

# SO, YOU WANT TO BE A CAPITAL CAMPAIGN CONSULTANT?

Amy Eisenstein and Andrea Kihlstedt



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# So, You Want to be a Campaign Consultant?



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## Why Campaign Consulting?



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## 3 Truths of Successful Campaign Consultants

1. Design Campaigns so They Cannot Fail
2. Leverage Outsider Role to Gain Authority
3. Run Your Business to Succeed in Business




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**Poll: How many campaigns have you experienced (as a consultant or staff member)?**

- A. None
- B. Part of one (came in the middle or left before the end)
- C. One or two campaigns
- D. Three or more from start to finish



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**Truth #1**

**Design Campaigns So They Cannot Fail**



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## How to Design a No-Fail Campaign

### What is a "Working Goal"?

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## How to Design a No-Fail Campaign

### Build Check Points into Campaign Process

1. After Feasibility Study
2. After Quiet Phase


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# How to Design a No-Fail Campaign

## Two Critical Campaign Tools

- Gift Range Chart
- Depth Chart


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## Gift Range Chart Sample

\$2,500,000 Working Goal

NUMBER OF GIFTS	\$ AMOUNT OF EACH GIFT	\$ AMOUNT FROM LEVEL	CUMULATIVE AMOUNT	% OF TOTAL	PROSPECT MULTIPLIER	PROSPECTS NEEDED
1	\$500,000	\$500,000	\$500,000	20%	X2	2
2	250,000	500,000	1,000,000	40%	X2	4
4	100,000	400,000	1,400,000	56%	X3	12
8	50,000	400,000	1,800,000	72%	X3	24
10	25,000	250,000	2,050,000	82%	X3	30
15	10,000	150,000	2,200,000	88%	X3	45
20	5,000	100,000	2,300,000	92%	X3	60
30	2,500	75,000	2,375,000	95%	X4	120
many	<2,500	125,000	2,500,000	100%	many	many

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## Gift Range Chart Sample

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many	<2,500	125,000	2,500,000	100%	many	many

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## Depth Chart

GIFT LEVEL 1	GIFT LEVEL 2	GIFT LEVEL 3	GIFT LEVEL 4	GIFT LEVEL 5
# Gifts # Prospects Needed	# Gifts # Prospects Needed	# Gifts # Prospects Needed	# Gifts # Prospects Needed	# Gifts # Prospects Needed

## Depth Chart



GIFT LEVEL 1	GIFT LEVEL 2	GIFT LEVEL 3	GIFT LEVEL 4	GIFT LEVEL 5
# Gifts # Prospects Needed	# Gifts # Prospects Needed	# Gifts # Prospects Needed	# Gifts # Prospects Needed	# Gifts # Prospects Needed
3 6				



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## Depth Chart

GIFT LEVEL 1	GIFT LEVEL 2	GIFT LEVEL 3	GIFT LEVEL 4	GIFT LEVEL 5
3 # Gifts	# Gifts	# Gifts	# Gifts	# Gifts
6 # Prospects Needed	# Prospects Needed	# Prospects Needed	# Prospects Needed	# Prospects Needed
Sue Jones				
Mary Smith				
Joe Jackson				

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### Depth Chart

GIFT LEVEL 1	GIFT LEVEL 2	GIFT LEVEL 3	GIFT LEVEL 4	GIFT LEVEL 5
<b>3</b> # Gifts <b>6</b> # Prospects Needed	# Gifts # Prospects Needed	# Gifts # Prospects Needed	# Gifts # Prospects Needed	# Gifts # Prospects Needed
Sue Jones				
Mary Smith				
Joe Jackson				
Mike Weinberg				
Talisha Brown				
Mohammed Sami				

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**Step-by-Step Checklist to  
Planning a Capital Campaign**

**CapitalCampaignToolkit.com**




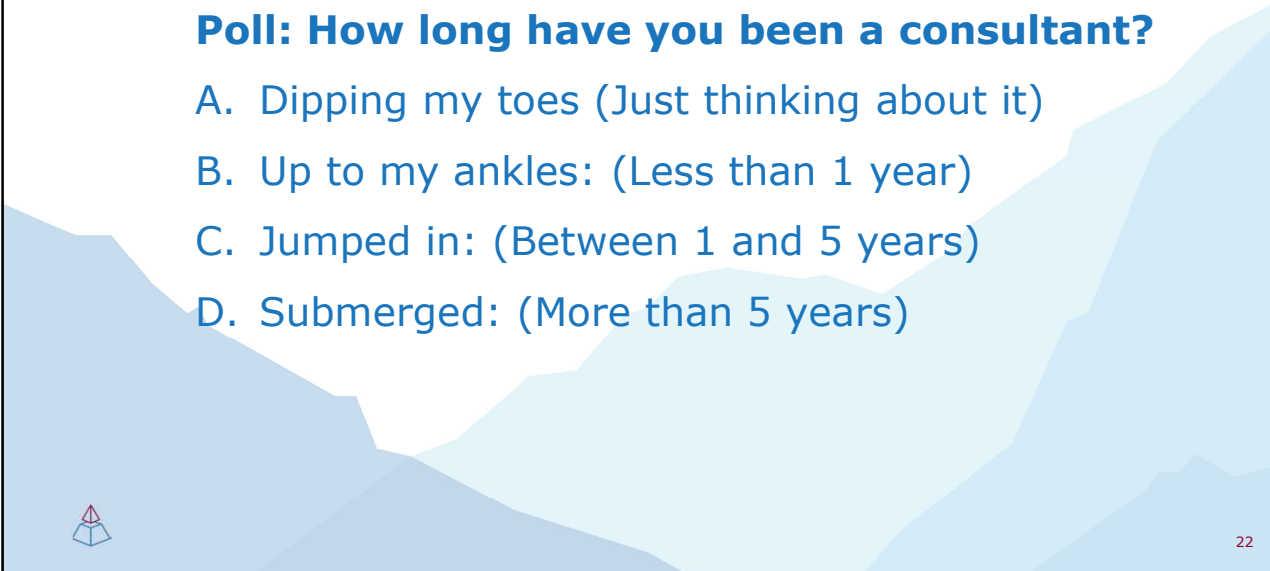
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**Poll: How long have you been a consultant?**

- A. Dipping my toes (Just thinking about it)
- B. Up to my ankles: (Less than 1 year)
- C. Jumped in: (Between 1 and 5 years)
- D. Submerged: (More than 5 years)



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## Truth #2

### Leverage Outsider Role to Gain Authority




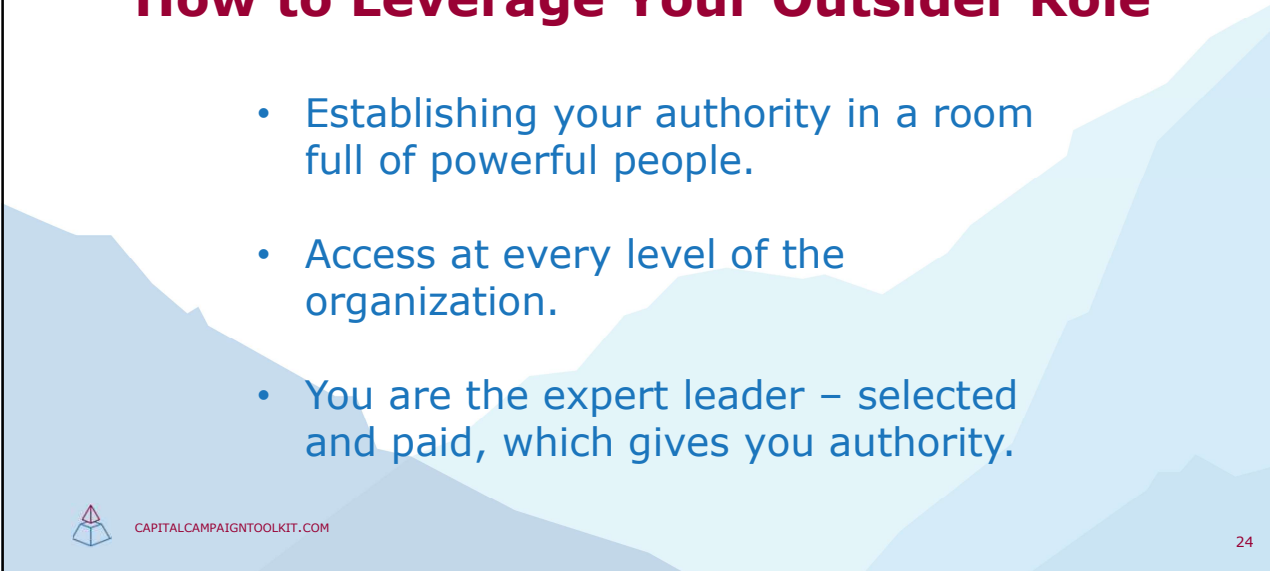
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## How to Leverage Your Outsider Role

- Establishing your authority in a room full of powerful people.
- Access at every level of the organization.
- You are the expert leader – selected and paid, which gives you authority.



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## How to Leverage Your Outsider Role

### Solicitation Training

Exercise: How High Will You Go?



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## How to Leverage Your Outsider Role

### As an outsider, you:

- Conduct meetings
- Train board and staff members
- Provide expertise and structure
- Have access everywhere



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**Truth #3**

**Run Your Business  
to Succeed in Business**



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**Run Your Business to Succeed in Business**

**Marketing, Branding,  
Finding Clients**



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**Run Your Business to Succeed in Business**

**Choose Your Clients Carefully**

**Don't Take On Unsuccessful Clients**



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**Run Your Business to Succeed in Business**

**Proposals,  
Pricing, and Contracts**

Always Under-Promise, Over-Deliver



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## Run Your Business to Succeed in Business

### Testimonials and Referrals



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**THANK YOU!**

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