



360° Decision Making

**How to sell a major project to the board...
or your sponsors**

Selling: the art of helping those who want to buy

....Learn how to guide your staff to evaluate major projects that indicate significant risk / reward to your organization and how to logically assess outcomes from a financial, objective, and subjective perspective (there's that 360 degrees) using a common set of processes.

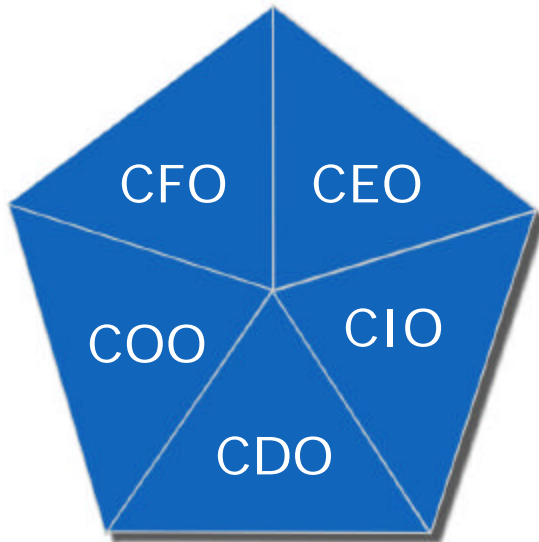
- 1. How many of you have a good idea and don't know how to effectively present it to the board?*
- 2. How many of you think you have all the facts in your board presentation only to leave the board meeting feeling unprepared?*
- 3. How many of you have been asked to put together a proposal to assure the best price for the board, and want to be certain you present a clear, concise definition of the project?*
- 4. How many have been asked for a 'budget estimate' for a new project, but are wrestling with how to quantify the costs?*

Take Away Objectives

- Find the right information

- Find the right solution

- Justify why it is the right decision



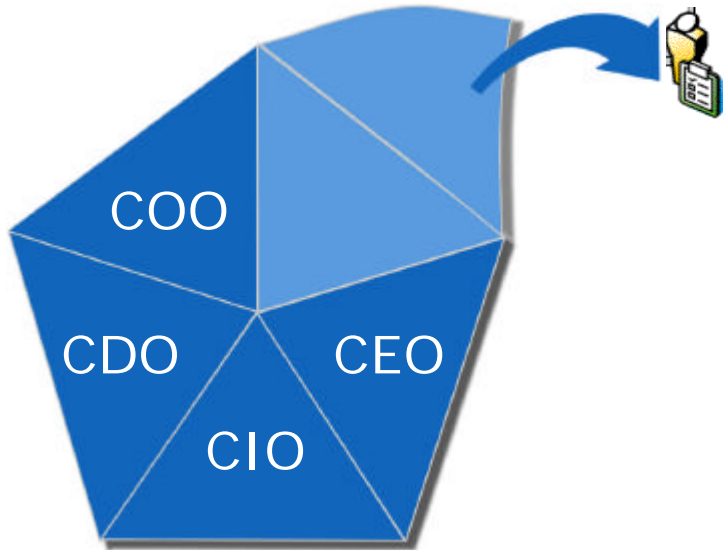
CEO:

Typical Mindset:

Positive Growth

Typical area of focus:

- **Constituents**
- **Strategy**
- **Growth**
- **Organizational Identity**
- **Positive Top and Bottom line revenue**



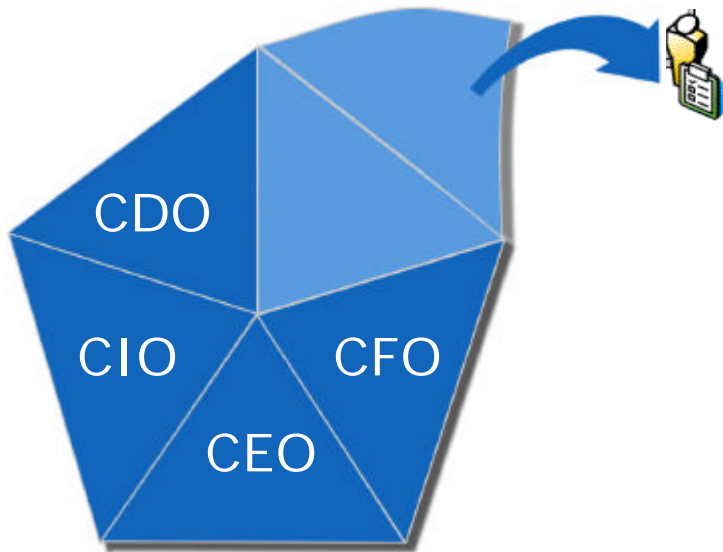
CFO:

Typical Mindset: _____

Cost vs. Benefit Analysis

Typical area of focus: _____

- **Cash Flow Management**
- **Revenue**
- **Return on Investment**
- **Positive Top and Bottom line Revenue**



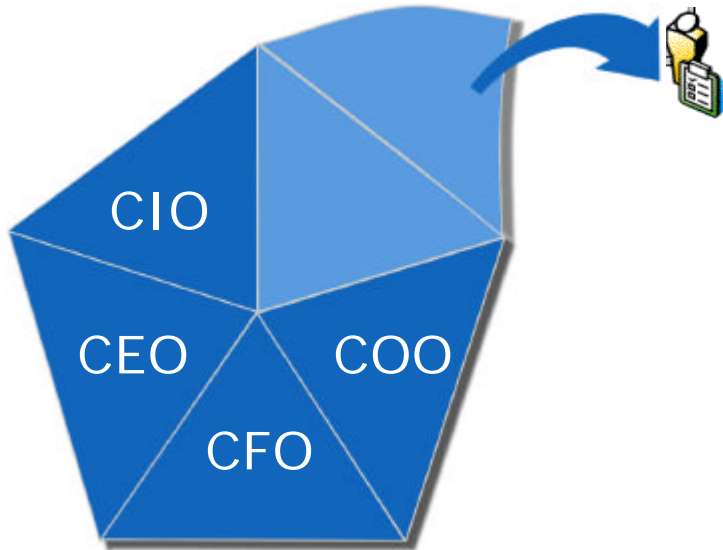
COO:

Typical Mindset:

Business Continuity

Typical area of focus:

- **Productivity**
- **Operations**
- **Integration**
- **Continuity**
- **Training**



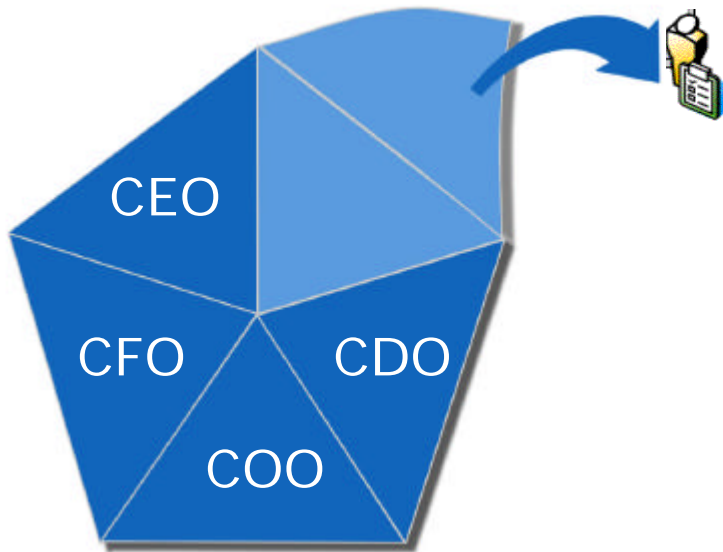
CDO/CMO:

Typical Mindset: _____

Lifetime value of a constituent

Typical area of focus: _____

- **Constituents**
- **Revenue**
- **Constituent Responsiveness**
- **Organizational Identity**
- **Analytics / Market Trends**



CIO:

Typical Mindset:

Systems Support

Typical area of focus:

- Reliability
- Productivity
- Automation
- Security
- Standards



POV Pain Chain™

Title: CEO
Pain: Unable to invest in growth
Reason: Eroding Profits
Reason: Aging Donor Base

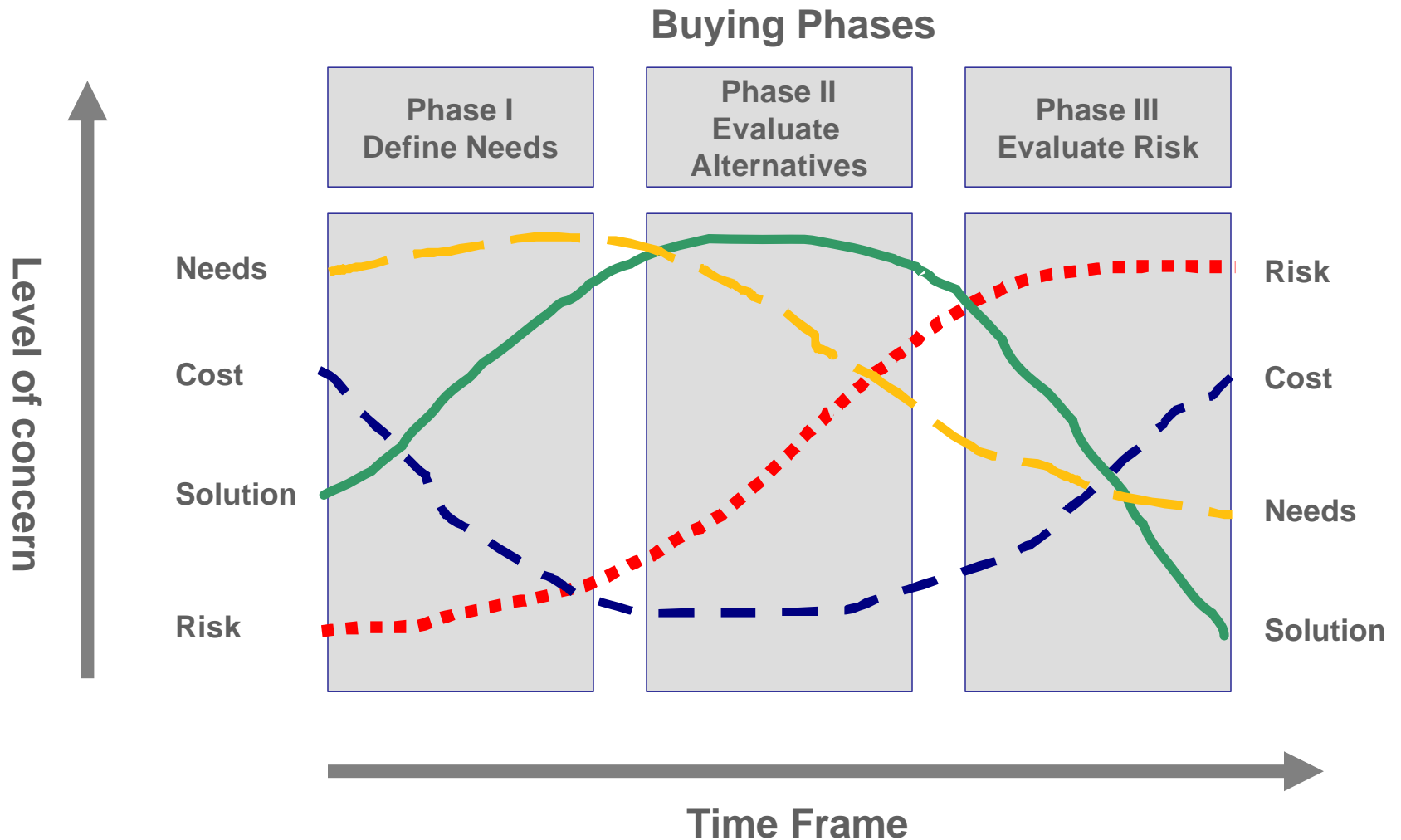
Title: CFO
Pain: Eroding Profits
Reason: Increasing Costs
Reason: Donor file erosion

Title: CDO
Pain: Increased Costs
Reason: High manual
Intervention for personalized
donor communication

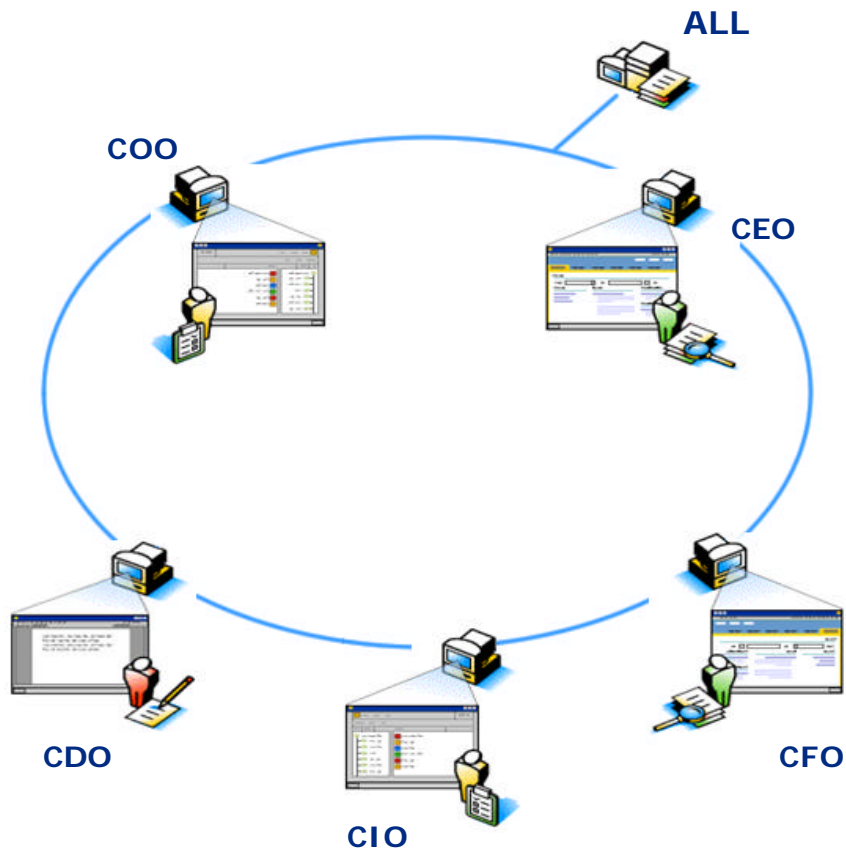
*Interaction costs represent 40-60%
of staff time.*

- McKinsey & Company

Title: CIO
Pain: High manual intervention for
personalized donor communication
Reason: Unable to automate using
existing technologies



Process – Leads to Predictable Results



Objective

- POV Decision Criteria: Problem / Need
- POV Requirements and Weightings
- Feature Ratings and Scorings
- Vendor Scorings
- RFP Development & GAP Analysis
- RFP Response

Subjective

- References
- Demonstrations
- Cultural Fit with Vendor
- Vendor Stability
- Delivery Options

Financial

- Financial Implementation / Support
- Financial Options
- Return on Investment



Case Study #1 - Problem

Situation

\$130M Media Ministry

Multi-channel communications

Call Center Replacement

Need for cost effective new names

Problem

Web / Phone / Mail not integrated

Disjointed communication with donors

Delayed Premiums and Revenue

Poor use of high touch opportunity

GOAL

Increase personal touch

Increase donor satisfaction

Move to paperless environment

Cost effective new name generation



POV Pain Chain[™]

Title: Executive Vice President

Pain: Declining revenues

Reason: Poor performing telethons

Title: VP, Telephone Ministries

Pain: Poor performing telethons

Reason: Every call must wait for agent,
some calls dropped

Reason: No real time access to history

Title: VP of Technology

Pain: Every call must wait for agent,
some calls dropped

Pain: No real time access to history

Reason: Out-dated call center solution

Reason: Not integrated with CRM



Case Study #1 - Solution

Solution

Computer – Telephony Integration: CTI
CTI blended with CRM and Web

Traditional paperless call center features
Mixed inbound / outbound on the fly

Benefit Expectation

50% increase in productivity
20% increase in calls handled
150,000 new names a year

19,000 new donors annually
Real time premium turn around
Faster revenue recognition
ROI in two Telethons



Case Study #2 - Problem

Situation

\$40M Missionary Organization

High human capital use: volunteer/paid

CRM Replacement

Need foundation for growth

Problem

Web / Phone / Mail not integrated

Donor/Volunteer Miscommunications

Blunt instrument for fine tuned fundraising

Legacy system near the end of useful life

GOAL

Increase personal touch

Increase volunteer satisfaction

Speed recruitment / Time to field

Increase revenue and size of donor file



POV Pain Chain™

Title: President

Pain: Under performing revenue goals

Reason: Unable to achieve growth targets

Reason: Not attracting new donors

Title: CDO

Pain: Unable to achieve growth targets

Pain: Not attracting new donors

Reason: Unable to effectively track donors and market to donors

Title: CIO

Pain: Unable to effectively track donors and market to donors

Reason: Needs a CRM system vs. an accounting system



Case Study #2 - Solution

Solution

Package CRM platform implementation
CRM integration for a volunteer portal

Digital document mgmt vs. paper
Cost effective growth platform

Benefit Expectation

20% increase in productivity
2-5% increase in revenue

8-1 support to field vs. 10-1 support to field
Real Time information access for field
ROI in 12 months



Case Study #3 - Problem

Situation

\$30M For-Profit Corporation

Recruitment and retention of talent

Call Center Replacement

Change cost structure to gain efficiencies

Problem

Competitive environment for phone agents

80% turn over in 6 months of phone staff

Paper environment – 30% actual time of phone

Poor use of individuals staff talents

GOAL

Increase Employee Retention

Increase Employee Productivity

Increase Employee Efficiency

Better operating visibility and analysis

Better operational scalability



POV Pain Chain™

Title: President
Pain: Cost to Revenue ratio is too close
Reason: Unable to increase sales
Revenue without increasing staff

Title: VP of Sales
Pain: Unable to increase sales
Revenue without increasing staff
Reason: No automation allowing scale

Title: CIO
Pain: No automation
Reason: What systems are available
Reason: Using Late 80s technology



Case Study #3 - Solution

Solution

Computer – Telephony Integration: CTI
Blended CTI IP network for voice and data

Traditional paperless call center features
Mixed inbound / outbound on the fly

Benefit Expectation

25% increase in revenue
20% increase in calls made
8% decrease in monthly ops costs

Detailed analytics about operations
Detailed analytics about customers
Real time management reporting
ROI in 15 months



Questions

Contact Information

Question and Answer -

15 minutes

Additional information Today -

White paper handouts

Copies of the presentation -

www.Compass.net

Contact the speaker -

John Soose

Director, Technology Management

John.soose@compass.net

757-226-3189