Session Overview and Ice Breaker (30 min)
Goal: To introduce cross-sector partnerships and how to build your pipeline

<table>
<thead>
<tr>
<th>Time</th>
<th>Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:45 – 9:00</td>
<td>Welcome</td>
</tr>
<tr>
<td>9:00 – 9:30</td>
<td>Session Overview and Ice Breaker</td>
</tr>
<tr>
<td>9:30 – 10:00</td>
<td>Introduction to Cross Sector Partnerships and Lessons Learned</td>
</tr>
<tr>
<td>10:00 – 12:30</td>
<td>Building your Pipeline (<em>Group Activities – Debrief</em>)</td>
</tr>
<tr>
<td>12:30 – 1:30</td>
<td>Lunch</td>
</tr>
</tbody>
</table>
Goal: Initiating a partnership and developing tangible next steps for each organization

<table>
<thead>
<tr>
<th>Time</th>
<th>Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>1:30 – 2:30</td>
<td>Getting Ready to Pitch <em>(Group Activities – Debrief)</em></td>
</tr>
<tr>
<td>2:30 – 4:00</td>
<td>Making Initial Contact <em>(Group Activities – Debrief)</em></td>
</tr>
<tr>
<td>4:00 – 4:30</td>
<td>Managing the Partnership</td>
</tr>
<tr>
<td>4:30 – 5:00</td>
<td>Closing</td>
</tr>
</tbody>
</table>
By the end of this session, we’d like you to walk away with:

- Partnership experiences and lessons learned
- Insight into the private sector perspective
- Approaches for identifying potential partners
- How to manage your pipeline and prioritize opportunities
- Activities involved in developing a partnership opportunity
- A framework to prepare for partnership pitches
- An understanding of how to move forward after initial contact
Partnerships are long conversations. Let’s keep these to <140 characters.

Who are you? What’s your background? What’s your passion?

What group are you representing? What role do you play within Fundacion Plan?

Why are you here? What do you want to get out of this session?
An Introduction to Cross Sector Partnerships
(30 min)
Why Are We Talking to You about Partnerships?

The sector is changing. Donors are changing. The private sector is changing.

USAID Global Development Alliance

Gates Foundation

Clinton Global Initiative

DFID Innovation Facility

Unilever

Citi

United Nations

SSIR

HBR

WEF Meeting @ Davos

There exist few nonprofit organizations that can answer the call and understand how to pursue, initiate and manage partnerships.
Trend of increasing inter-linkages between the corporate sector, the nonprofit sector, and the public sector in the domains of business, sustainability and global development.

**Why Are We Talking to You about Partnerships? Convergence of Sectors**

**Cross-Sector Convergence**

**Private Sector**
Companies are increasingly engaging in global development issues due to both new pressures and new opportunities.

**Impact on social, economic, environmental challenges**

**Public Sector**
Governments are increasingly seeking to leverage private sector to provide services traditionally managed by public sector (health, education).

**Development Sector**
Non-profits are increasingly relying on partnerships with companies and governments in order to maximize impact, leverage additional resources.
Why Are We Talking to You about Partnerships? Convergence of Ideas

The challenges facing our planet today are systemic in nature and require integrated rather than siloed responses.

From silos......

Millennium Development Goals

**MDG 1** Eradicate extreme hunger and poverty

**MDG 2** Achieve universal primary education

**MDG 3** Promote gender equality and empower women

**MDG 4** Reduce child mortality

**MDG 5** Improve maternal health

**MDG 6** Combat HIV/AIDS, malaria, and other diseases

**MDG 7** Ensure environmental responsibility

**MDG 8** Develop a global partnership for development

.....to systems

Why Are We Talking to You about Partnerships?

Convergence of Focus

Funders of development will change focus from issue to outcome requiring systems solutions to global problems enabled by cross-sector partnerships.

Organizationally agnostic

• Identify partner or partners that have the best capabilities for delivering
• Impact will trump sector, tax status or brand

Market driven

• Harness power of markets but often catalysed by innovative financing mechanisms
• Intelligent and supportive regulatory environment

Sustainable and scalable:

• Solutions that are maintained over time and not dependent on a single funding source
• Become scalable when they have been developed and proven systemically

Source: John Elkington, Volan Ventures
What Are Partnerships? A Basic Definition

“Partnerships are commonly defined as voluntary and collaborative relationships between various parties, both State and non-State, in which all participants agree to work together to achieve a common purpose or undertake a specific task and to share risks, responsibilities, resources, competencies and benefits.”

- Report of the UN Secretary-General
What Are Partnerships?
Principles of Partnership

Equity?

because it leads to

Respect

Transparency?

because it leads to

Trust

Mutual Benefit?

because it leads to

Sustainability

Copyright: Tennyson: The Partnering Toolbook
Why Partner?
Benefits of Partnering for NGOs

- Jointly develop new sustainable and inclusive solutions
- Harness new technologies
- Access increased pool of knowledge, experience, skills, networks, assets, labour, products, services, and funding
- Build skills and capabilities via knowledge / tech transfer
- Increase operational efficiency
- Influence consumer behavioural change, government stakeholders, and commercial investment
- Leverage corporate reach/scale, networks and resources
- Strengthen credibility and raise profile amongst business community and beyond
Why Partner?
The Private Sector’s Perspective

Contrary to conventional wisdom, business interests and success can also lead to greater development impact.

Inclusive Business
- Local sourcing
- Extended supply chain

Brand and Reputation
- Differentiated products
- Greater employee engagement

License to Operate
- Increased influence with governments
- Consumer expectations of business

Commerical Impact

Societal Impact

Improved Livelihoods
- Increased employment opportunities

Access to Basic Services
- Ability to leverage reach of corporate supply chains

Human Capital Development
- Market-relevant skill development

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What Kinds of Partnerships are we Seeing? The Evolution of Partnerships

Systemic change will require more effective, transformational partnerships.

**Transformational**
- Multi-stakeholder approach, systematically changing the rules of the game
- Interventions & solutions to make markets work, improve enabling environments and frameworks, and set global standards

**Strategic**
- Leverages core competencies of partners to develop market and pilot new products & services
- Explicit sharing of risk, resources and responsibilities
- Tends to be bilateral agreement set up within existing system

**Opportunistic**
- Program or intervention that brings short-term benefits
- May leverage core competencies of partners, but in an ad-hoc manner

**Philanthropic**
- Discrete effort or relationship, with emphasis on PR and financial contributions

---

Increased Complexity, Investment and Impact
How do Partnerships Work? Important Challenges to Recognize

- Selecting partners & defining value for each
- Culture
- Integration and execution
- Resource constraints
- Capability gap
- Performance management
**Lessons Learned: Getting Started**

**Vision:** Partnerships are formed around a common vision, and complementary skill sets (technical, human, knowledge, physical and financial resources) and resources (trust, financial, infrastructure).

**Leadership:** Champions get things started, systems and structures keep them running; Internal buy-in to engage with companies.

**Investment:** Partnerships typically require a heavy investment of time upfront to appropriately engage each partner and an ongoing investment to maintain.

**Transparency:** Understanding the differing drivers and priorities of partners can create increased trust and engagement across organizations.

**Local Buy-In:** Partnerships benefit from external inputs and interventions. Still, there must be local support for any global action; (G)local partnerships.

**Defining Partnership Roles:** The role of each organization and individual in the partnership may and should evolve over time.
Lessons Learned: Managing and Measuring Success

**Communication:** Ongoing, transparent and clear communication builds trust and enables the partners to work together to overcome challenges and course correct when necessary.

**Pace and Scale:** Set the right pace and scale (Pilots) – geographic & services

**Budget:** Funding commitments and structure should mirror the timeframe and strategy of the partnership and allow flexibility to adapt to challenges or engage new opportunities.

**Evaluating Success (Outcomes):** Success means different things for different partners. Clearly define each partners’ measures of success early and revert back to them regularly to check in on progress / commitment.

**Evaluating Success (Partnership):** Establish processes upfront to evaluate the value-add of partnering throughout the partnership (i.e. 1+1 = 3).
Building your Pipeline
(2.5 hours)
Guideline for Building a Partnership Pipeline

It has been said before and we’ll say it again; private sector partnerships are more of an ‘art’ than a ‘science’. When it comes to building a pipeline of opportunities, there are no concrete rules for how to find initial opportunities and contacts. The best way to proceed is to identify possible avenues for building relationships, and build a plan to start making calls, networking, and scouting. The following steps should provide some guidance on how to get started:

- **Identify the Prospects**
- **Prioritize the Prospects**
- **Manage the Prospects**
Identifying the Prospects
Identify the Prospects Framework

‘High potential opportunities for youth employment solution’ fall at the intersection of need (youth, economic) and opportunities (private sector, our capabilities and solutions)
Potential Partners
Market Scan Methodology

Identifying the Opportunities for Employment

<table>
<thead>
<tr>
<th>Sector</th>
<th>Industry</th>
<th>Sub-industry</th>
<th>Area</th>
<th>Location</th>
<th>Issues</th>
<th>Driver</th>
<th>Solutions</th>
</tr>
</thead>
</table>

- **Selection Criteria**
- **Example**
  - Private / Public / Civil
  - Resources / Products / Agriculture
  - Utilities / Hospitality / Farming
  - Rural / Urban
  - Bogota / Cali / Cauca

- **Co-creation**
  - Competence / Retention / Experience
  - Skill Gap / Policy Environment / Job Readiness
  - *Game-changing solutions to increase youth employment*
Potential Partners
Market Assessment Selection Criteria

At each stage of the landscape assessment, we have put in place a number of criteria to ensure that only the most impactful areas and opportunities are identified.

<table>
<thead>
<tr>
<th>Question</th>
<th>Selection Criteria</th>
<th>Answer</th>
<th>Justification</th>
<th>Hypothetical Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Whose need are we addressing? (Employer/Employee)</td>
<td>• Which group has the most influence, power and capacity to affect large scale change?</td>
<td>Example: The creation and fulfillment of jobs is what fuels the economy and one of the main drivers of GDP.</td>
<td>Demand</td>
<td></td>
</tr>
<tr>
<td>Which sector are we focusing on? (Public/Private/Civil)</td>
<td>• % of workforce employed by sector • % GDP generated by sector • # jobs available in sector</td>
<td>Example: The Private Sector is the largest employer in Colombia. It is also the fastest growing sector.</td>
<td>Private</td>
<td></td>
</tr>
<tr>
<td>Which industry are we focusing on? (Resources/FS/Agriculture, etc.)</td>
<td>• Hiring capacity • Opportunities for developing an ‘inclusive’ supply chain • Growth potential • Size (as % of GDP) • Relevance of sector to youth (in terms of skill level required)</td>
<td>Example: Hospitality</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Which sub-industry are we focusing on?</td>
<td>As above</td>
<td>Hotels</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check point: Is there an organization in this sub-industry that is experiencing employment (skills, availability, retention, job protection, job creation) challenges that apply across Indonesia? If Y, skip to Q 7.</td>
<td>N</td>
<td>Urban</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Are we focusing on Rural/Urban areas?</td>
<td>• % of industry operations in rural vs urban</td>
<td>Cauca</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Which town city?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>What are the main issues that inhibit youth employment/opportunities to enhance youth employment (in that sub-industry in that location)?</td>
<td>Note: main issues will be identified through stakeholder engagement. We will identify key organizations operating in the impact areas identified in ‘Diagnose’.</td>
<td>Poor infrastructure Perception of education Communication skills (company needs English, youth don’t speak it) Youth find it difficult to identify jobs</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Potential Partners
Sources of information for identifying potential partners

The following table contains some suggested ideas for generating a pipeline

<table>
<thead>
<tr>
<th>Sources</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Internet</strong></td>
<td>The internet is filled with various sites that contain summary-level and detailed business lists.</td>
</tr>
<tr>
<td><strong>Conferences</strong></td>
<td>Conferences are a great way to get a deeper look at which organizations are key players within certain industries / sectors. They are also a great way to build early rapport with potential partner (this is typically more effective than a cold-call)</td>
</tr>
<tr>
<td><strong>Business and Academic Associations</strong></td>
<td>Associates often have regular meetings, conferences, and industry speakers. Membership with various associations is an excellent way to embed yourself in a certain group of organizations, establish credibility and build long-term relationships.</td>
</tr>
<tr>
<td><strong>Networks</strong></td>
<td>The power of networking is unlimited. This is supported by the sales notion that “80% of your sales come from 20% of your customers”. If the world truly has six degrees of separation, than you network is the best tool you have for building a partnerships pipeline.</td>
</tr>
<tr>
<td><strong>Subscriptions</strong></td>
<td>Quality subscriptions are a great way keep in touch with industry trends and spot emerging organizations.</td>
</tr>
<tr>
<td><strong>Other Country Programs and the Region</strong></td>
<td>Ensure you are sharing your BD Pipeline with your neighboring country offices and the Region. Not only could you discover new opportunities outside of year typical realm of interaction, but your messaging will be consistent.</td>
</tr>
</tbody>
</table>
Economic Context

Analyze the sectors and industries within your target locations to focus on areas that are projecting job growth.

High Growth Employment Areas

**Colombia**
- Agriculture
- Technology
- Manufacturing/Construction
- Finance

**Brazil**
- Agriculture
- Manufacturing/Construction
- Services
- Retail
### Our Capabilities and Solutions

**Illustrative Examples**

**Define the solutions options related to Youth Employment for which you have an expertise, ability to deliver and are able to add value**

<table>
<thead>
<tr>
<th>Solution</th>
<th>Business Results</th>
<th>Social Results</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Job Placement</strong></td>
<td>• Reduced operating costs</td>
<td>• Improved livelihoods</td>
</tr>
<tr>
<td><em>Talent recruitment for entry-level job opportunities with the private sector (applicable to urban settings)</em></td>
<td>• Scalable workforce</td>
<td>• Improved education</td>
</tr>
<tr>
<td></td>
<td>• Improved brand image</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Secure social license to operate</td>
<td></td>
</tr>
<tr>
<td><strong>Producer Group Development</strong></td>
<td>• Secured supply</td>
<td>• Sustainable development</td>
</tr>
<tr>
<td><em>Strengthen producer associations and multi-farmer networks (applicable to rural settings)</em></td>
<td>• Reduced costs</td>
<td>• Increased private sector investment in rural communities</td>
</tr>
<tr>
<td><strong>Value Added Processing</strong></td>
<td>• Improved productivity</td>
<td>• Improved incomes</td>
</tr>
<tr>
<td><em>Expand the processing of profitable agricultural commodities (applicable to rural settings)</em></td>
<td>• Improved quality</td>
<td>• Increased earning capacity</td>
</tr>
<tr>
<td></td>
<td>• Improved incomes</td>
<td>• Improved job skills</td>
</tr>
<tr>
<td><strong>Micro-franchising (MSME)</strong></td>
<td>• Increased market share</td>
<td>• Increased job creation</td>
</tr>
<tr>
<td><em>Employ youth as company reps to distribute beneficial products to new markets (applicable to rural &amp; urban settings)</em></td>
<td>• Increased market growth</td>
<td>• Improved livelihoods</td>
</tr>
</tbody>
</table>
Youth Profile
Assess the characteristics of your beneficiaries

• Where are they?
• What issues are they facing?
• How many are there?
• What is the social cultural context?
• What is the demographic?
• What are we doing for them?
• What is the theory of change?
Prioritize the Prospects
Activity – Prioritize the Prospects

Now that we have a shortlist of prospective partners, let’s spend 15-30 min as two groups to prioritize this list of partners

Plan Brazil Prospects:

Some things to think about:
• How do I evaluate each partner or opportunity?
• What information do I need to evaluate each partner?
• Which opportunities are worth pursuing?
• What is the required information to make a comprehensive decision about each opportunity?

Timing: 15-30 minutes
For all target opportunities identified, we can focus our attention on the two axes:

**Potential Benefit:**
- Scalability: large market capitalization and growing revenue
- Engagement solutions: availability of opportunities for youth employment
- Footprint: existing or desired presence in target locations. *Note: other locations can be considered based on type and size of opportunity.*

**Ease of Engagement:**
- Limited complexity: decision-maker is accessible and steps to decision are few
- Ease of interaction: simplicity of communications and responsive
- Access to resources: access to people / information
- Limited risk: strong ethical standards and established social responsibility strategy

### Target Prioritization Matrix

<table>
<thead>
<tr>
<th>Potential Benefit</th>
<th>Ease of Engagement</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Low</strong></td>
<td><strong>Low</strong></td>
</tr>
<tr>
<td><strong>High</strong></td>
<td><strong>High</strong></td>
</tr>
</tbody>
</table>

- **Effort Consumers**
- **Key Targets**
- **Distractions**
- **Defer to Future**

**Why use this process:**
- Develop an ongoing pipeline of prioritized opportunities
- Speed up decision making
- Focus on the opportunities with the highest Return on Invested effort
Prioritize the Prospects
Assess the Opportunity

Through a group voting exercise, a Country Program can qualitatively evaluate each opportunity using the agreed-to criteria.

ILLUSTRATIVE

<table>
<thead>
<tr>
<th>CSE Target</th>
<th>Potential Benefit</th>
<th>Benefit Total</th>
<th>Ease of Engagement</th>
<th>Ease Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Macro Criteria 1</td>
<td>Macro Criteria 2</td>
<td>Macro Criteria 3</td>
<td>Macro Criteria 4</td>
</tr>
<tr>
<td>Company A</td>
<td>M</td>
<td>H</td>
<td>H</td>
<td>H</td>
</tr>
<tr>
<td>Company B</td>
<td>L</td>
<td>M</td>
<td>L</td>
<td>M</td>
</tr>
<tr>
<td>Company C</td>
<td>L</td>
<td>L</td>
<td>L</td>
<td>M</td>
</tr>
<tr>
<td>Company D</td>
<td>L</td>
<td>L</td>
<td>L</td>
<td>M</td>
</tr>
<tr>
<td>Company E</td>
<td>L</td>
<td>L</td>
<td>L</td>
<td>M</td>
</tr>
</tbody>
</table>

Notes:
1) Each axis macro criteria can be given a weighting to a total of 100%
2) Be sure to identify any variables that are a go/no-go decision variable (Ex. if it does not pass the Plan values test, than any weighting or scoring of the remaining criteria will not by pass the decision to not proceed).
Prioritize the Prospects
The Final Output

Using the scores, targets can be mapped in the prioritization view

Potential Benefit

Low

Easy of Engagement

Low

High

‘Effort Customers’

‘Distractions’

‘Friendlies’

Key Targets

CSE Target | Benefit Total | Ease Total
--- | --- | ---
Company A | H | H
Company B | L | H
Company C | L | H
Company D | M | H
Company E | L | H

Note: the 2x2 output is calculated via the Prioritization Model from the CSE Guide.
Manage the Prospects
Group Exercise – Manage your prospects (Targets by July 31)

Now that we have prioritized the prospects, let’s translate that into a format we can use to manage the pipeline and follow up on commitments.

<table>
<thead>
<tr>
<th>STAGE</th>
<th>What are we at?</th>
<th>What’s needed?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>RELATIONSHIP</td>
<td>Curiosity</td>
</tr>
<tr>
<td></td>
<td>IDEA</td>
<td>Point of View / Discussion Deck</td>
</tr>
<tr>
<td></td>
<td>OPPORTUNITY</td>
<td>Concept Note</td>
</tr>
<tr>
<td></td>
<td>COMMITMENT</td>
<td>Proposal</td>
</tr>
<tr>
<td></td>
<td>Close the Deal</td>
<td>Contract</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>RELATIONSHIP</th>
<th>IDEA</th>
<th>OPPORTUNITY</th>
<th>COMMITMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Falabella</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Listos</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>SAP</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Makro</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Carvajal</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Banco Agrario</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>ABB</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Colombina</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Getronics</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Fundacion La Catorce</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Getting Ready to Pitch (1 hour)
## Language Conveys the Values of a Culture

### Context and Strategy

<table>
<thead>
<tr>
<th>Value</th>
<th>Civil Sector</th>
<th>Private Sector</th>
<th>Public Sector</th>
</tr>
</thead>
<tbody>
<tr>
<td>Orienting Purpose</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stakeholders</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Preservation of Agency</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>International Development Disposition</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Primary Funding Source</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Decision-Making Approach, Speed</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Language Conveys the Values of a Culture

• The private sector has many priorities, but profit is paramount:
  • **Profit = Revenue (Price x Quantity) – Costs (Fixed Cost + Variable Costs)**
  • Stock price
  • Market share; product differentiation
  • Brand recognition
  • Risk reduction

• The concept of “shared value” is gaining visibility and traction in several industries, but the concept remains nascent.

• The academic and government sectors also speak different “languages”, focusing on variables outside of profit.

• Wherever possible, try to quantify benefits. Regardless of the sector, numbers add conversational value because they put a tangible scale on the size of the benefit. These quantities do not need to be monetary.
So What is Bringing the Private Sector to the Table?

Business Drivers

Cost Savings & Productivity
Access to Supplies
Access to Financial Capital
Human Capital
Brand Value & Reputation
Risk Management & License to Operate
Revenue & Market Access
## Worksheet – Translating our Catchphrases

<table>
<thead>
<tr>
<th>NGO Catchphrases</th>
<th>What will you say to a business?</th>
</tr>
</thead>
<tbody>
<tr>
<td>“We focus on development and humanitarian response…”</td>
<td>We have experience understanding rural environments &amp; can help you overcome challenges there</td>
</tr>
<tr>
<td>“We have a broad and deep reach into communities…”</td>
<td>We can help you extend your products and services to new and untapped markets</td>
</tr>
<tr>
<td>“Our reputation is global, we are recognized as a multi-sectoral INGO…”</td>
<td>We can help you grow in new places by leveraging our global network, brand and deep industry expertise</td>
</tr>
<tr>
<td>“We utilize a local partnership model to…”</td>
<td>We can give you access to locally sourced products via a single point of contact, such as Plan</td>
</tr>
<tr>
<td>“We are working to build resilience in communities…”</td>
<td></td>
</tr>
<tr>
<td>“We work in developing countries to help the poor and vulnerable…”</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>NGO Catchphrases</th>
<th>What will you say to a business?</th>
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<tbody>
<tr>
<td>“We help build capacity of local organizations and partners…”</td>
<td></td>
</tr>
<tr>
<td>“We focus on innovation and sustainability…”</td>
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<tr>
<td>“We believe in integrated development…”</td>
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<tr>
<td>“We provide technical assistance in WASH, health, education, and agriculture…”</td>
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<tr>
<td>“We help improve livelihoods at the base of the pyramid…”</td>
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<tr>
<td>“We want to create shared value…”</td>
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</table>
Exercise – Translating our Catchphrases

• Thinking about “business drivers” and sectoral values, try to adapt your language for the private sector (i.e., communicate your organization’s values and strengths using their language).

• Break into pairs and take turns coming up with clear and concise alternatives for common NGO catchphrases (see previous slide).
An “elevator pitch” is an introductory statement you make when you meet someone at a conference or event and want to strike up a deeper conversation.

Just as a resume helps you to get an interview, the elevator pitch opens the door to a future, more expansive conversation where you can discuss specific opportunities to collaborate.

There is an easy formula that you can use when crafting an introductory value proposition pitch.

- I am…
- My organization is…
- My organization helps who…
- With (what) results…
- How…
With that in mind, here are some important tips:
1. Make your pitch relevant to audience
2. Be concrete (numbers, places)
3. Emphasize results
4. Avoid NGO jargon and acronyms
5. Be brief — less than 20 seconds

Break into groups of two and take turns practicing your elevator pitch to a potential partner.
What are the components of a successful pitch?

A successful pitch is...

- Compelling
- Concise
- Actionable
# Types of Partnerships

The two types of pitches that you should be prepared with:

<table>
<thead>
<tr>
<th>Soliciting a New Partnership</th>
<th>Expanding an Existing Partnership</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Questions that the pitch should answer:</strong></td>
<td><strong>Questions that the pitch should answer:</strong></td>
</tr>
<tr>
<td>• What is the issue and why is a partnership the best approach for addressing this issue?</td>
<td>• What are the successes of the existing partnership?</td>
</tr>
<tr>
<td>• What is your vision for the partnership?</td>
<td>• What would the evolved partnership look like?</td>
</tr>
<tr>
<td>• Why is now the best time to tackle this issue?</td>
<td>• Why would the organization want to move beyond a philanthropic relationship model?</td>
</tr>
<tr>
<td>• How do your partnership goals align with the potential partner’s goals?</td>
<td>• How does this allow both organizations to achieve greater development outcomes?</td>
</tr>
<tr>
<td>• What is the mutual value for you and your potential partner?</td>
<td>• What would be the increased benefit(s) to each partner?</td>
</tr>
<tr>
<td>• What are the funding and resource “asks” of your potential partner?</td>
<td>• What would be the shared value of the expanded partnership?</td>
</tr>
<tr>
<td>• Are other partners needed to make the partnership a reality?</td>
<td></td>
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<tr>
<td>• What are potential next steps?</td>
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</tbody>
</table>
Making Initial Contact
(1.5 hours)
Activity – Making Initial Contact

Let’s use the next 20 min preparing for an initial meeting with a prospective partner you know very well – split up into 2 groups and outline your approach.

At the end of those 20 minutes you will get up in front of the group to walk us through your outline / presentation and explain your rationale.

Timing:
20 minutes
Preparing for a Meeting

Making initial contact is one of the most critical stages of developing a partnership. Ensuring that we are prepared is of the utmost importance. Connecting with the other party early is a key to success.

Audience:

• Who is the company? What do they do? What is their core business? What are their top 3 market segments / geographies?
• What are the challenges, opportunities, and strategy for the organization? What are the biggest threats this company / industry are facing?
• How successful are their current social responsibility programs? How is success defined?
• What is the role of the social responsibility group? What are their existing programs, and what are they focused on?

Meeting Objective:

• What is the long-term objective with this partner?
• What is the short-term objective? What do we want to accomplish in the first meeting? What is success?
• What questions do you have for the partner, how will you pose them?
• What next steps might you suggest to the company at the end of the meeting?
• What is the agenda / critical (conversation) path for the meeting?
• Who else from Plan will attend, what roles will each of them play?
Preparing for a Meeting

Making initial contact is one of the most critical stages of developing a partnership. Ensuring that we are prepared is of the utmost importance. Connecting with the other party early is a key to success.

Expectation:

• What does the company expect to get out of the meeting? What do you think the company will ask you?

‘Win Themes’:

• What are the high level benefits or features we want to emphasize (e.g., low risk, innovation, proven solutions)? What does your audience care about the most?

Key Insights to Impress:

• What are some interesting facts or insights you want to share with the audience?
• How can you ‘WOW’ them? What can you say to build credibility and trust?
• How can you show them you understand their needs and the youth employment sector?

Based on this information, you can then construct an agenda and develop materials to meet your meeting objectives.
Setting Meeting Objectives

When moving from an idea to an opportunity, our aim should be to...

**Aim:** e.g. Understand the Partner’s priorities and identify opportunities for collaboration with Plan

**Output:** e.g. Information required to develop a proposal for Plan to support the Partner

**Sample Agenda:**
- Welcome and Meeting Objectives
- Getting to Know Eachother
- Discussion Topics

**PROPOSAL OUTLINE**

Clarifying the Need
- Situation
- Challenge / Desired Outcome
- Focus Areas & Key Question

Designing A Response (approach)
- Hypothesis
- Approach
- Key Activities
- Timeline
- Outputs
- Team/Stakeholders

Taking Action
- Costs/Commitment
- Next Steps

Credentials
Activity – Making Initial Contact

Based on the structure we shared, use the next 30 min to conduct quick research on the partner, and make updates to the meeting outline and approach that you created in the first exercise.
Tying it All Together: Telling a Story for Your Audience
Communication is Everything

“Communication is everything!”

Your good analyses and conclusions are worth NOTHING if you cannot communicate them in a clear, compelling and convincing way.

“There is no point in being right if no one understands you”

Cassandra
Being concise isn’t enough, taglines have to tell a compelling story that engages the audience.

Taglines taken in sequence should form a coherent, meaningful narrative that drives to the main message.

Storyboards can help to structure your main message and taglines:

- ONE main message or tagline per page
- Taglines read seamlessly together tell the whole story
- Structure of story is linked to pyramid
The type of audience defines how taglines must tell the story

**Skeptical audiences need to hear a different kind of story**

**Skeptical Audiences**
- Inclined to resist the main message
- Start with findings and proceed by clear inferences to the main message

**Receptive Audiences**
- Friendly to the main message
- Start with main message and use key messages and evidence to substantiate it
Closing
(30 Min)
What have you learned?

- Partnership experiences and lessons learned
- Insight into the private sector perspective
- Approaches for identifying potential partners
- How to manage your pipeline and prioritize opportunities
- Activities involved in developing a partnership opportunity
- A framework to prepare for partnership pitches
- An understanding of how to move forward after initial contact

What did we miss? What questions do you have?