SURVIVING
to
THRIVING

an executive's guide

Tell your story.
Compel them to give.

Non-Profit Edition

For Roshei Yeshivas/Deans, Executive Vice Presidents,
Executive Directors, and Directors of Development

Contents

Communication

Communication is transferring a piece of information from Location A to Location B. This is a critical aspect of living life to its fullest. In relationships, be it with a spouse, parent, or child, communication allows you to explain what you are experiencing, feeling, and thinking. Communication is the tool with which you can express your needs and wants. Ultimately, it is through communication that we connect with one another and establish deeper relationships.[1]

This is a fundamental truth in our daily life. Communication is the link, and this unquestionable reality will never change. It will always retain the same importance in our relationships, as well as in our workplaces. Communication bears the same magnitude and role in the office as it does in the home.

Just as communication connects mother to son, sister to brother, daughter to father — it also connects subordinate to superior, colleague to colleague, employee to boss, donor to fundraiser.

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1 Better Health Channel. (n.d.) Relationships and Communication. Retrieved from: https://www.betterhealth.vic.gov.au/health/healthyliving/relationships-and-communication

The significance of communication with our family and friends is so apparent, and should be just as obvious in the workplace. Just as communication has a clear position in our daily lives, it must have a labeled seat in the offices of corporate America.

Communication is ultimately divided into three elements. It's important to understand what defines clear communication in order to be successful at it.

What is intended to be said.

This is what person A has in mind to communicate: What they intend to express and most likely genuinely believe they are saying.

What is actually said.

Even if person A wanted to say X, he may have said X slightly differently, communicating something else with his tone, body language or words themselves. Therefore, what is said is very often different than what was intended to be said.

What is interpreted.

Person B now hears what person A expressed. His interpretation can be totally different than what was actually said, and even more different than what was intended to be said.

Communication is a three-part process. Realizing this will help preempt confusion. All three components are often drastically different, when really they are meant to be the same.

Knowing and understanding these three components can lead to effective and successful communication.

It is essential for your professional team to be aware of not only the significance of communication, but of this common obstacle. Your organization, and ultimately your profits, will prosper only when your team is educated and ready to battle the inevitable miscommunication.

Staff Development

We're all familiar with an adage, "an ounce of prevention is worth a pound of cure". This is the fundamental principle of training. It solves issues before they arise, puts out fires before they begin. It is worthwhile to train staff for this reason alone.

In addition, training improves your employees' overall value and maintains the organization's goals and high standards. It disseminates information for employees to understand general and specific organization-wide goals. It is only with training that we can expect employees to improve their performance, and to ultimately reach that next level. Training consistently has also been proven to increase profits, and educate employees on generic processes that must be updated or altered. It also informs the team of any drastic changes or new implementations. Training is crucial. Why? Because knowledge is power and implemented knowledge is invincible.

Is Your Team Playing in Harmony?

As Chet Holmes, author of the Ultimate Sales Machine states, "with training everyone sings in harmony. What kind of music is your organization creating?" (pg 24).

This can be assessed by answering the following questions:

1. Do all your employees perform each aspect of their job with a high degree of excellence and consistency?

2. Are the results to Question #1 consistent?

3. Does each supervisor give a similar answer to each question or problem?

4. Does each employee give a similar answer to each question or problem?

5. Is the client treatment similar, no matter who the client deals with in your organization or department?

6. Do all staff members know what is considered good performance and/or attitude?

Now bring it down to your organization. What's a realistic training plan for a yeshiva or an organization? The ideal is great to have — it allows us to see the ultimate goal. But let's bring it down to our level.

What is the ultimate and realistic training plan for an organization?

Let's opt to say that an organization should aim to have a smooth, distinct training process when a new member joins, almost like a smoothly compartmentalized conveyor belt for all incoming team members.

How Do We Get there

This is divided into two sections:

1. All normal process charts and technicalities which would pertain to all employees. For example:

   - How to properly schedule a meeting with an organization?

   - What is the log in information for daily computers and software needed to use within your organization?

   - What are the processes for putting in requests?

   - How to use a phone?

   - How to send emails, updating the subject line to reflect the specific

message, especially when the conversation threads become long.

2. Role specific knowledge that would pertain to your sales or customer service team. We've all experienced calling a company and being told one thing by a specific representative, only to follow up later and to be told something entirely different by another representative.

This division allows every incoming member to learn everything they need to know and not waste time on anything that doesn't apply to them. Ideally the training is presented in a clear and visual manner that can easily be referenced later on for clarity.

It is also important that the task of writing the training plan, as well as the actual training, is assigned to someone who understands the nuances within the organization and is a good teacher. Although a small detail, this is important because it is the final step in ensuring the process is properly implemented and successful.

Financial Management

Financial management refers to organization, planning, and controlling the financial activities in each establishment. It entails applying general management principles to the financial resources and procedures in an organization.

The main objective of financial management is the allocation and control of the organization's finances, ensuring the optimal utilization of funds.

This department has the critical position of knowing the inflow and outflow of all organization finances. This includes client payments, employee payroll, overhead expenses, potential investments, and everything in between.[2]

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2 MSG. (n.d.) Financial Management – Meaning, Objectives and Functions. Retrieved from: https://www.management-studyguide.com/financial-management.htm

Who and What

A Chief Financial Officer often spearheads the financial department in a organization, consisting of bookkeepers, accountants, and lower-level financial managers. Some companies choose to outsource some or all of their financial management. The main point and crux of a organization is the finances. Without this, there is nothing.

Bottom Line

Business is about profit. Yes, some of us are passionate about what we do. But that isn't the point of corporate America. Corporate America is all about making money! It's about supply and demand, filling the need and making the highest profit... finding your place in the market and creating a path for your financial success. Business is about money. If you want to say there are other components, that's fine. But that's not the point. The point is being profitable, because without that, a organization cannot stay in business. With this truth in mind, it is apparent that financial management must take the front seat for the business to be operational.

Treating this aspect of business in a lax manner can result in a shortage of funds, as well as unclear allocation of capital, loss of staff, and ultimately bankruptcy.

3 Tips on Financial Management

Have a plan. Have a *detailed* plan.

This is basic. We must have a financial plan. On a personal level this is beneficial. On a professional level, this is mandatory. However, there is one crucial thing to keep in mind: do not have a plan that consists of three generic bullet points. You need a detailed plan! One that can be a map if you will, guiding you through all the overlapping steps. This plan could (and really should) outline every step, the subcategories, and the proactive to-do's under each. It is through this detailed plan that you will not only be prepared for what comes your way, rather you will already anticipate what is coming.

Be a realistic idealist.

It is only those who dream big that ever achieve, and those who believe they will be the ones to change the world that really do. Dreaming big, setting goals, being a visionary – they pay off. But they pay off only if one is realistic while dreaming. It is not a contradiction to know your current position while setting a standard goal.

However, be realistic regarding your current financial stance. You can simultaneously know your place and set a goal. It is then your responsibility to create and implement an attainable plan.

Numbers don't lie.

Your financial management department has charts and lists and probably some color coding. They keep records of where the money went and the outcomes it had. These documents are categorized and saved. And saved some more. For that one time that you need to see their records, you need previous encounters and data to know what to do for the future. When this happens, listen to the charts, listen to the data. The numbers don't lie! Ignoring this information that you so cautiously and meticulously saved is not only a waste, but will set you up for failure. Do yourself a favor and watch the numbers.

Delegation

Wearing different "hats" is a phrase that often gets passed around with a positive connotation. Yes, in our organization, we're team players, we all do everything, we all wear different hats. Yes, there are benefits, and reasons to applaud this. Flexibility, teamwork, ambition. However, how ideal and efficient is a business with this mindset?

Defining roles and responsibilities can be challenging. It is often much more convenient to allow or even encourage your team to wear a managerial hat for the first hour and a sales hat the next. But employees wearing different hats and assuming different roles has not proven to be the most effective strategy in a traditional business setting.[3]

3   Blazek, K. (2016, August 25). The Importance of Defining Roles and Responsibilities. Retrieved from: https://www.trus-core.com/resources/the-importance-of-defining-roles-and-responsibilities/

Benefits of Having Distinct Roles

When formal roles are assigned, everyone knows what is expected of them. Everyone has their tasks and their agenda, and knows it is their responsibility to complete them. They know their goals and they are familiar with how to attain them. It is only because of this that all the work can even get done. The roles are clearly delineated, thus allowing for nothing to fall between the cracks.

When roles are clearly defined, people work better together. It is clear who is the superior and who is the subordinate. It is understood that this person will be present at this meeting on any given topic. Individuals then accept their positions and stop openly or subconsciously jockeying for power.

There is less overlap, and therefore less energy is wasted. There is no conversation of who is doing what task.

The importance and benefits of set roles and responsibilities have been clearly described.

How do you inform and enforce set roles and delegation in your team?

Inform.

Inform them of the benefits listed above. Verbally communicate your employee's role. Give your team members a written document with their roles and responsibilities (if necessary one can request a signature stating their understanding and acceptance of this role).

Having a follow up conversation ensuring their understanding can be helpful. This allows them to raise any concerns or questions.

Marketing

Corporate storytelling has been defined as "presenting your brand identity and values to a wider public with the help of narrative techniques."[4] The strategy and purpose of the organization is communicated via a storyline. It's communicating through imagination, almost luring a prospect to learn more about the organization.

We all grew up on stories. We grew up on the story of the prince and the princess, the turtle and the hare, and the three little pigs. These stories resonated with us. They found a place in our hearts and left an impression. Maybe even a long-lasting one.

Stories have this power. This is no different in the world of marketing.

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4 Amartielli, A. (n.d.). What is Corporate Storytelling? Retrieved from: https://alessandramartelli.com/en/freebies/corporate-storytelling/

Corporate storytelling is all encompassing. It incorporates every key component you possibly need in your marketing plan. This includes the technical details such as color scheme, integrated deliverables, logo, and how your ad looks. Your elevator pitch stems from your corporate narrative. Who you target is linked to your corporate story. You are your story. Take advantage of your story.

This is accomplished through education based marketing.

Value of Educational Marketing

"You will attract way more buyers if you are offering to teach them something of value to them than you will ever attract by simply trying to sell them your product or service...Sales is all about building rapport, not breaking it. When people feel they're being 'sold,' they automatically resist you. When people are being educated, they have no resistance." —Chet Holmes, Author, The Ultimate Sales Machine

When you provide valuable business content, you're building rapport with your prospect — it does not come across as 'salesy.'

Benefits of Education-Based Marketing (EBM):

1. Builds credibility

2. Establishes you as an expert in your industry

3. Positions you as a thought leader

4. Creates brand loyalty (retention)

Naturally, the information that you share will also highlight the value of your service or product. However, when it's "packaged" through education-based marketing, you build credibility in the eyes of your prospect.

Instead of a pitch, you are using education-based marketing. This becomes the subconscious of your identity. It is the underlying thread.

Your corporate story then becomes more than colors and even identity. You then become the go-to organization in your industry. Why? Because you know what you are doing. You are identified as an informative source, not an arrogant salesman. Your potential prospect's guard is then let down. It is with this tactic of education that you reel in new clients. The knowledge is the bait; the client is the big fish.

The Dynamic Duo

Pairing your corporate storytelling with education-based marketing is the ultimate dynamic duo. It identifies who you are, and what you offer. It portrays you to the world in the ideal way. It gives you the respect or response that you feel you deserve. This banner of identity, projected through education and informative marketing strategies, allows your prospects to feel like they are in a museum as opposed to a car dealership — getting educated, not tricked. The decision is in their hands. The informed decision to become a client becomes an exciting journey. Who you are is clear. Why you are valuable is conveyed. The decision is easy to make. Prospective clients agree as well.

Fundraising

You might think that fundraising is about getting your donors to give. Well, if you do, you already missed the mark. Fundraising is not about getting your donors to give. It's about connecting them to a cause that they're passionate about, and inspiring them to make a difference in the lives of others and the world we live in.

We're Hard-Wired to Care

Scientists have gathered a number of generous people and put them under an MRI. What did they find? When we give to others, the joy centers of our brains light up, oxytocin is increased, and we want to give further — because we experienced meaning, we feel joy. When we understand that philanthropy is about creating joy, generosity and willingness to make the lives of others better, we can approach fundraising or more accurately, philanthropy, differently.[5]

5 Hodge, J. (2016, Sep 1). Philanthropy: A Whole Lot of Shift Needs to Happen. Tedx Talks [Video file]. Retrieved from https://www.youtube.com/watch?v=ObvKlsZMuCQ (17:07)

Partnering to Write Their Moral Biography

Most organizations and their donors, view a donation as a transaction. A shift of money from the wealthy individual's pocket and into the organization's. If we had to visualize this, we would see two people facing each other with a dollar sign in the middle. This is seemingly how philanthropy and donations are viewed as a whole. A mere request for some money which will, by the way, go to good. This approach to philanthropy is completely incorrect. We need not face the donors, but rather realign them next to us. As if, shoulder to shoulder, looking upon the same vision.

Listen a lot. Talk a little.

When meeting with a donor, don't begin by talking about your organization, when it was founded, the staff that you have, the clients you service and how much they should give. Instead, begin by asking the giver, what are they passionate about? What mark do they want to leave on the world? And listen.

Once you understand what drives the giver, what they're passionate about, and what kind of kind of mark they want to make on our world, show them how you can help them accomplish their mission, by partnering with you.

Connect Them to Your Cause

"80% of fundraising is educating your donor base." —Rabbi Richard Bieler, Noted Fundraising Consultant, Yeshiva University and Ohel Children's Home and Family Services

How?

Through effective story telling. Tell the giver about the people you service and how your giving changes their lives daily. Visually reinforce your story with pictures and brochures that convey the impact you make. The more professional the material looks, the more credible your story will be, because people make decisions based on emotion.

"Marketing is the key to communicating the needs of an organization. Unfortunately, many organizations don't understand the need for marketing. When they are finally convinced and follow through on a plan, they aren't patient enough to see it through." —Rabbi Simcha Scholar, Founder and Executive Vice President of Chai Lifeline

Create a corporate identity.

Your brand identity communicates who you are, and must do so without confusion. If you see your organization as an individual with a face, that face needs to look the same, for the world to recognize you. You might be wearing a different outfit or glasses, but people still recognize you, because the basic elements of your facial features and personality are consistent. That's what they look for. That's how your organization needs to present itself with its business cards, letterheads, envelopes, email signatures and anything else that your donors, staff and members interact with.

Strategize.

Implement a strategy of where you'll advertise and how often. This will be guided by your budgetary needs.

Track.

Set up a tracking system to determine what is working or not, so that you can pivot as the campaign is rolling out, making adjustments as necessary.

Educate.

Your educational content is marketing. Make sure your staff and fundraising team are well aware of any educational content that has been put out and can speak to it — if asked by donors, parents and others.

When presenting your educational materials that speak of your organization's story, ensure that it has a consistent look and feel, using the same logo, colors, and fonts across your brochures, newsletters, posters, business cards. Seeing a visually cohesive piece after piece will subconsciously convey a message of unity to the giver, and demonstrate to them the impact they can have.

Update.

We're hard-wired for caring and sharing, not accumulating and defending. Donors stop giving because they don't see the impact their giving makes, not because they stop caring. A well crafted email marketing message, sent out consistently —either weekly or monthly — can demonstrate to your donors the impact they've made. Highlight a student or staff member whose life their giving improved. Create short video clips and testimonials and include them in your emails. We all know a picture is worth one thousand words. Use that to your advantage.

Corporate Culture

The term "corporate culture" was coined in the 1980s. Until then, different concepts resembled the idea of corporate culture. They infiltrated universities, businesses, and clubs across America beginning in the 1960s. But it was only 20 years later that corporate culture became a staple concept in every major business. Why? Because its positive impact in business efficiency, attitude, and overall success became profound. Its effect in terms of escalating revenue proved successful, and was therefore implemented.

What Is It

Folks often believe that corporate culture is the occasional streamers in the conference room, office-designed water bottles and individualized ID cards. Not true. Corporate culture is an elaborate, thought-out atmosphere purposefully spread across the organization. Usually a top-trickle-down method is implemented from the leading management. Of course, the culture is also affected by the individuals working in the corporation.

What Does It Accomplish

Corporate culture is the core. It is the string attaching the newcomer intern to the CFO. It is a unifying aura. It is internally what the organization is: their values and ideals, not only what they are but also what they realistically aim to be. It leads to further direction, a sense of belonging, and a feeling of care and appreciation.

While this might seem like a nice environment to work in, an old-school CEO may say: Well, work isn't about fun. Work is about work. Being productive. And being profitable.

He has a point. However, when properly implemented, corporate culture, spikes activity, growth and helps generate revenue. By enabling the employees to live and breathe the organization's mission, corporate culture encourages scaling. When employees feel connected, they work to their maximum, ultimately causing increased organization growth in profits. Corporate culture is in the old-school CEO's best interest. Really, it's in everyone's best interest.

Starbucks

Starbucks depicts the power and effect of corporate culture perfectly. In 2007, Starbucks ran into an issue; they were under-performing. They were simply not producing and growing as well as they had been previously. This can be blamed on the lack of change in foods and beverages, the recession, and higher pricing. Ultimately, Starbucks had to close approximately 600 stores.[6]

Howard Schulz stepped back in to see if he could once again lead the organization to a better, more profitable stance. Schultz could have looked at the surface, the artifacts. But he knew the solution was hidden in the core of the organization. The issue lay in the organization's assumptions – the Starbucks corporate culture. If it was the issue, it was definitely the solution.

Howard Schultz felt the core issue was the employees' lack of understanding of the Starbucks mission statement, which was reflected in their behavior. This confusion of the fundamental culture caused the employees to under-perform, which led to a great loss in sales. Realizing the main missing piece was the misunderstood organizational culture, Schultz set out to resolve this issue.

6 Linn, A. (2008). Starbucks to close 600 stores in the U.S. Retrieved From: http://www.nbcnews.com/id/25482250/ns/business-us_business/t/starbucks-close-stores-us/#.XJw1KndFw2w

To address this concern, Schultz reestablished the culture essentials by taking 10,000 store managers to New Orleans. There they did some community service leading up to a conference. In this retreat they focused on two main points:

1. Stressing what is at stake and each manager's responsibility in Starbucks' success.

2. Reinstating and reiterating Starbucks' culture — the fundamental key which led to the business's success, that Starbucks is a warm, welcoming, respectful place — where serving coffee is secondary. In this conference, the leaders transmitted the Starbucks culture and tradition, to the store managers, who then passed it on to their employees. Thus, 10,000 Starbucks stores would be re-infused with the true Starbucks aura.[7]

This scenario portrays how Howard Schultz saw the problem at it's core, by digging deeper into the essence of the issue. Mainly, that it was the lack of value, expression of integrity, care and respect. This was transferred and restored from the higher executives, to the store managers, and to the employees. The problem was solved at the core, fixing assumptions, enabling the organization to thrive.

And What About You?

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7 Ignatius, A. (n.d.). Howard Schultz of Starbucks' Turnaround. Retrieved From: https://hbr.org/2010/06/howard-schultz-on-starbucks-tu

BLMG

Telling
your story.

www.**brand**story2020.com