

The essential leadership tool to engage and empower your teams

FUNDRAISING HOW TO TRACK

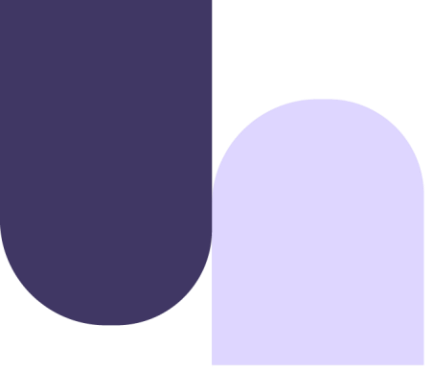
Fi Riley, Director & Consultant

AskRIGHT



Fundraising How To Track
Sponsored By:



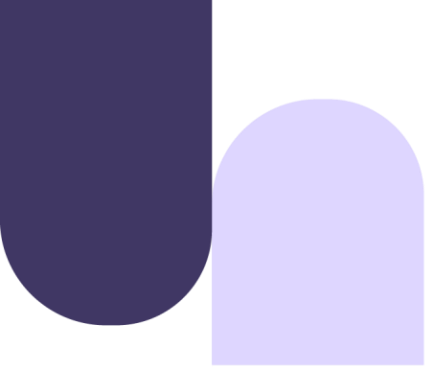


I acknowledge the Traditional Custodians of the land on which the Brisbane Convention & Exhibition Centre now stands. I pay respects to Elders past and present, and recognise their enduring contribution to the culture and spirit of the land.



FIA

CONFERENCE

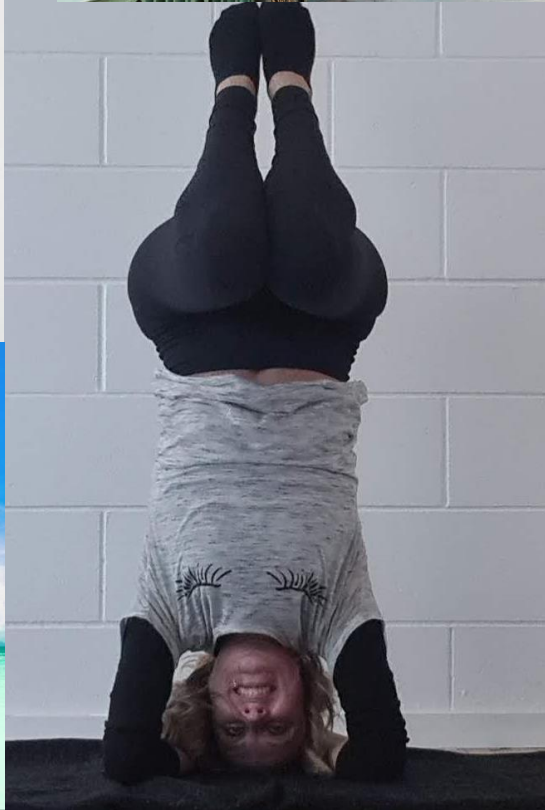
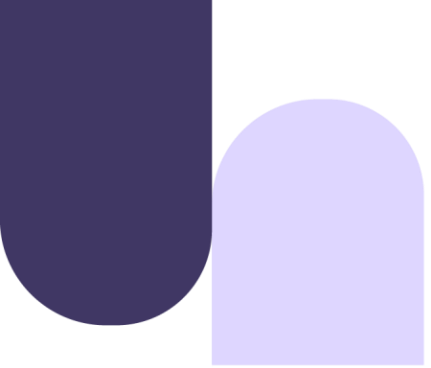


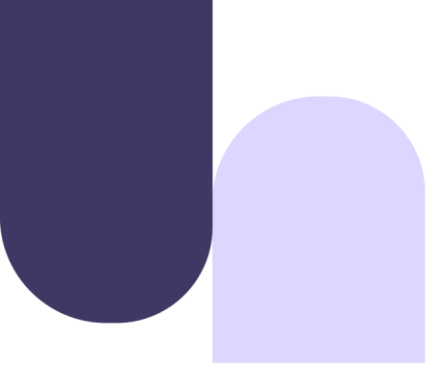
What do gin, traffic lights, whiteboards, Japanese manufacturing and thermometers have to do with leading effective teams?

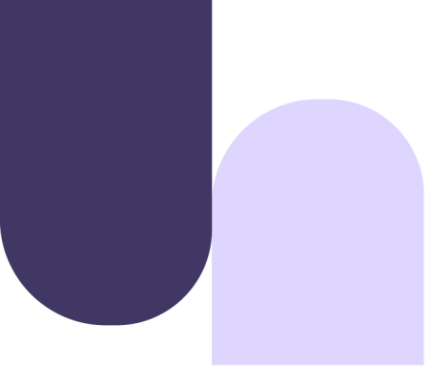


FIA

CONFERENCE







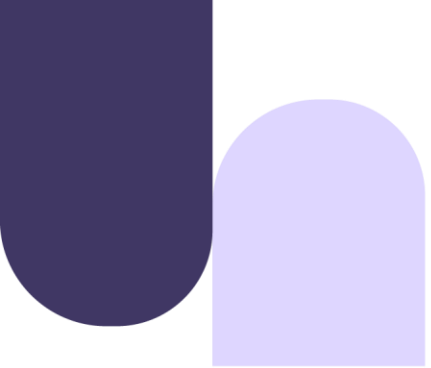
“When we don’t bring our whole selves to work we suffer — lack of engagement, lack of productivity, and our well-being is diminished.”

~Mike Robbins



FIA

CONFERENCE



ENFJ

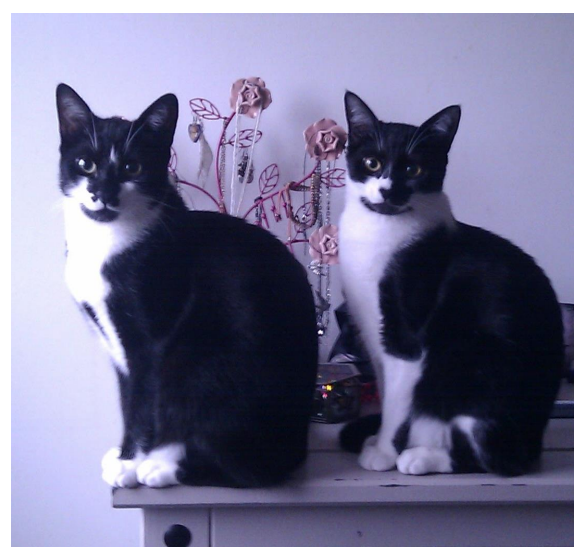
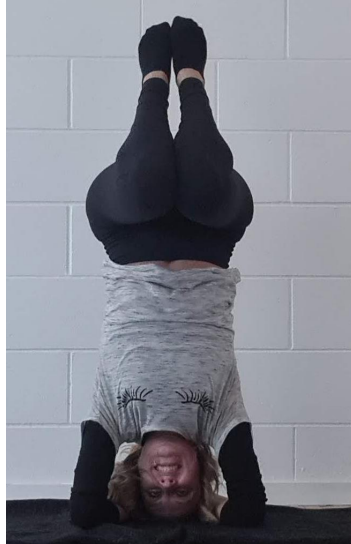


Extrovert iNtuitive Feeling Judging

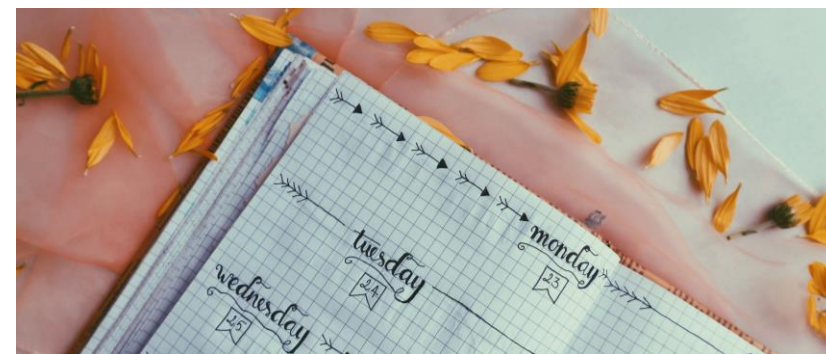


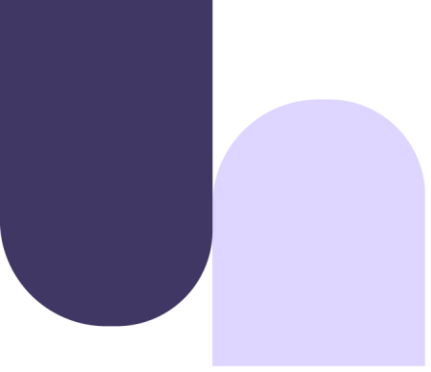
FIA

CONFERENCE



Extrovert iNtuitive Feeling Judging





**‘Think of your life as a house. Can you knock down the walls
between the rooms and be the same person in each of them?’
Harvard Business Review**

FIA

CONFERENCE

HBR, Discovering your authentic leadership by Bill George, Peter Sims, Andrew N McLean and Diana Mayer



Bringing your whole self to work is intended to be inclusive and accepting, not to create channels for oversharing!



FIA

CONFERENCE



The solution?

A visual management system

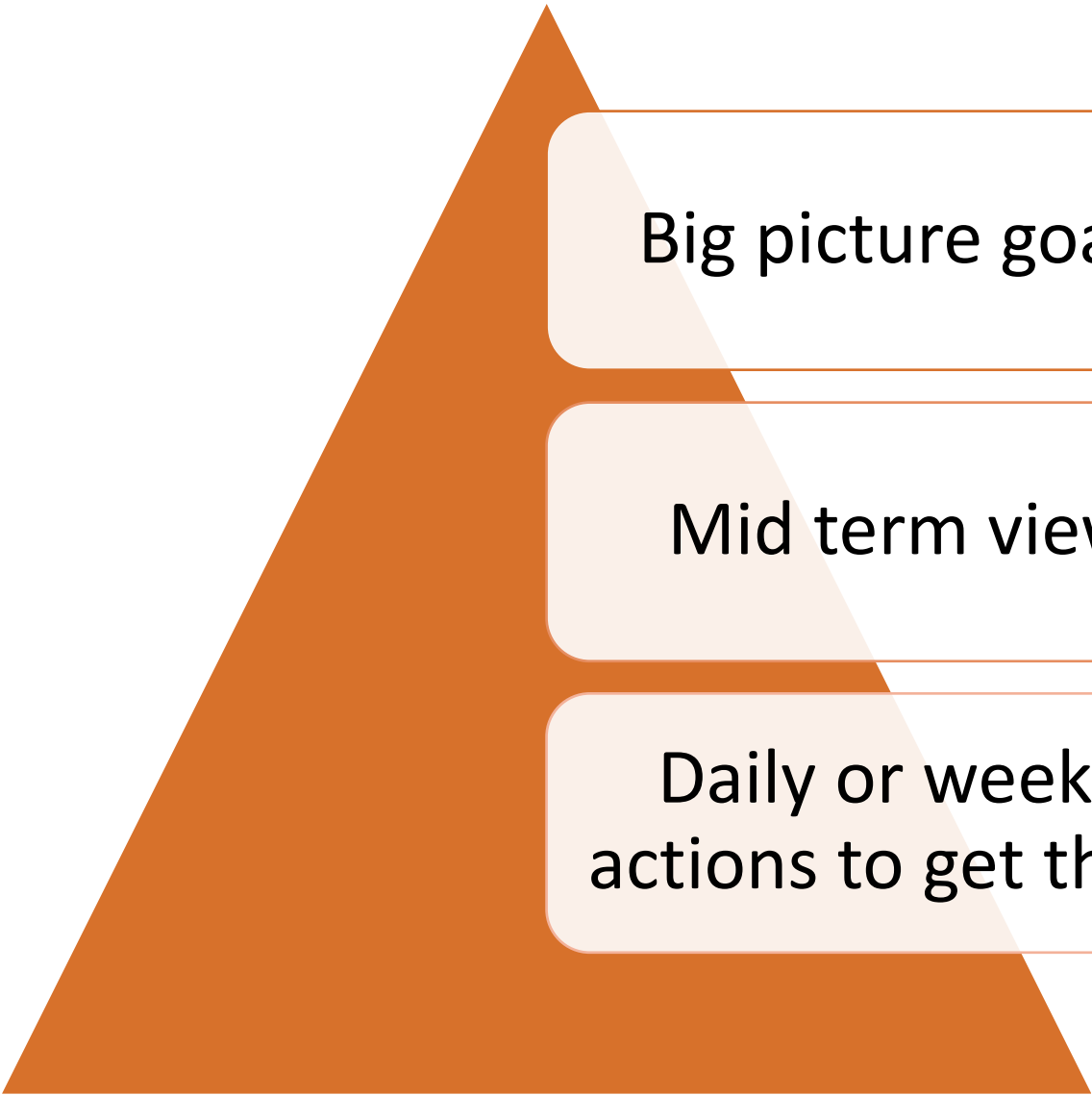
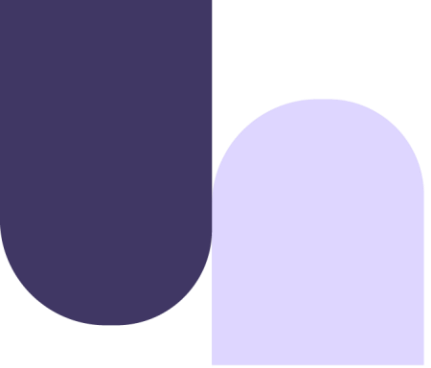
FIA

CONFERENCE



Visual Management Systems

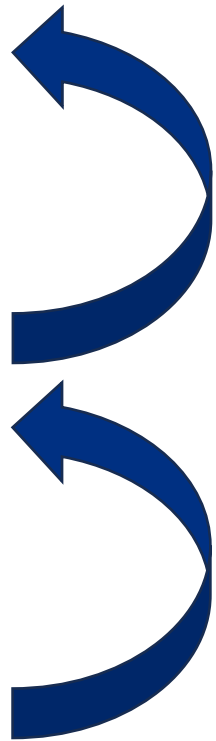
- ✓ Using techniques from Japanese manufacturing we embed a culture of continuous improvement in teams
- ✓ Keeps an eye on the big picture whilst looking at the daily and weekly actions that are needed to reach those goals
- ✓ Grades key areas with traffic light RAG status (red, amber, green) to use a visual system to see if teams are on track for success
- ✓ Can be fun and customised to allow team personalities to shine
- ✓ Works on and offline if you need to flex it for remote team members



Big picture goals

Mid term view

Daily or weekly actions to get there





The Benefits of a Visual Management System



FIA

CONFERENCE



The Benefits of a Visual Management System

- ✓ Allows your teams to bring their personalities into play
- ✓ Sees employees as the whole person and connects back to the work
- ✓ Tracks core team goals ensuring everyone is on the same page
- ✓ Empowers teams to see how their weekly priorities add up to the bigger picture
- ✓ Lets you quickly identify issues and course correct
- ✓ Holds you and your team to collaborative account
- ✓ Creates a weekly stand-up meeting to connect as a team*



FIA

CONFERENCE

*as a minimum! With one team we were doing daily huddles



The Main Components of a Visual Management System

- ✓ Team check in — energy, capacity
- ✓ Priorities for the week
- ✓ Mid-term view
- ✓ Goal check
- ✓ Captures issues
- ✓ Share movements
- ✓ Tracks results
- ✓ Celebrates success



... but don't be afraid to make it your own

- ✓ Sharing interesting things from the sector
- ✓ Wally of the week or Star of the week
- ✓ Learnings or development



Let's build our board!



Team check in — energy and capacity

- ✓ I would generally start with this to open the huddle
- ✓ Keep team members on track using traffic lights system to help quantify energy and capacity
- ✓ It's important to create space for team members to be honest so you can know if there's anything in their week that could be impacted by their energy or if their workload looks unachievable
- ✓ It also allows for team members to offer support to their peers if they have capacity
- ✓ Try using symbols for team members to represent themselves so what they share is just in-between the team, and not visible to wider staff

Team check — allow your team personalities to shine

Gin bottles



Disney character



Animals

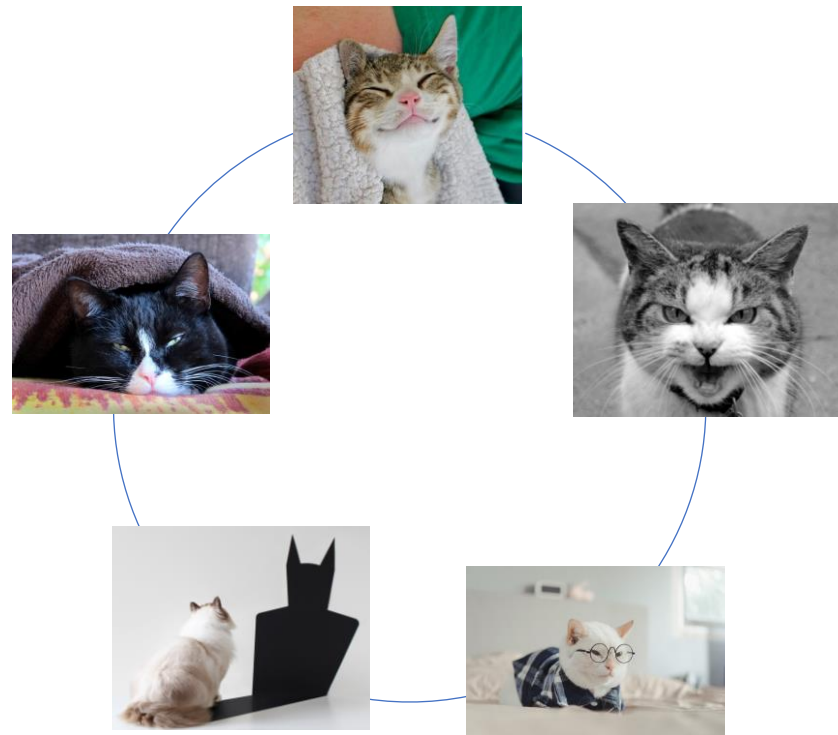


Choccies



Team check

Energy cat scale





Goals

- ✓ Make sure your team strategic goals are on the board and you refer back to them regularly, to keep the team focused.
- ✓ This can be done by simply having them somewhere visual, with one board we had our BHAGs (big hairy audacious goals) in each corner.
- ✓ My favourite way to refer back to goals is to set them as swim lanes against which teams write their weekly priorities. This helps see how their actions ladder up to the goals



Priorities

- ✓ Ask your team to prepare their top three priorities to bring to the huddle
- ✓ Before removing last week's priorities check they were actioned and if not, check for any issues. These can be added to the issue log.
- ✓ Try playing with sharing priorities in swim lanes against goals. This helps see how their actions ladder up to the goals



Mid-term view

- ✓ Checking this allows you to keep an eye on activities for the year and any potential road bumps to delivery. I would advise a rolling 6-month view.
- ✓ It's important to rate activities in terms of likelihood of delivery on time according to the plan, using a RAG status (Red, amber, green)
- ✓ This check is about being accountable, raising challenges, ensuring focus on delivery and course correcting if necessary. It also ensures the team are focused on the plan for the year.



Issues log

- ✓ If anything crops up from reviewing priorities or the mid-term view, it's important to capture the issues immediately, ascertain a course of action, and appoint an accountable team member
- ✓ It's a light touch look at top line challenges:
 - ✓ Investigate — what is the cause
 - ✓ Control — who is accountable
 - ✓ Review — issues already raised to ensure they are being progressed



Share movements

- ✓ Create visibility for the team for all colleague movements
- ✓ Empower teams to make choices about how to set their weeks up for success incorporating remote options
- ✓ Quick fire and perfunctory



Track results

- ✓ It's important to hold space for teams to discuss results. This allows us to celebrate when targets are hit and course correct if activities aren't performing as well as hoped
- ✓ Ladders back up to the goals. Team members present their own results and should be empowered to answer questions about how campaigns are performing.
- ✓ Not a deep dive — this should be saved for team meetings, but a way to look at the bigger picture i.e. annual income, annual prospects rather than RR% or CTR of individual activities



Celebrate success

- ✓ After checking in on results (team shared success) offer time for individual successes
- ✓ Empower teams to see how the small wins lead to the big. You can combine this with learnings to embed a culture of growth mindset
- ✓ I normally close the huddle with this to end on a high



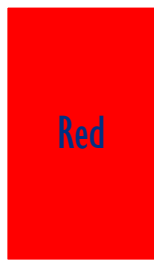
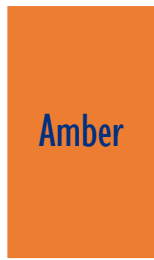
Make it your own

- ✓ Co-create your board at the start of each financial year with your teams
- ✓ Ensure the things you need to track are included but ask the team what else they would like to monitor
- ✓ This can be a chance for a bit of fun or to embed team-wide culture, such as scanning the sector for inspiration



Let's bring the board together

Energy



Capacity



Priorities and goals

Goal 1	Goal 2	Goal 3	Goal 4
Team member priority	Team member priority	Team member priority	Team member priority
Team member priority	Team member priority	Team member priority	Team member priority
Team member priority	Team member priority	Team member priority	Team member priority

Team movements

Who	Mon	Tues	Weds	Thur	Fri
Tim		WFH			Day off
Sally	A/L		000 meetings	WFH	
Sam	WFH	Non-work day			000 AM

Mid-term view

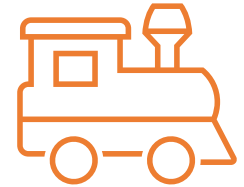
	Mar	Apr	May	Jun	Jul	Aug	Sep
Goal 1	Key activity						
Goal 2		Key activity					
Goal 3					Key activity		Key activity
Goal 4			Key activity				

Learning and success

	Learning	Success
Tim		
Sally		
Sam		

Issues log

Issue	Correction	Who	Date raised	Status
DM copy late	Call with agency	Tim	Feb-24	Active
Printer broken	Contact IT	Sally	Jan-24	Active
Agency invoice unpaid	Email finance	Sam	Dec-23	Resolved



Inspiration station

Development Dose

Goal: \$300k

\$200k

\$100k





Taking your board online

- ✓ During the pandemic we had to quickly pivot to take our VMS online
- ✓ Because our daily huddles were a team habit, we had the channels created to move easily into huddling remotely
- ✓ In actual fact, the daily huddle became an essential touchpoint as we guided teams through the pandemic and navigated a new world of work
- ✓ If you have remote teams, this type of board can easily be created using Teams functionality or other Microsoft programmes to allow your teams to benefit from visual management



Recap: Visual Management Systems

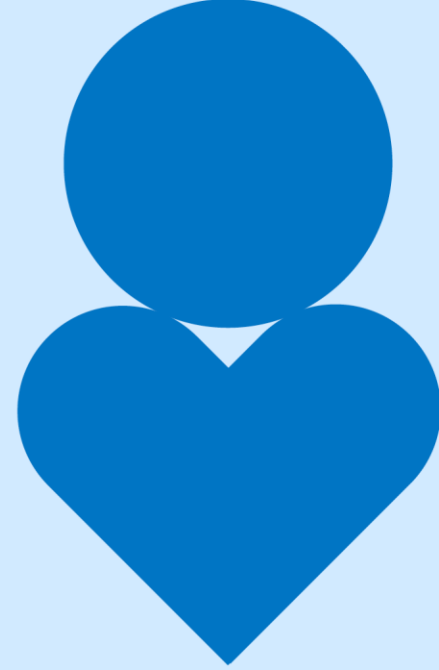
- ✓ Allows your teams to be their authentic selves at work
- ✓ Sees employees as the whole person and connects back to the mission
- ✓ Tracks core team goals ensuring everyone is on the same page and empowers individuals to see how their work adds to the bigger picture
- ✓ Lets you quickly identify issues and course correct
- ✓ Holds you and your team to collaborative account
- ✓ Creates a weekly stand-up meeting to connect as a team
- ✓ Works on and offline creating an essential check in to engage and empower your teams



Any questions?

- ✓ Feel free to get in touch
- ✓ f.riley@askright.com

**FIA
Conference**
2024



Thank you



Fundraising How To Track
Sponsored By:

