



## Moves & Management

### December 2011

#### NEW PODCAST

**Ever wondered what Bob Osborne Sr. sounds like? Here's your chance...**

Karen, Laura, Neesha and Bob, Sr. gathered together around the microphone and put on our "Donor Hats" to talk about the best stewardship we've ever received... *(Yes. We have donor hats. They're fetching and keep the rain off.)*

#### Interesting tidbit?

For two of us, our best stewardship was tied to something we **DID**, not something we gave (though both are generous donors to the place where we received the Best Stewardship)... Hummm. A lesson in there? You bet.

#### ***Year End Reflections from The Osborne Group, Inc.***

Sounds like we should be sitting by a roaring fire, sipping tea or brandy (or tea with brandy...) and intoning... *"Back in my day... ah, yes it is the year that was... Harumph, harumph..."*

#### **What good are "reflections" if you can't act on them?**

So call these the **REFLECTIONS AND REACTIONS of The Osborne Group team...**

Below you'll find thoughts on:

- Getting stuff done - timely in the next two weeks, eh?
- Tapping into your donors minds, rather than focusing only on "close, close, close" (or tapping in so you CAN close, close, close)
- Your complete social media New Year's Resolutions - handy pre-numbered list for you!
- ... as if that wasn't enough: access to a brand new podcast on "The Best Stewardship We've Ever Received"

#### **Advice from a Joyful Donor**

*by Karen Osborne*

From Thanksgiving to New Year's Day, I think about **giving** more than I think about **fundraising**. *It wasn't always like this.* The last month of the calendar was always a pressured time to close, *close, close*. And I know that is true for the vast majority of you. But as a donor, I'm thinking about giving - which organizations are on the list; do they still belong there; should we adjust; what impact do we want to make; how much can we give; how much should we give?

Many of your donors are having the same conversations, worries, pleasures as they weigh their year-end giving. What did you do this year to make sure you're on their list? What did you do to demonstrate that the extraordinary impact they made by investing in you? How do you show them that you

To listen in: [click here](#). Then scroll down to the **Information You Can Use**.



## SOCIAL MEDIA TO CLOSE MAJOR GIFTS?

*Not quite... but it's a powerful engagement tool when used wisely.*

Figuring out **how** is the "Brave New World" of relationship-based fund development.

### We're here to help!

Consider an audit of your social media strategy that begins with looking at how it fits into your overall development plan.

Let us help you create the right strategy for you or teach you to engage in that process yourself via our workshops or webinars.

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and ask to speak with

remember who they are and that you care about them as people?

- Did you pick up the phone on the day they made their last gift and say thank you?
- Did you ask who else should you thank and then do it? Write a personal note?
- Did you share impact in tangible, personal and satisfying ways well after the gift? Was it clear that was what you were doing or did you just send a newsletter and hope they got the message?
- When was the last time you called or visited?
- Did you engage them in your mission, vision and work in ways they found personally inspiring?

### We all talk about being donor-centric.

From my perspective as a donor, it's pretty simple. Know me, care about me, thank me, and share the impact of my gift by connecting me to the people, planet and animals you serve. Be sure to enroll and engage me in your organization.

*You'll definitely make my list and probably with a nice upgrade.*

## Before the Ball Drops... Resolutions for Social Media Strategy by Neesha Rahim

It's almost time to ring in the New Year and I've been working diligently on my "before the ball drops" to-do list. (Thank you iPhone app that allows me to indulge in my list making psychosis and even to categorize my lists!!)

This list has nothing to do with holiday prep; instead I use it to evaluate decisions I've made over the year. I take a long hard look at my big, lofty goals - I also LOVE big, lofty goals! - and then force myself to write out concrete, small steps I can take to either reinforce what I've been successful with or correct mistakes I've made in trying to achieve those goals. Looking at it on New Years Day, with some check marks, and a clear (bite-sized!) path forward, makes me extremely happy. Honestly, for me, it puts the "happy" in "Happy New Year".

In hopes of helping you evaluate your social media work and set you on a course to creating your own bite-sized to-do items for the rest of this year and next year, here's the start of a "before the ball drops" list for you. I hope it helps to put a little happy in your New Year and conveys my heart wishes for your success.

We "do-gooders" have gulped down a fair amount of the social media "Kool-Aid" in hopes of raising money to support the work we love and/or increase awareness about the change we hope to inspire in the world. That's a wonderful, worthy and also "big, lofty goal". But is it the right tool for you?

1. Set aside any thought of which tools you use (FaceBook, Twitter,

Neesha.

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- Identify ways to diversify your funding streams and build an implementation plan
- Build strong Board leadership to help steer your organization through rocky times

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LinkedIn, etc.) and focus on the goal. Answer the question, "what do I/we want to achieve this year?" You might have multiple goals: raise \$x... Advocate for\_\_\_\_\_, Increase brand awareness by x%..., etc.

2. Prioritize goals. Check in with stakeholders to be sure those priorities match theirs.
3. Allocate the time per week you are willing and able to devote to each of those priorities.
4. Put your target audience first. Define the groups you have to reach to achieve those goals you set in step 1.
5. Take stock. What tools do you currently use to work towards achieving those goals? Direct mail, newsletters, in person meetings, events, etc should be included with FaceBook, Twitter, LinkedIn, etc.
6. Don't make the mistake of getting sucked into the social media vacuum. Social media is a tool. It's not the goal. Evaluate your tools one by one.
7. ***Is each tool the right one to reach your target audience?*** I just advised a client to STOP using FaceBook to reach young professionals and take a harder look at LinkedIn....
8. Dissect how you gather content and choose what to communicate. When it comes to social media in particular, are you creating more noise (as Seth Godin puts it [here](#)) and stress for you and others in creating/gathering content or are you adding real value for your constituents?
9. Determine what kind of value added might lead to realizing those goals you set in step 1.
10. Expect double and triple duty of each of your tools. For example, the process of creating your newsletter or direct mail piece should generate content for FaceBook and Twitter.

Know when to step away. Have a happy holiday and come back fresh. Now look at your social media plan given all of the above, make a plan that includes allowing stakeholders (volunteers, donors and staff) to answer all the questions you did. Bring them into the process and build a 2012 plan together.

### Getting Stuff Done... and still have a life!

We all struggle with this every day. There is too much to do and too little time to do it. Here are some tips for getting stuff done that works 80% of the time. The other 20%?... don't ask!

1. Accept the fact that you can work 24 hours a day, 7 days a week and never, ever be finished. There will never be a moment when you are sitting at your spotless desk, bored, with everything finished, no new deadlines, all is well. In fact, the more successful you are the more (not less) work you will get. **You have to embrace this.** Otherwise, you keep making to-do lists that don't get completed or you keep working into the night and on weekends and you still have more to do. Yikes!
2. Once you accept item one, this next step is easier (not easy but

easier). DECIDE WHAT YOU ARE **NOT** GOING TO DO. Learn how to say "No." With a never-ending to do list, what doesn't get done is whatever was at the bottom of the list. Usually, it are those things Stephen Covey named "Important but Not Urgent". We also end up doing too many "Urgent but Not Important" Items. You know what they are... tons of emails, tasks you enjoy more than the important things looming. When you make a strategic decision about what won't get done - those things that are NOT REALLY IMPORTANT, we suddenly have more time to do the things in the IMPORTANT category.

3. Plan for the unexpected. Everyday something will come along that ruins your plans for what you were going to do. Every day. But we're surprised. We lament. Right? Instead, know that the unexpected is going to come along. Build it into you schedule. If, by some miracle nothing unexpected happens, you have a gift of time to use wisely. Nice, right?
4. List the big buckets of responsibility assigned to you. Not the to-do list - your top job priorities. Then indicate how much time you believe you should spend on each. Check it out with your supervisor and come to agreement. Then track how much time you actually spend - Reality, baby. Come up with some strategies for re-alignment and then discuss with your boss. Negotiate. Agree. This should probably be number one!
5. Life balance matters. What motivates you matters. Career development matters. Take a hard look at yourself. Do you have balance? What is getting in the way? Does your supervisor know what motivates you? Have you told her? Are you making time to read, attend a conference, develop professional relationships, be a mentor and find a mentor? I know these things are hard to fit in, but count them among your Important but Not Urgent stuff; build them into the big buckets of responsibility. Include them in your plan.

Let us know how you get things done and still have a life.... Post your ideas on our Facebook page!

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