



# PRODUCTIVITY WORKSHOP

September 29 – October 2, 2024  
Henderson Beach Resort  
Destin, Florida

## Sunday, September 29, 2024

7:30 AM – 8:30 AM **Breakfast**

8:30 AM – 8:45 AM **Welcome, Opening Remarks**  
**Jake Lyons, CFRE, CNP** | *President & CEO* | PRIDE Philanthropy

8:45 AM – 9:45 AM **Making Your Minutes Count**  
In the fast-paced world of fundraising, every minute counts. Yet, amidst the myriads of tasks and responsibilities, it's easy for major gift work to get lost in the shuffle. In this session, we walk through a simple exercise to effectively prioritize our *most important work* amidst competing demands. We will share strategies from seasoned fundraising managers to prioritize major gift cultivation, solicitation, and stewardship before other duties as assigned.  
**Jena McKinzie, MS, CNP** | *Executive Director of Client Relations* | PRIDE Philanthropy

9:45 AM – 10:00 AM **Break**

10:00 AM – 10:45 AM **Technology and Automation – Don't Waste Time Doing Things a Computer Can Do**  
There are seemingly infinite tools we can use to improve our productivity, but given the volume of options, we can waste just as much time finding and trying them as they save us in the long run. In this session, we will share our best automation and technology tools that actually save time, and that our team uses to improve productivity every day. Earning back valuable hours can mean a huge revenue boost for our missions!  
**Jake Lyons, CFRE, CNP** | *President and CEO* | PRIDE Philanthropy

10:45 AM – 11:45 AM **Securing the 'Sit-Down' – Mastering the Art of Setting the Donor Appointment**  
Dive into the art of setting up successful meetings with prospective donors! We will guide you through each step of the process—from timing your outreach to crafting your message. Learn how to make a compelling initial contact, communicate effectively to set expectations, and finally secure that crucial meeting. With the tools and techniques needed to confidently approach potential donors, you'll be sure to increase the number of appointments you secure and boost your fundraising success!  
**Marti Barrow, CFRE** | *Senior Vice President* | PRIDE Philanthropy

11:45 AM – 1:15 PM **Lunch**

1:15 PM – 2:00 PM

### Resource Optimization – Working on a Shoestring Budget

Limited resources can often feel like a barrier to achieving ambitious goals. However, with creativity and strategic thinking, even the smallest operating budgets can yield significant results. Attendees will learn practical tips and innovative approaches for stretching limited resources from leveraging low-cost marketing channels to creative stewardship tactics. This session offers actionable tips for those looking to make the most out of every dollar spent.

**Jena McKinzie, MS, CNP** | Executive Director of Client Relations | PRIDE Philanthropy

2:00 PM – 2:15 PM

### Break

2:15 PM – 3:00 PM

### Efficiency in Communication – Communication and Stories

Storytelling is one of the most effective tools at our disposal in nonprofit fundraising. While humans inherently know the importance of storytelling, the question remains: *What makes a good story?* Discover the power of storytelling as we delve into the art AND science of crafting compelling narratives for your nonprofit. Drawing inspiration from successful communicators like comedians, politicians, and business leaders, you'll learn how to create stories that resonate and motivate donors. This session will equip you with the tools to transform anecdotes into assets, turning your organization's stories into fundraising superpowers.

**Jared Lyons** | Executive Director of Client Services | PRIDE Philanthropy

3:00 PM – 3:45 PM

### Guest Speaker – Information Coming Soon

Guest speaker information coming soon!

4:00 PM

### Adjourn

