

BUILDING THE CASE FOR ADVANCEMENT

To prepare for making your case, use the worksheet below to organize your talking points. Identify the issue or possible objection, the evidence you have or need to support your position, identify related details and why the evidence is important to making your case.

EXAMPLE:

Issue: Relationship Management

Evidence: There is a significant loss of productivity when a relationship manager leaves or changes.

Specifics: It takes, on average, 18 months for a new relationship manager to reestablish trust upon acquiring a new portfolio with little to no new gifts in that time.

Relevance: Furloughs lead to turnover, turnover leads to lost relationships with donors. That loss leads to frustration that can decrease gifts from even our best donors.

Issue: _____

Evidence: _____

Specifics: _____

Relevance: _____

Issue: _____

Evidence: _____

Specifics: _____

Relevance: _____

Issue: _____

Evidence: _____

Specifics: _____

Relevance: _____

Issue: _____

Evidence: _____

Specifics: _____

Relevance: _____
