**Kimberley Jutze**

**More Clients Preparation**

**Ideal Clients**

***General Description:*** My ideal clients are networks, alliances, and coalitions that are working at the national and regional levels to advance social, economic, and/or environmental justice. Their members are smart, talented people who represent the civic, private, and public sectors. Collectively they have developed an initial track record of success, but are having difficulty working well together because they have neglected to develop the trust, commitment, and accountability necessary for making further progress in their work. However, they have sufficient funding to work with an organization development consultant who is experienced in human and organizational systems change to help them overcome these challenges.

***Personality Profile:*** Juanita is the executive director of a national network of nonprofit, business, and local government leaders that has set an ambitious goal of achieving 100% divestment from the fossil fuel industry among individual and institutional investors in the U.S. by 2025. In the two years since this network was formed it has helped to build awareness about fossil fuel divestment as a key component of a comprehensive approach to addressing climate change. The network, which operates virtually across the U.S., currently has 50 dues-paying members who have formed regional working groups for outreach, advocacy, and transitioning to environmentally sustainable investment alternatives.

Although the network got off to a strong start, in recent months there has been a dwindling of enthusiasm among members who are having difficulty sustaining positive momentum as unanticipated obstacles are encountered, like increased federal funding for fossil fuel projects. A rift has emerged within the network in which there is a fundamental disagreement about the best way to address these obstacles. One faction, which primarily consists of representatives of community-based nonprofits and environmental activists, has called for direct actions, like human blockades, to stop current projects and draw more public attention to the need for divestment. The other faction, which consists of impact investors, university endowment managers, and foundation executives, favors working behind the scenes to convince influential members of the philantrhopic community to join the movement. This group is concerned that investors may want to publicly distance themselves from a network seen as being too radical.

The network is currently at an impasse about how to move forward. Juanita is unsure whether to help the group find an acceptable compromise or create the space for both groups to pursue their separate approaches. Further complicating matters is tension among the nonprofit members of the network who are competing with each other and with the network for funding. She is struck by the irony that what was once a unified, diverse, and committed group representing different sectors and geographies has since devolved into a state of disunity, distrust, and factional competition for control of the future of the network.

**Ultimate Outcome**

We help leaders who are agents of positive change in their workplaces and communities develop healthy and productive teams, organizations, and networks.

**Core Client Question**

How do we overcome distrust, lack of organization, and limited resources to achieve impact that is beyond the reach of a single person or organization?

**Success Story**

A friend and colleague invited me to facilitate a 2-hour workshop as part of an off-site retreat he was organizing for nonprofit directors to foster improved teamwork within their leadership team as well as within the teams each director led. To prepare for this retreat, I conducted individual interviews with each member of the leadership team, including the person who hired me. Through these conversations I learned that: (1) there was a lack of clarity about roles and responsibilities due to recent restructuring; (2) staff were over-worked, which was partly due to an entrepreneurial culture that rewarded creating and taking on new initiatives; and (3) lack of role clarity and concerns about not wanting to add to the burden of over-worked staff prevented the directors from asking each other and their team members for support. The impact of this behavior was confusion, feelings of overwhelm, and lack of self-care, all of which made it difficult for the directors to work together as a high-performing team.

To address this situation I designed and facilitated a customized workshop during which the directors gained insight about their preferred styles for giving and receiving support. They also practiced using an approach for asking each other for support to address a specific problem they were encountering in their work. Practicing the technique of giving and receiving support prompted a realization among the directors that although they spent a lot of time talking about the work that needed to get done that they hadn’t, up until this point, taken the time to discuss problems they were encountering and ways to solve them. The outcome of this workshop is that the directors agreed to meet every week for about 15 minutes in which the only topic was to take turns requesting support and making arrangements to address these problems. Some directors also decided to use the process of requesting and providing support with their teams.

**Values**

These values are most important to me in my business. They impact my business and my life in the following ways:

1. ***Helpful:*** I derive the most satisfaction in my work with clients by being helpful. I enjoy helping them to achieve break throughs in solving organizational problems in ways that stay solved. This value has enabled me to be a good networker in that I take the initiative to connect my contacts with other people and resources that are useful to them. Being helpful is my top value because this was the behavior that was most rewarded in my family growing up. Being helpful is a core personality trait and is often how I assess the impact I’ve had on the people in my life.
2. ***Supportive:*** One of the most important things I learned in my training as an organization development consultant is that any kind of change can only be successful if there is support for it. An important part of my change work with clients involves helping them develop support systems at the organizational and inter-personal levels. Having encountered significant professional and personal challenges throughout my life I recognize the value of support and have invested in developing a robust support system consisting of my family, friends, colleagues, and mentors.
3. ***Honesty and Integrity:*** Central to my work is consistently modeling honesty and integrity in interactions with my clients. This includes being open and honest with them about what they can expect in working with me as well as the opportunities and risks associated with leading and managing systems change efforts. These values also show up in my business in my willigness to admit when I’m wrong and immediately taking immediate steps to rectify problems. Living a life based on honesty and integrity goes back to my childhood in which these values were instilled in me by my parents.
4. ***Trustworthy:*** Being an organization development consultant is, in some ways, like being an organizational psychiatrist. This means that I’m privy to lots of sensitive information. An important part of my work involves developing trusting relationships with my clients and people working in the client organization. I’m good at developing a rapport with people and putting them at ease so that they are willing to share openly and honestly about what is and isn’t working. In my personal life I’m good at keeping secrets and for also listening more than speaking, which is one of the benefits of being an introvert ☺.
5. ***Customer Service-Oriented:*** In my business, I strive to deliver excellent customer service 100% of the time. This means treating every client as a VIP by responding to phone calls and emails as soon as possible during business hours, being pro-active in avoiding and addressing problems, and using client feedback as part of assessing quality and satisfaction with services provided. The impact on my life is that by putting my clients first, I have a tendency to neglect my own needs. In recent years, I’ve made a conscious effort to take better care of myself in addition to working in and on my business.
6. ***Impact-Driven:*** What motivates me in my work as an independent consultant is a desire to help my clients bring about larger-scale systems change that cannot be achieved by a single person or organization. A good example of this is creating an environmental justice movement that advocates for divesting from fossil fuels. Being impact-driven has also influenced my personal life in that issues of social, economic, and environmental justice are deeply important to me. Outside of work I’m a social activist, which is a way for me to stand up for what I believe in and speak out against injustice.
7. ***Continuous Improvement:*** I conduct reviews of all of my consulting assignments to understand what worked well and what can be improved upon. This includes feedback from the client and my own observations. An important part of my work is not only identifying and capturing lessons learned, but also applying ideas for improvement to the next consulting assignment. As an avid learner I seek out opportunities to learn and do better in all aspects of my life. The shadow side of this value is that I’m a perfectionist. In recent years I’ve made a conscious effort to be aware of this tendency by not letting it get in the way of putting myself out there. I’ve also been working on my tendency to not be too hard on myself when I make mistakes.
8. ***Accountable:*** I hold myself accountable to my clients by delivering the services that we’ve agreed upon to the best of my ability as well as on time and on budget. I also hold myself accountable for following through on the administrative, legal, and financial requirements of owning and operating a business. Accountability is an important part of the consulting work I do in that I help teams and groups of oganizations hold each other accountable by clarifying their expectations of each other and creating a mechanism for following through on commitments. The same is true in my personal life in that I make it a point to keep the promises I make to myself and other people.

**Business Vision**

My business and my life right now is great! In fact, my life is the best it’s ever been. I’m happy, healthy, and consistently perform at my best. I’m an agent of positive change for myself as well as for my family, friends, and clients.

I’m in high demand as a consultant, coach, trainer, and thought leader because of the powerful and sustainable results that I’ve helped nonprofit and business leaders achieve. I work with the smartest and most talented people to help solve the world’s most pressing challenges, like racism, economic inequality, and climate change. I help these changemakers, like executives at Ashoka, B Lab, Green Peace, and Living Cities, form collaborative networks of organizations that use their collective capacity to create larger-scale positive change that is beyond the reach of a single person or organization. In addition to helping my clients collaborate effectively to bring about positive change in their workplaces and communities, I have a steady stream of new and repeat clients who are eager to work with me. My business is also financially successful with an annual revenue ranging from $250,000-$500,000.

Although I’m consistently able to work as much as I like, I maintain a happy and healthy life outside of my home office near the ocean. I have a vibrant social life that includes spending quality time with my life partner, family, and friends. I practice self-care through regular exercise and hobbies, like going to the gym, horseback riding, and yoga. I also travel around the United States and to other countries for vacations. In my spare time I advocate for social, economic, and environmental justice as a social activist.

This is how I got to where I am now. I learned about the More Clients Program from a consultant in my professional network who achieved break through results in her marketing efforts and continues to use this process. After talking to Robert Middleton and learning more about his approach to marketing, I was excited to learn that I had finally found the marketing coach I had been seeking since starting my business several years ago who has a proven approach that is well suited to my business. Through the More Clients Program I learned about the importance of building and maintaining relationships as the gateway to generating a strong, steady income doing the work I most enjoy with my ideal clients. With the marketing and sales skills I mastered through this program, I also learned how to build a happy and healthy life for myself in the midst of growing a thriving business.

A key turning point in my life occurred in 2020 in the midst of the coronavirus. At that time I was struggling in my business and in my life. I was working very hard and my business was going nowhere. In fact, I no longer had any clients and was rapidly running out of money. To make matters worse, I was living alone and felt very isolated, especially since in-person social activities were no longer available to me. In essence, I was having a personal and professional crisis in the midst of a global pandemic. Feeling like I was at the end of a rapidly fraying rope, I realized that my current ways of working and how I was living my life were no longer useful and that it was time for significant change.

It was around this time that I attended a free webinar that Robert hosted on Going Radically Virtual in the Time of the Coronavirus. This webinar served as the spark I needed to begin making a radical shift in how I related to myself and my business. Through this experience I learned the importance of serving as a resource to my ideal clients as well as ramping up outreach through both individual conversations and broader communication. I also learned about the importance of adopting the mindsets that are needed to successfully transition to a 100% virtual business. In reflecting on my life I realized that protecting myself from fear of failure and rejection were keeping my safe, but they were also keeping me stuck. Shortly after this webinar I journaled about who I need to be right now.

The insights I gained from the struggles I was having in my business and the changes I needed to make to adapt to a new way of working resulted in a significant break through. In thinking about a new program I could offer that would draw upon my strengths to deliver high value for my ideal clients, I discovered that there was a wide open opportunity to help them solve a significant problem that no one to my knowledge was helping them solve. What made this discovery possible was a decision to stop pushing away a skill set I disliked using and embracing it in a way that serves me and my clients. Most importantly, I realized that success isn’t only about doing the right things; it’s also about having the right mindset.

**High-End, Outcome-Based Program**

Collaborative Fundraising for Systems Change is an online multi-session cohort-based program that teaches participants how to grow and diversify their network’s sources of funding. The ultimate outcome of this program is that participants will learn how to solve the problems that are getting in the way of obtaining the funding and other resources needed to achieve collective goals. They will learn the skills and techniques to solve the root causes of fundraising problems, which are actually organization development challenges.

Program Goals:

1. Identify, leverage, and effectively deploy network fundraising strengths.
2. Grow and diversify sources of funding.
3. Address the underlying causes of problems that are getting in the way of fundraising.

From August-September 2019, I interviewed 17 network leaders to learn about their collaboration challenges. The #1 challenge that was mentioned by almost every interviewee was the need for more funding. These specific fundraising challenges included:

* ***Lack of dedicated resources for network activities and operations.*** Members tend to be volunteers with limited time and other resources to commit to network activities. Regardless of whether a network is supported by a backbone (host) organization, funding is needed to cover the costs of supporting, coordinating, and facilitating the work that network members are doing together.
* ***Reluctance of network members to participate in fundraising.*** Some network members have been unwilling to participate in fundraising because they see it as someone else’s job. However, successful fundraising requires a team effort. Although there needs to be a single point person to lead and coordinate fundraising efforts, everyone needs to pitch in. This doesn’t have to mean that everyone asks for money, but it could involve helping to identify funders and helping to build relationships that result in funding, for example. Another reason why some network members have been reluctant to participate in fundraising is that they view funding for the network as taking away money from their own organization. Fear of losing funding is essentially a win-lose mindset. It also reflects a tension in the network about how to raise funds without resulting in a loss of funding for members.
* ***Making a persuasive case for support to funders.*** This is about convincing funders to provide funding to neworks, which is often perceived as a risky investment. This is because network funders, who are typically foundations, corporations, and government agencies, are used to funding individual nonprofits to deliver a program or service that has clear start and end dates and is known to produce specific results. In contrast, network members are often volunteers who have full-time jobs and participate in their spare time. Also, collaboration is often difficult and takes a lot of time and effort. However, the benefit of networks is that they have the potential to achieve larger-scale change that individual organizations are unable to accomplish on their own.

What all of these fundraising problems have in common is that they are all people problems. In other words, the skills needed to successfully raise funds are the same skills needed to build healthy and productive networks, which is building trusting, collaborative relationships. The ultimate outcome this program will produce is that in learning how to solve their fundraising problems, program participants will learn how to build healthy and productive networks that are capable of securing the funding and other resources needed to achieve their goals.

Collaborative Fundraising for Systems Change is different from other programs available in the market because it is designed to do something I’m fairly certain no other program is doing. This is applying human systems and organization development practices to solve fundraising problems that are capable of producing systems change on two levels: (1) developing the capacity to raise more funds contributes to the growth and stability of the network; and (2) access to more funding provides the resources the network needs to address larger, more complex problems that it was formed to address.

Through my experience in nonprofit fundraising I’m aware of free and affordable high-quality fundraising services that are available in the market. Candid (formerly Foundation Center) and Network for Good, who are among the best known, offer a host of trainings, tips, and tools for raising money in a variety of ways from all kinds of funders. There is also a large pool of consultants and consulting firms who specialize in helping nonprofits raise funds, many of whom serve as experts for hire in performing fundraising tasks that nonprofits lack the resources or expertise to do themselves, like developing a fundraising campaign or writing a grant application. Instead of entering an already saturated market to do work I don’t enjoy doing, I will provide a curated list of these resources to potential clients, and anyone else who need this kind of fundraising help, as a free giveaway. This list will also be provided to clients, which they will be encouraged to use leading up to and throughout the program.

Through my experience as an organization development consultant I’ve met other practitioners who work with networks to help solve organization development problems through coaching, training, and consulting, but I have yet to meet anyone who is also experienced in fundraising. As part of developing this program I will meet with past and potential clients, as well as fundraising and organization development professionals, to further assess the demand for this program, which is also an opportunity to learn about potential competitors.

The Collaborative Fundraising for Systems Change program will consist of a cohort of 15-20 participants (although a minimum of 12 would be needed to run the program) who are representatives of networks, alliances, coalitions, and associations that are advancing social, economic, and environmental justice. The cohort would meet online via Zoom 1-2 times per month for 90 minutes per session over a period of 6-10 months. (Details will be finalized as program materials are developed and feedback is obtained from potential clients).

The general structure of each session will consist of:

1. Cohort Development: Build a cohesive, tusting, collaborative, and supportive cohort through a combination of relationship building activities, such as check-ins, icebreakers, and small group work.
2. Instructor-Led Learning: Short trainings on topics that will likely include: identifying and leveraging network fundraising strengths, creating a collaborative fund development plan, clarifying network members fundraising roles and responsibilities, setting expectations for network member participation in fundraising, creating a funder case for support, and developing a network fundraising culture. Session topics will draw upon organization development frameworks that are applied to a fundraising context, such as the star model for organization design, human systems development, and collaborative innovation. Participants will be required to complete an assessment before the program begins that will include information about their fundraising skills, specific fundraising problems they would like help solving, and what they would like to get out of this program. Although training content will be prepared in advance, delivery will be adjusted to focus on participants’ specific needs.
3. Small Group Work: Participants will work together on an exercise that relates to the session topic. This will enable them to immediately practice what they’ve learned in a safe and supportive space before bringing it into their network. Small group work also creates an opportunity for peer learning in which participants will be encouraged to share their own experiences about what has and hasn’t worked. Through an exercise debriefing particants can share what they learned with the rest of the cohort.
4. Action Steps: Each session will end with specific action steps (i.e., homework) to be completed between sessions. For example, providing a template participants can use to work with their network members to identify and analyze strengths for growing and diversifying sources of funding.

In between sessions I will provide 1-2 60-minute online coaching sessions for each participant to help them complete session assignaments and provide additional support for network fundraising, such as providing feedback on a draft fund development plan or coaching how to have a difficult conversation with a funder or network member.

Participants will work with members of their network between sessions on fundraising activities, such as creating and implementing a fund development plan, preparing a funder case for support, identifying and cultivating potential funders, and other fundraising activities. Participants will be encouraged to keep in touch with each other between sessions as part of their support system for addressing fundraising challenges. (Note: I will introduce a contracting for support exercise early on in the program as part of developing a cohort support system.)

Program benefits include:

* Practical: Skills-based, action-oriented.
* Effective: Solves the underlying causes of fundraising challenges.
* Peer-Learning: Through getting to know each other better and small group work, participants will have the opportunity to contribute to each other’s learning (e.g., collaborative problem solving and sharing ideas and best practices).
* Sustainable: Teaches participants how to solve problems in ways that stay solved.
* Supportive: Participants practice techniques in the cohort, which is a safe space for experimentation. Participants will also be supported in applying what they learned to their network through individual coaching sessions with the instructor.
* Guaranteed Results: If the network doesn’t raise at least twice as much money as they invested in the proram, I will keep working with them for free until this happens.

The fee for this program is $5,000 per participant for a total of $100,000 per 20-member cohort. Most likely there would only be one cohort per year. (Note: The size of the cohort will be limited to 20 participants to keep the group size manageable for a single instructor and enable participants to get to know each other.) Potential participants would be required to fill out a short online application form. I will also screen participants by conducting an online interview to further assess their interest, commitment, and ability to pay.

Developing this program will require:

* Application form, online payment processing system, and pre-program assessment form
* Program outline, session content, and materials
* Program dates and times
* Marketing materials
* Marketing plan
* Program participation policy
* Program monitoring to assess pace and quality
* Program completion and follow-on engagement (e.g., upsell to network development consulting services or a passive income stream, which would need to be determined)

Ideal clients for this program would come from the following sources:

* Empathy interviews I did in August-September 2019 (potential clients)
* Past clients (e.g, Ashoka, National Justice for Our Neighbors, and Alliance for Regional Cooperation)
* LinkedIn contacts
* Organizational affiliations, such as: Network Weaver, Collective Impact Forum, Conveners.org, B Lab, Co-Creative Consulting, Tamarack Institute, and NetCentric Campaigns

This program would make a significant difference by enabling me to do the work I’ve always wanted to do, which is facilitate systems change. I would be more helpful to my clients by helping them solve a significant pain point that no one else seems to be helping them with. I would also feel more confident in delivering a program that draws upon my strengths. I would be positioned to finally reach my revenue goal. Earning enough money to have a comfortable life would give me the freedom to do things I’ve been putting off, like having a more robust social life, owning a home, pursuing hobbies, and taking vacations. Most importantly, this program represents a significant breakthrough in my thinking by embracing fundraising in a way that best serves me and my clients instead of pushing away a skill set I don’t enjoy using.

**Strengths and Weaknesses**

Strengths I bring to More Clients Program are:

* Strong Work Ethic
* Collaborative and Cooperative
* Customer Service-Orientation
* Learning and Self-Improvement
* Perseverance
* Persistance
* Passion (for making a positive difference)
* Trustworthy
* Honesty and Integrity
* Accountable
* Helpful and Supportive
* Networking (connecting people to other people and resources)
* Relationship Building
* Writing
* Interviewing (asking insightful questions)
* Research
* Analytical (idenfiy underlying issues, patterns, and trends)
* Creative Problem Solving
* Cross-Cultural Communication
* Strategic
* Action-Oriented
* Program Design and Management
* Meeting Design and Facilitation
* Consulting
* Coaching
* Training
* Systems Thinking
* Nonprofit Management
* Organizational Capacity Building
* Fundraising

Weaknesses that contribute to holding me back are:

* Fear of failure
* Fear of rejection
* Fear of not having enough money
* Self-doubt and feelings of inadequacy
* Under-valuing myself
* Self-limitations/disempowerment
* Too hard on myself
* Judgemental
* Defensive
* Stubborn
* Deficiency-Oriented (trying to fix what’s wrong with me and my business)
* Procrastination/paralysis (when I’m not sure what to do)
* Impatience
* Feelings of stress and anxiety
* Feelings of frustration and anger
* Not getting enough rest and relaxation
* Poor math/financial skills
* Selling
* Envy people who are more successful than me
* Lack of business education or professional training

**Commitment**

My commitment to the More Clients Program consists of the following agreements:

1. Complete all assigned tasks on time and to the best of my ability.
2. Take my marketing and sales skills to the next level by applying what I’ve learned from the More Clients Program and other coaches I’ve worked with.
3. Step further outside of my comfort zone to achieve breakthrough results.
4. Contribute to the learning of other members of the program by sharing successes and lessons learned.
5. Support other members of the program in improving their marketing and sales skills.