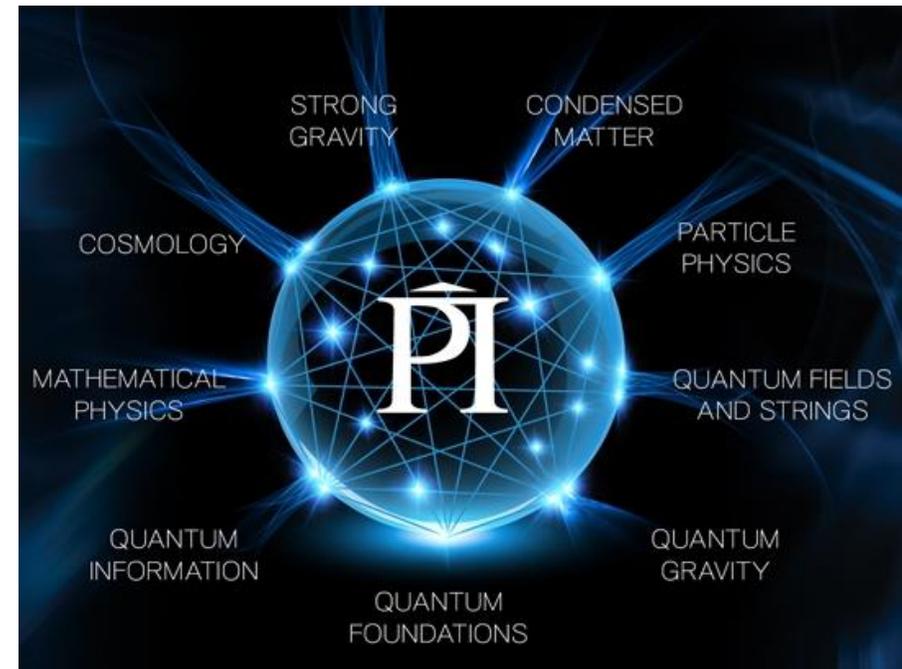
SESSION DATE: Thursday, October 13, 2016

SESSION TIME: 3:30 pm – 4:45 pm



Introduction

- About the Presenter
- Perimeter Institute for Theoretical Physics
 - Independent, leading centre for scientific research, training and educational outreach in foundational theoretical physics
 - Three pillars:
 - Research to advance our understanding of the universe (>150 researchers)
 - Train the next generation of physicists (PSI Masters training; ISSYP Summer)
 - Share the excitement and wonder of science with students, teachers and the general public (teacher resources, lectures, Slice of PI)





Today

- Advanced discussion about fundraiser metrics and how to use prospect management, reports and collaborative techniques to contribute towards your fundraiser's success and measure how successful fundraising efforts are.
 - **Please sit in groups of 4 to facilitate discussion.**
 - **Please avoid sitting with your team.**
- Fundraiser metrics
 - What should be public (vs. private to the fundraiser and their manager)
 - How to have difficult conversations with fundraisers and fundraising managers about performance issues.
- How, why and when (but not what) to report fundraising success
 - Not about samples (though happy to share offline)

Discussion

What has been your most challenging fundraiser metrics issue?



To get you thinking, issues usually fall under **People**: reporting relationships (managing up), building buy in, training, collaboration; **or**

Tools: visibility, reporting and tracking, CRM or other technical challenges

- Take **20 minutes** in a group of four (**5 minutes each**) to outline your challenge and how (or whether) you were able to solve it
- Choose one and a presenter to share with the group



Lessons I've learned

Be your Fundraiser's Ally

Inform, don't judge

It looks like your contacts are down this month. Have you had a chance to get everything into the system? Is there anything I (or my team or X) can do to help you reflect your activity? [if the numbers are real] Have you thought about your strategy to increase numbers next month? Can I help you build that?

Never have a conversation with their manager without talking to them first

I know [your manager] is going to see that these numbers are low when I submit my report. Is there anything you want me to share when I do so?



Lessons I've learned

People **MUST** trust the numbers

The first one to be blamed will always be your report.

Keep clear backup (for example, most CRM systems are live and change daily. Don't just pull the roll up numbers unless you can show what was actually in the system at that point (such as via an audit trail).

Training has to be clear, available and constantly followed up on.

If someone hasn't completed contact report training, their numbers will be off. Note it each time you send them (and their manager) their report and re-iterate your offer to train.



Lessons I've learned

↑ Seniority = ↑ Simplicity

The more senior the person is, the more you need to simplify your message.

Focus on the why.

Be consistent.

Repeat yourself often. Once is never enough.



Lessons I've learned

Learn about how to manage people

The same rules for having difficult conversations with staff who report to you apply:

- Be clear about the issue
- Know your objective
- Adopt a mindset of inquiry
- Manage the emotions
- Be comfortable with silence
- Be consistent across fundraisers



Lessons I've learned

Transparency feeds growth

Any organization using metrics needs to look at transparency – who will be able to see what when. We live now in an era where people expect unprecedented amounts of data to inform decision-making.

My default position is always to have metrics data be public. This comes with the caveat that you explain to staff at all levels (whether fundraisers, managers, or other levels) that metrics can only ever capture one part of the story. Judging performance (which is only the job of the manager) requires the full story, and that can only be fully measured between a staff member and their manager (illness, non-metric responsibilities, position differences, experience level and time in role will all impact metrics).



Lessons I've learned

A report a month keeps the questions away

If you can have on demand reports, that is fantastic, but even if you do (and especially if you don't), you need to send a regular reminder to the fundraiser and their manager about performance. I have found the most useful frequency for that report to be monthly. Quarterly reports do not happen often enough to catch budding issues, and leave people feeling ambushed when the quarterly report is delivered. More often than monthly feels like pestering and there is not enough change to warrant taking up people's time.



Thank you!

Questions? Comments?

Thank you for letting me take up some of your day.

I always welcome conversations with my colleagues, you can contact me at:

shelly.steenhorstbaker@gmail.com