

Community Targeting

Passion for Planting

Compassion by Design

Special Thanks to...

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The Challenge

Church Planting is not for the faint of heart. From the beginning there seems to be too little time, too few people, not enough money, and so many overwhelming questions.

How do you create name recognition with little more than a dream? How do you establish visibility and presence in a community in a way that meets real needs and creates a buzz, whetting the appetite and causing people to ask for more? How do you create opportunities for partnerships and networking when armed with no existing credibility and nothing of substance to show?

Then there is the daunting challenge of building a launch team. Studies indicate that churches that launch with less than 40 adults on the team rarely grow above 200 in attendance. How will you possibly grow a team of that size?

In the midst of these questions is the critical need to understand your new community. This goes far beyond understanding who lives in your area; you need to learn what the people care about, their felt needs and what motivates them. What matters to these people who will eventually become new followers of Jesus?

So many seemingly important things to do, with so little time. You find yourself asking "if I'm planting a church to reach people, why am I spending so little time with them?"

The Opportunity

What if there was a simple process that could help prepare the planter to focus on the vital areas of name recognition, credibility, strategic relationships, community understanding, and launch team development. What if this process focused the planter on people? What if the process was designed to be accomplished by either the planter or his entire team in less than two weeks and with minimal cost? What if the process inherently helped build your launch team?

The impact of such a process to the health of your new church (and the planter) would be dramatic.

Community Targeting helps the planter take the first important step toward these goals—the establishment of a targeted list of community names and organizations! This relatively simple 5 step process helps the planter quickly identify a list of key strategic contacts. The planter can use the list to pursue relationships and / or to conduct a community needs assessment.

Community Targeting

Discovering Key Relationships

All Business & Non-profit Contacts

STEP 1: Select Target Area

Establishing a list of specific zip codes that frame the area of your relationships

STEP 2: Obtain Non-residential Lists

Creating a database that includes all businesses and non-profit organizations in those zip codes

STEP 3: Sort Key Groups

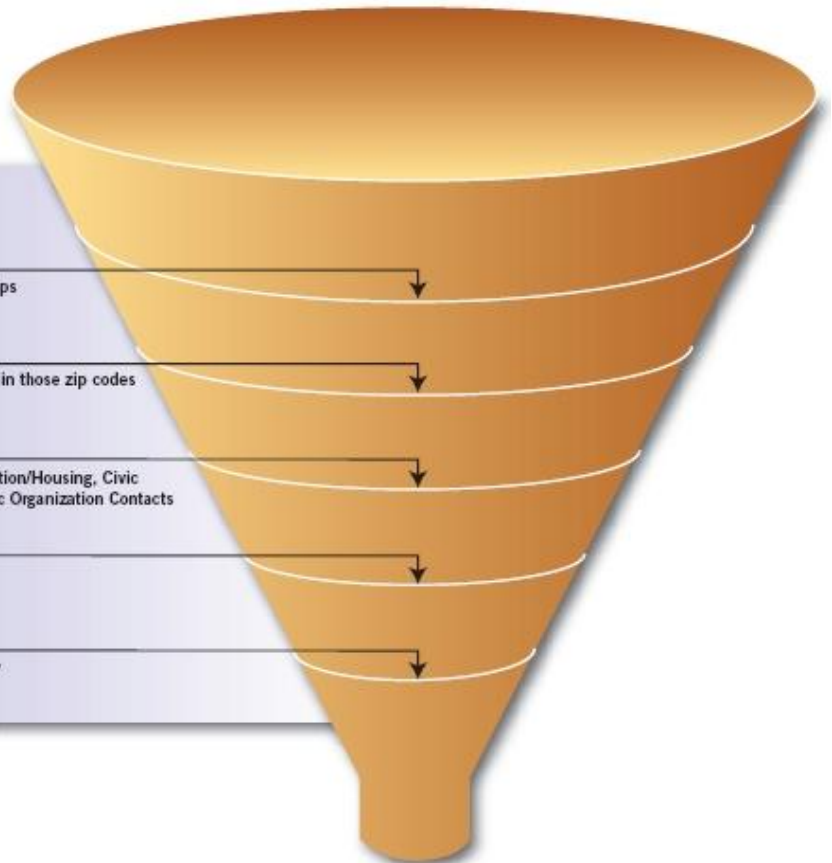
Sorting & Prioritizing Big Business, Non-Profit, Schools & Kid, Home Association/Housing, Civic Organization and Public Service, News & Media, Community Minded/Strategic Organization Contacts

STEP 4: Prioritize and Narrow

Identifying Key Relationships

STEP 5: Pursue Relationships

Building personal, first-name relationships with key leaders in the community



Key Relationships

Overview of the Community Targeting Process

- 1** Select Target Area. The 5 step Community Targeting Process starts by selecting a target geographic area. The product of this step is a list of zip codes within your target area
- 2** Obtain Non Residential Lists. The second step results in a list of all business and non-profit organizations in your selected target area.
- 3** Sort Key Groups. The third step applies a series of “lenses” or filters to prioritize and focus the lists obtained in step 2 into one of seven distinct categories: big businesses, non-profits, schools, housing, civic organizations and public servants, news and media outlets, and other strategic organizations. Consider the role of an ophthalmologist; the eye doctor provides a unique set of lens combinations while asking, “Better, or worse? Better or worse?” Eventually he defines a clear prescription for vision. In a similar way, the lenses applied in step 3 narrow the focus and define with greater clarity the most strategic contacts within the community.
- 4** Prioritize and Narrow. The fourth step narrows the list to the most strategic key relationships. Each member of the church planting team may develop a unique list of key relationships based on their specific area of specialty. The church planter’s list may be populated by business and community leaders; the children’s minister’s list may include day care operators and elementary school personnel; a student minister’s list may include high school personnel as well as sports and entertainment contacts. The final result yields from 50 to 500 key strategic contacts (specific number is at the discretion of the planter) .
- 5** Pursue Relationships. Pursuing and developing key relationships is the fifth and final step. Two different options are presented; both have an ultimate goal of building a first-name relationship with key influence leaders in the community.

The result? A healthier new church resulting from a better understanding of the people who live in the community, strategic relationships that multiply the impact and effectiveness of the new church, and a healthier church that reaches more lost people for Jesus more quickly!

Checklist of Actions

1

- Select Target Area
 - Select Zip Codes in Target Area
-

2

- Obtain Business List
 - Import and Validate Business List
 - Obtain Non-Profit List
 - Import and Validate Non-Profit List
 - Create Working File with 10 Worksheets
 - Create Master Business List in Working File
 - Create Master Non-Profit List in Working File
-

3

- Create Big Business Worksheet in Working File
- Sort Big Business Worksheet by Sales Volume and Number of Employees
- Apply the Big Business Lens
- Copy Big Business Contacts to Key Relationship Worksheet
- Update Master Business List Worksheet
- Create Non-Profit Worksheet
- Sort Non-Profit Worksheet by Annual Income and Total Assets
- Apply the Non-Profit Lens
- Copy Non-Profit Contacts to Key Relationship Worksheet
- Create School and Kid Worksheet
- Apply School and Kid Lens
- Copy School and Kid Contacts to Key Relationship Worksheet

Update Master Business List Worksheet

Create Home Association / Housing Worksheet

Apply Housing Lens

Copy Housing Contacts to Key Relationship Worksheet

Update Master Business List Worksheet

Create Civic and Public Service Worksheet

Apply Civic and Public Service Lens

Copy Civic and Public Service Contacts to Key Relationship Worksheet

Update Master Business List Worksheet

Create News and Media Worksheet

Apply News and Media Lens

Copy News and Media Contacts to Key Relationship Worksheet

Update Master Business List Worksheet

Create Community Minded / Strategic Worksheet

Apply Community Minded / Strategic Lens

Copy Community Minded / Strategic Contacts to Key Relationship Worksheet

Update Master Business List Worksheet

4

Apply Key Relationship Lens

Add Missing Contact Information

5

Decide Whether to Conduct Community Needs Assessment

Plan for Meeting with Key Contacts

Meet with Key Contacts

Follow-up with Key Contacts

Community Targeting

Discovering Key Relationships

All Business & Non-profit Contacts

STEP 1: Select Target Area

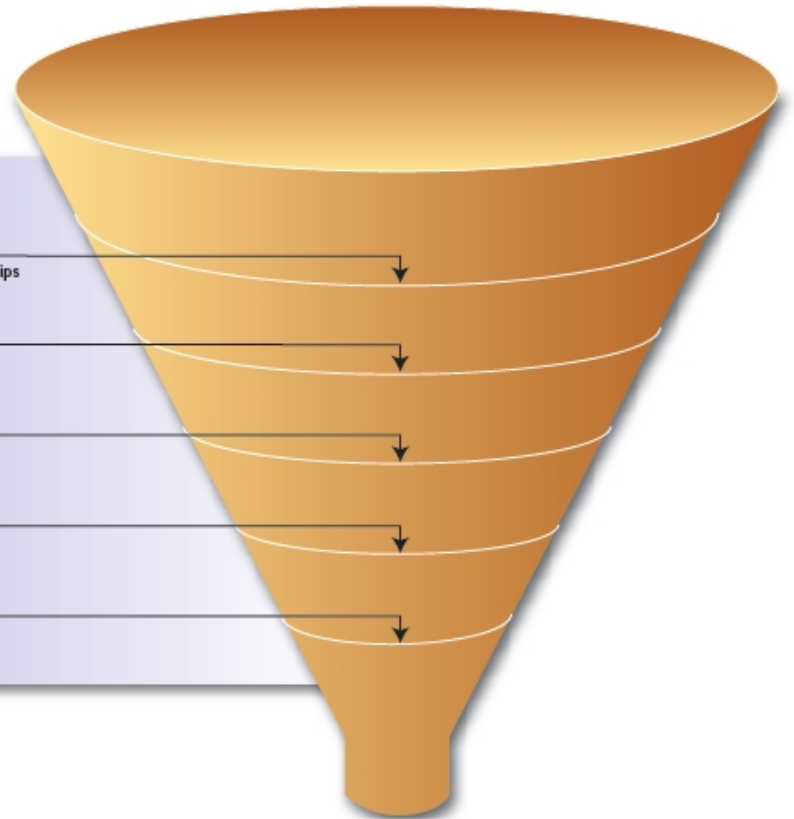
Establishing a list of specific zip codes that frame the area of your relationships

STEP 2: Obtain Non-residential Lists

STEP 3: Sort Key Groups

STEP 4: Prioritize and Narrow

STEP 5: Pursue Relationships



Key Relationships

1 STEP 1 – Select Target Area

Goal: To define the specific target area that you will serve.

Product: A list of the specific zip codes within the geographic area you seek to build strategic relationships within.

Overview: The team determines the geographic area where they desire to reach people and to build relationships. Once the area is defined, the specific zip codes that make up the area are identified.

Key Decisions:

- Decide whether to expand geographic boundaries beyond the area where the people you seek to reach live in order to include the key businesses and non -profits that are serving these people
- Select the geographic boundary (and associated zip codes) for inclusion in the Community Targeting Process

Cost: Free

Time: up to 3 hours

Key Terms:

- Target Area - the geographical area where the team seeks to serve and transform lives.

Action Steps:

Step 1 begins with an assumption that the team has a general idea of the location of the communities they seek to reach and to serve.

1. Select Your Target Area

- ❑ Using a map of the area, plot the locations of major organizations visited by your target community (e.g. movie theatres, health clubs, Wal-Mart, Target, Best Buy, wholesale clubs, Home Depot, grocery stores, etc.). Often these organizations are clustered in specific strategic locations. After plotting them on a map, draw boundaries around these clusters. The boundaries are selected based on the distance people travel to the major organizations. For example, in a given area, people will typically travel to the nearest movie theatre, health club, or major store. Define boundaries consistent with these commuting patterns.
- ❑ Talk with friends, community leaders, local real estate agents, and churches to research key facts about the area. For instance:
 - Who employs the people?
 - Where are these employers located compared with where people live?
 - Where are the major and / or preferred businesses and other service providers located compared with where people live (i.e. grocery stores, pharmacies, health clubs, major companies, malls, movie theaters, etc.)
 - What are the growth patterns and where is growth expected to be greatest?
 - What are the commuter patterns?
- ❑ Obtain free demographic information to understand the people living within your area. See <http://www.newchurches.com/free-demographic-reports> for a free demographic report.
- ❑ Review zoning and census maps to identify the neighborhood boundaries, densities and other features to help to define the appropriate area.
- ❑ Often the businesses and organizations that provide services to a specific community are located miles from the community. Decide whether to expand your geographical area to include organizations outside the area where your target demographic lives.

- ❑ Define the geographical area where you will focus your efforts. This area usually includes at least a 3-5 mile radius in a typical suburban area and even greater in rural area. Error on the side of selecting a larger area than you think you may end up serving. Selection of a geographical area is based on consideration of all the variables listed above.

2. Identify Zip Codes

- ❑ Find a tool for identifying zip codes in a given geographic area. A number of online tools are available for doing this. Do a Google search on zip code tools to find a zip code identifier tool or use Melissa Data (www.melissadata.com). Melissa data has an entire section of free resources under the heading "Lookups." After clicking on "Lookups", the user is given a list of zip code options. Look for the zip code by radius, by city, or by county tools. Follow the onscreen instructions to determine zip codes. Use the "zip code maps" feature to see the zip codes on a map.
- ❑ Using one of the zip code tools above, determine the zip codes within your geographic area of interest.

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Discovering Key Relationships

All Business & Non-profit Contacts

STEP 1: Select Target Area

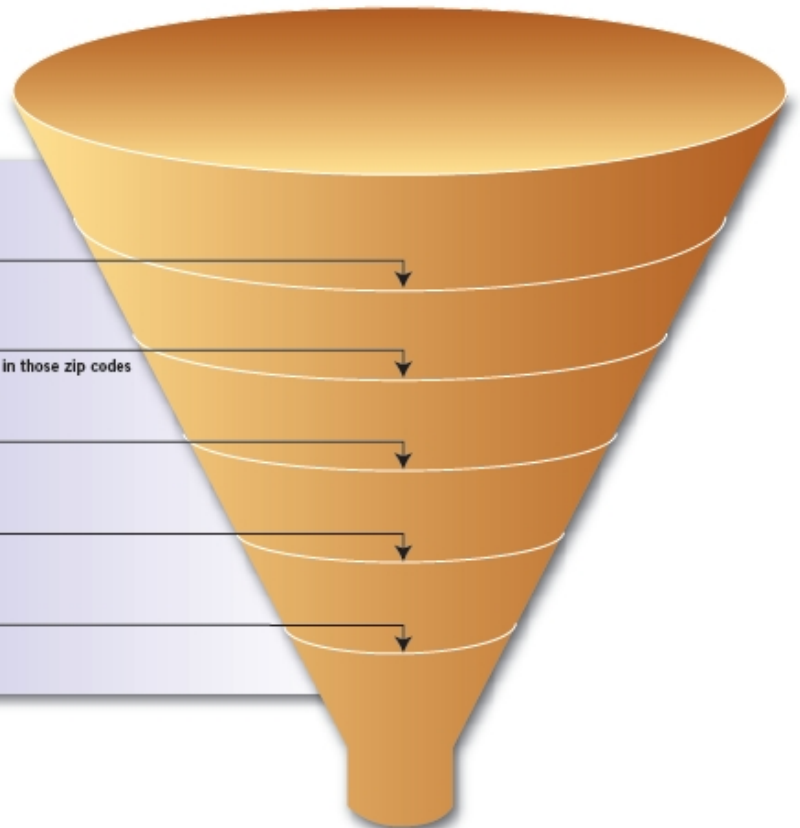
STEP 2: Obtain Non-residential Lists

Creating a database that includes all businesses and non-profit organizations in those zip codes

STEP 3: Sort Key Groups

STEP 4: Prioritize and Narrow

STEP 5: Pursue Relationships



Key Relationships

2

STEP 2 - Obtain Non-residential Lists

Goal: To establish a database of all non-residential groups within the target area defined in Step 1.

Products:

- A Master Business List that includes name, address, contact information, annual revenue, and number of employees for all businesses within your defined target area.
- A Master Non-profit List that includes name, zip code, assets, and income for all non-profits organizations within your defined target area.
- A Working File Spreadsheet that includes a Business Master Database and a Non-profit Master Database that includes name, address, contact information, annual revenue, and number of employees for all businesses and organizations within your defined target area.

Note: Depending on the size of the target area, the Working File Spreadsheet may contain thousands of non-residential contacts.

Overview: In this step, the team will:

- Obtain lists of all businesses and non-profits in the target area.
- Setup a Working File Spreadsheet in Excel. The file will contain all the worksheets needed to complete all the steps of the Community Targeting process.
- Import the business and non-profit lists into the Working File Spreadsheet.
- Validate the list content for accuracy.

Key Decisions:

- Select a mail list company to purchase the business list from. Do a Google search on "mail list" to find companies or use one of the companies listed below.
- Determine whether additional information beyond the name, address, contact information, annual revenue, and number of employees will be collected for each business.

Cost: Free to \$500. The cost is dependent on the mail list company, the number of contacts in the list, and the amount of information desired for each contact .

Time: 3 hours over one-week duration. The completion of this step is controlled by the time it takes to order and receive the mail list . A mail list company may take up to a week to provide the business list.

Key Terms:

- Non-residential Groups – any groups defined by parameters other than residence, race, age, or ethnicity. Typically this includes all businesses and non-profit organizations.
- Business List – the source list purchased from a Mail List Company that includes every business found within the chosen parameters by you the purchaser. This is the broadest list used in the project.
- Business Master Database – a copy of the Business List in a worksheet in the Working File. This master database is the starting point for many of the Step 3 sorts.
- Non-profit List - the source list obtained from Melissa Data (or similar company) that includes every non-profit company or corporation with the chosen parameters.
- Non-profit Master Database – a copy of the Non-profit List in a worksheet in the Working File. This master database is the starting point for the Step 3 non-profit sort.
- Working Files – the Excel spreadsheet that includes multiple tabs (Business Master Database, Non-profit Master Database, and seven specific sortings of the list) resulting in a listing of the key relationships
- Mail List Company – a vendor who can supply raw information about all businesses within a specific geographical area
- Comma-delimited File Format – a type of data format in which each piece of data is separated by a comma

Mail List Companies

- Church Marketing Solutions – 866-342-5264, www.church-marketing.com
- AccuData - 800-732-3440, www.acculeads.com
- InfoUSA - 800-321-0869, www.infousa.com
- Direct Marketing Association - To view their member-based Vendors/List Brokers, go to www.thedirectmarketingsearch.com. From their "List Services" category, select "Business List Brokers". You'll get a list of over 75 sources.

Action Steps:

Part 1

1. Obtain the Business List

- ❑ Determine whether information beyond company name, address, telephone number, business description, number of employees and sales volume is needed (most teams will not need additional information) . Additional information available from most companies includes fax number, year founded, minority owned indicator, owner ethnicity, owner gender, primary business type, facility size, own versus rent, and website address.
- ❑ Order the business list for the zip codes listed in Step 1. For your convenience, an order form for Church Marketing Solutions is provided at www.church-marketing.com. For additional mail list companies, see the list provided above.

2. Import and Validate the Business List

- ❑ Most mail list companies provide lists in a format that is easily imported into a Microsoft Excel Spreadsheet. After receiving the list electronically from the mail list company, import the list into an Excel Spreadsheet.
- ❑ After importing the file into an Excel Spreadsheet, review the file contents to ensure that all the requested variables (e.g. name, address, telephone, etc.) are included. Contact your list provider if you have any concerns about the data.
- ❑ Conduct a quick and simple validation of your list. Look for familiar business names to ensure they are included (i.e. your favorite restaurant, doctor's office, kid's school, realtor, plumber, landscaper, or any other business you are familiar with). If you are new to the area you may want to enlist the help of others to complete this task. Do not be concerned if one or two organizations are missing. However, if more than a few established organizations are missing from the list, contact your list provider. This is not a comprehensive check but rather a "kick the tires" check to make sure the requested information was provided and that the list includes organizations from the selected zip codes.
- ❑ Insert 3 additional columns to your spreadsheet. These column headings are "Ranking", "Assets" and "Income". NOTE: these are columns that will be used in subsequent steps when importing the non -profit list. The "Ranking" column should be the first one in the spreadsheet.
- ❑ Save a back-up copy of the list before making any changes to the information. This is your Master Business List.

Part 2

1. Obtain Non-Profit List

- ❑ Go to www.melissadata.com. Search for and click on the “lookups” link. (Occasionally Melissa Data may change the location of the links on their site.)
- ❑ Search for and click on the “Non-profit organizations” link.
- ❑ Enter your chosen zip codes (one at a time) and hit enter. The screen will show all Non-profits within the zip code entered. Save data for each zip code as a separate file by:
 - Highlight the information in the table (i.e. non -profit name, IRS code, assets and income)
 - Right click on your mouse and chose “Copy”
 - “Paste” the information into an Excel Spreadsheet
 - Repeat this process for each zip code you are interested in. Paste the information into the same Excel Spreadsheet so that the result is a single spreadsheet with all the information
 - Save the spreadsheet as your Master Non-Profit List

2. Import and Validate the Non-Profit List

- ❑ After the information for all non-profits within your selected zip codes is copied into one worksheet per step 1 above, create the same column structure in the Non-Profit list as in the Business List (i.e. create the same columns in the same order in this spreadsheet as in the Business List spreadsheet).

NOTE: the non-profit and business lists will eventually be combined in the same database so it is essential that the columns are the same. Don't be concerned that a number of columns will contain no data. For example, for non-profit organizations, the variables “Sales Code” and “Employees” will have blank data. Likewise, the columns for “Assets” and “Income” will be blank in the Business List.

- ❑ Conduct a quick and simple validation of your non-profit list. Look for familiar or common non-profit organizations to ensure they are included (i.e. day care services, booster club, or any other organization you are familiar with) , as well as non profits that serve the unique needs or interests of your target group. If you are new to the area you may want to enlist the help of others to complete this task.
- ❑ Save a back-up copy of the non-profit list. This is your Master Non-profit List.

Part 3

1. Create a Consolidated Working File

- ❑ Create a new Excel spreadsheet that will become your working file for completing the Community Targeting process. The working file will contain a total of 10 individual worksheets. When you first open a new Excel spreadsheet you will see a blank worksheet. Often you will see from 3 to 5 worksheet “tabs” at the bottom of your window that let you easily jump between worksheets. You simply click the applicable worksheet tab and the selected worksheet will display. With Excel open, create a new spreadsheet by selecting “File → New”.
- ❑ The following steps create a total of 10 worksheets within your working file:

- Worksheet 1 – Master Business List - With the new spreadsheet open, find the tab at the bottom for your current blank worksheet that is open. It most likely says “Sheet 1”. Right click on the “Sheet 1” tab and select “Rename”. Change the name from “Sheet 1” to “Master Business List”.
- Worksheet 2 – Master Non-Profit List – Repeat the process above except name the sheet “Master Non-Profit List.”

NOTE: When you run out of existing sheets to change the name of (e.g. Sheet 1, Sheet 2, Sheet 3, etc), you put your cursor over an existing tab, right click and select Insert. A new worksheet tab will be inserted. You can then change its name as explained above. To switch the order of the worksheet tabs, simply left click on a tab. While holding the mouse cursor down, simply move the tab to where you want it.

- Worksheet 3 – Big Business List – Repeat the process above except name the sheet “Big Businesses”.
- Worksheet 4 – Non-Profits – Repeat the process above except name the sheet “Non-Profits”.
- Worksheet 5 – Schools & Kids – Repeat the process above except name the sheet “Schools & Kids”.
- Worksheet 6 – Housing – Repeat the process above except name the sheet “Housing”.
- Worksheet 7 – Civic – Repeat the process above except name the sheet “Civic”.
- Worksheet 8 – News & Media – Repeat the process above except name the sheet “News & Media”.

- Worksheet 9 – Strategic – Repeat the process above except name the sheet “Strategic”.
 - Worksheet 10 – Key Relationships - Repeat the process above except name the sheet “Key Relationships”.
- Save the working file by selecting File → Save As. Then give the file a name.

2. Create the Master Business List in the Working File

- Open the Master Business List (the one that is a separate file from your working file).
- Sort the entire Master Business List by category. This can be done by placing the cursor on the upper left cell between the A and 1 to highlight the entire worksheet. With the worksheet highlighted, select “Data → Sort” from the main menu. When prompted for “Sort by”, select the column that contains the “category” assignments.

NOTE: You are sorting the spreadsheet by category so that all organizations in the same categories will be grouped together in your worksheet. This will make the following steps much quicker.

- Scan down through your worksheet looking for categories that you are not interested in and that can be eliminated. For example, you may not be interested in categories such as adult entertainment, casinos, astrologers, beer brokers, bars, escort services, nudist clubs, exotic dancers, firearms stores, wineries, etc.
- Note: for purposes of needs assessment and understanding the culture of the community, large numbers or unique clusters of these otherwise unrelated businesses can be informative as you seek to understand values and challenges in the community.
- To eliminate categories, simply highlight the rows containing the categories to be deleted. With the rows highlighted, right click and select “Delete.”
- Click on the upper left cell between the A and 1 in the Master Business File to highlight the entire worksheet. Right click and select “Copy”.
- Open the Working File (the Master Business List worksheet should be selected in the working file). Put your cursor in the A1 cell of the Master Business List worksheet in the Working File. Right click and select “Paste.” The Master Business List should now be copied into the Master Business List worksheet in the Working File. From here forward, this worksheet in your Working File will serve as your Master Business List.
- Save the working file by selecting File → Save.

3. Create the Master Non-Profit List in Working File

- ❑ Open the Master Non-profit List (separate file from your Working File).
- ❑ Click on the upper left cell between the A and 1 in the Master Non -Profit List to highlight the entire worksheet. Right click and select "Copy".
- ❑ Open the Working File (the Master Non-Profit List worksheet should be selected in the working file). Put your cursor in the A1 cell of the Master Non -Profit List worksheet in the Working File. Right click and select "Paste." The Master Non -Profit List should now be copied into the Master Non -Profit List worksheet in the Working File. From here forward, this worksheet in your Working File will serve as your Master Non-Profit List.
- ❑ Select File → Save to save this information in the Working File.

At this point in the process, you've now created 2 of the 10 worksheets in your Working File (the Master Business List and the Master Non -Profit List). These 2 worksheets will now be used in the next step (Step 3) to populate the next 7 worksheets in your working file. Each of these 7 additional worksheets represents different "sorts" that will be conducted as part of the next step (Step 3). The results of these 7 sorts are used to produce a list of Key Relationships that will be copied into the Key Relationship worksheet (the 10th and final worksheet in your working file).

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Discovering Key Relationships

All Business & Non-profit Contacts

STEP 1: Select Target Area

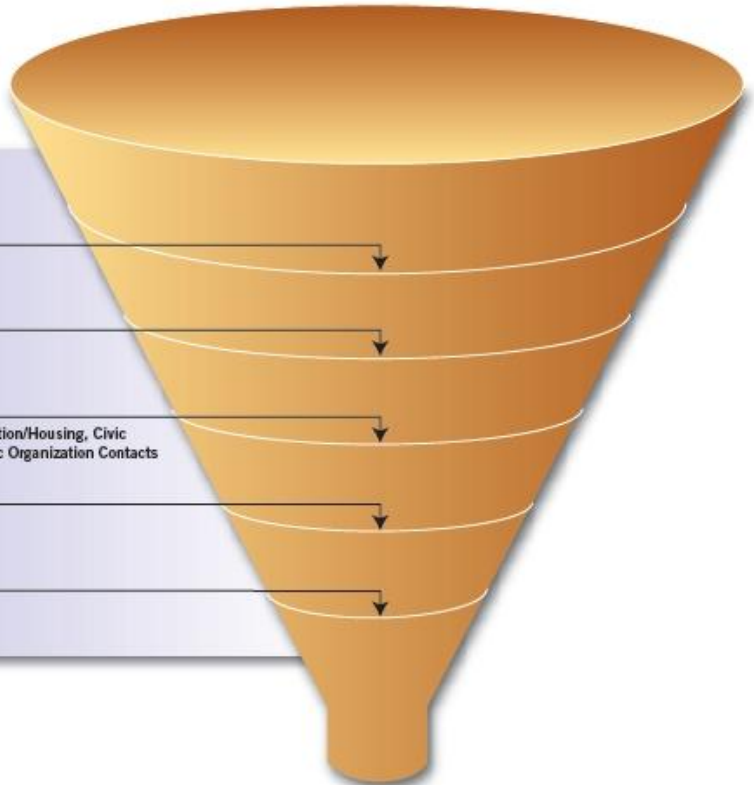
STEP 2: Obtain Non-residential Lists

STEP 3: Sort Key Groups

Sorting & Prioritizing Big Business, Non-Profit, Schools & Kid, Home Association/Housing, Civic Organization and Public Service, News & Media, Community Minded/Strategic Organization Contacts

STEP 4: Prioritize and Narrow

STEP 5: Pursue Relationships



Key Relationships



Step 3 – Sort Key Groups

Goals:

- To identify key community contacts in each of the following 7 categories and to create an initial Key Relationship worksheet
 - Big Businesses
 - Non-profits
 - Schools & Kids
 - Home Associations/Housing
 - Civic Organizations and Public Services
 - News & Media
 - Community Minded/Strategic Organizations

Products:

- Completed worksheets in the Working File for each of the 7 categories listed above
- A prioritized listing of the most strategic contacts for each of the 7 worksheets using the 1, 2, 3 rating system described below
- An initial Key Relationship Worksheet populated with the most strategic key relationships

Overview:

- The Master Business List worksheet and the Master Non-Profit List worksheet are used to populate the worksheets for the 7 sort categories. These lists are copied into the applicable category worksheet.
- Categories with no applicability to a given worksheet are deleted so that the only categories remaining in each worksheet are those of relevance to the selected sort.
- The seven sort categories are each prioritized using a 1, 2, 3 rating to identify the most strategic relationships in each sort category. In defining your team's 1, 2, 3 rating scale, a specific "lens" is defined for each sort. It is through this lens, that the 1, 2, 3 rating is applied (much like an eye doctor adjusting lenses to get the most clear picture).
- The most strategic relationships (those given a 1 rating) are copied to the Key Relationship Worksheet.

Key Decisions:

- Select criteria (lenses) for prioritizing each sort.
- Apply the selected lenses to each sort category to identify the most strategic relationships for inclusion in the Key Relationship Worksheet.

Cost: Free

Time: Up to 20 hours total for completion of the 7 sorts.

Key Terms:

- “Sort Categories” – seven key groups that are used to refine the Master Business List and Master Non-profit List. The Key Relationship Worksheet is developed from these sort categories.
- Key Relationship Worksheet – a worksheet in the Working File that is the product of taking the most strategic relationships identified in each of the 7 sort categories. The performing team determines how many contacts to include in this prioritized listing.
- Lens – A lens is a specific filter through which the team looks at the lists. For example, a team that values the performing arts and seeks to become known for their creativity would define a lens that places increased priority / importance on contacts directly involved in the creative arts.
- Prioritized Listing of Contacts – In each Sort Category, a contact will be assigned a ranking of 1, 2, or 3 based on the specific lens that is chosen. The prioritized listing is defined as:
 - Priority #1 = the most strategic key relationships that you desire to place the greatest attention on establishing relationships with because of their capacity to positively influence your organization. You are relatively confident about the positive impact these organizations could have on your organization if a solid relationship were established.
 - Priority #2 = have the potential to have positive impact on your organization but you are either uncertain of the significance or you feel the timing is not yet right to pursue these organizations (given your limited time). These groups essentially become your “waiting list” for future pursuit.
 - Priority #3 = the least strategic key relationships. These are the people/groups that it would not be good stewardship of your time to meet with because of the unlikelihood that they will positively influence your organization and its mission.

Here is another way to look at the 1, 2, 3 rating system. Assume you have an important engagement scheduled. It's been on your calendar for months, you've been talking about it and you are really looking forward to it. The day before the engagement, you receive a call from an organization on either your Master Business List or Master Non-profit List. The Director of the organization wants to meet with you, but can only meet with you at the same time of your previously scheduled engagement. You have the flexibility to skip the previously scheduled

engagement without dishonoring anyone or breaking a promise, but you've really been looking forward to it.

Discerning a 1, 2 or 3 priority ranking is relatively simple. Would you change your previously scheduled plans and in order to meet with the Director?

- If your answer is "Yes, I would enthusiastically do whatever I had to in order to meet with that person. It's a HUGE opportunity" then give the organization a priority 1 ranking.
- If you say "Ugh, that would be poor stewardship of my time. No way would I want to change my plans for that meeting" you should rate the organization a 3.
- If you wrestle with the decision or you say "I'd like to connect with them if convenient, but I don't know that it is important enough to change my plans" then you should give them a ranking of 2.

One Other Perspective on Ranking: Since your purpose is to build an organization that most quickly connects to a targeted group of people, and becomes an organization that is trusted and credible to them, Ask yourself, " how important is this organization or community entity to the people that I want to touch? And "how often do they have some contact with this organization?" These questions can help you rank the organizations with your target group in mind.

Although these are not scientific approaches, it helps you put focus on identifying the most important / strategic opportunities.



STEP 3 - Sort Key Groups

Part 1 – Big Business Sort

Goals:

- Identify the largest businesses in your target area as measured by gross sales revenue and number of employees

Products:

- A list of the largest businesses in your target area sorted by gross sales revenue and number of employees
- The most strategic businesses to target (those given a rating of 1) are included in the Key Relationship Worksheet

Overview:

- Copy the Master Business List from the Master Business List Worksheet into the Big Business List worksheet.
- Sort the Big Business List by gross revenue (primary sort) and number of employees (secondary sort). This results in a list of businesses sorted from largest business to smallest business.
- Apply your Big Business Lens to assign 1, 2 or 3 rankings to the top Big Businesses.
- Copy the Big Businesses with 1 rankings to the Key Relationship Worksheet (most likely several hundred businesses)

Key Decisions:

- Determine the specific lens to apply to this Big Business Sort
- Determine how many Big Businesses to apply the lens / ranking to (you will probably only apply the lens to the top 400 to 500 businesses and not your entire list which could include thousands of businesses).
- Determine what ranking to assign (1, 2 or 3) to each Big Business

Cost: Free

Time: 1 to 3 hours

Key Terms:

- Big Business – The largest businesses in your target area as measured by gross sales revenue and number of employees. It is reasonable to assume that the organizations with the most sales volume and the most employees are the largest.

Action Steps:

1. Create the Big Business Worksheet

- Open the Master Business List worksheet.
- Click on the upper left cell between the A and 1 to highlight the entire worksheet. Right click and select "Copy".
- Open the Big Business List worksheet. Put your cursor in the A1 cell. Right click and select "Paste." The Master Business List should now be copied into the Big Business List worksheet in the Working File.
- Save the working file by selecting File → Save.

2. Sort the List by Sales Volume and Number of Employees

- Click on the upper left cell between the A and 1 to highlight the entire worksheet.
- Select "Data → Sort" from the main toolbar.
- A popup window will give you the option to "sort by", "then by", and "then by". You will select a column for each of these 3 selections. You will sort the worksheet by three key columns: 1) Sales Volume, 2) Number of Employees and 3) Business Name (alphabetically). Enter these 3 things in the 3 selection boxes respectively. Hit "ok".

3. Apply the Big Business Lens

- Decide how many businesses to apply the lens to (i.e. to assign 1, 2 and 3's to). Your Big Business List may include thousands of businesses. If so, you may choose to apply the lens / sort to only the first thousand. Decide how many businesses to apply the lens to. You are strongly encouraged to apply the lens to at least 500 businesses and ideally 1,000.
- Decide how many 1 rankings you would like to end up with that will be moved to your Key Relationship Worksheet. Consider including at least 100 to 200 businesses with 1 ranking.
- Decide what your Big Business Lens will include. It may be as simply as the largest businesses as measured by gross sales volume and number of employees. If so, you simply assign 1 rankings to the top businesses on the list (i.e. if you decided you wanted to move 200 businesses to your Key Relationship Worksheet, then assign the top 200 businesses on the list a ranking of 1). Other lens' could include targeting specific types of businesses such as technology or consulting firms (e.g. if you are trying to reach white collar workers) or manufacturing firms (e.g. if you are trying to reach blue collar workers). Your specific lens should be based on your current

understanding of who you are seeking to serve and the likelihood that a given type of business will give you direct or indirect access to the your target. Other factors to consider in defining your lens include:

- Impact – Are there big businesses that have a significant impact on community development or values? If so, assign a priority listing of “1”
- Relevance- Are there big businesses that employ or serve people you are seeking to reach? If they fit the type of employer your target groups works for, or actually are employed there in significant numbers, rank this a “1”
- Partnership Opportunities – Are there big businesses that provide intentional opportunities for partnerships in the community (this information may be gathered by websites or interviews)? If so, assign a priority listing of “1”.
- Leadership – Are there big businesses that provide key leadership in some aspect of the community? If so, assign a priority listing of “1”.
- Vision and Values – Are there big businesses that closely align to the vision and values of your team? If so, assign a priority listing of “1”. Example – a theatrical supply factory may be low on the list for sales volume but high on your commitment to theatrical and creative arts.
- Assign a ranking to each of the businesses on your list (or to the number you’ve decided to assign rankings to).
- After completing the ranking, resort the worksheet by the “ranking” column so that all the businesses ranked as a “1” are at the top.
- Hit the File / Save button to save this information in the Working File.

4. Copy the “1” Ranking Businesses to Key Relationship Worksheet

- Highlight the rows of businesses in the Big Business worksheet that have been assigned a priority listing of “1”, hit the “copy” function on the Excel toolbar, and then paste all information on those businesses in the top of the Key Relationship worksheet in the Working File.
- Hit the File / Save button to save this information in the Working File.

5. Update Master Business List Worksheet

- Delete all the businesses that were copied to the Key Relationship Worksheet from the Master Business List Worksheet
- Hit the File / Save button to save this information in the Working File.



STEP 3 - Sort Key Groups

Part 2 – Non-Profit Sort

Goals:

- Identify the non-profit organizations located in your target area that have the most strategic potential to assist your organization, connect you to your target group, and further its mission.

Products:

- A list of the most active and influential non-profits in your target area
- The most strategic non-profits to target (those given a rating of 1) are included in the Key Relationship Worksheet

Overview:

- Copy the Master Non-Profit List Worksheet into the Non-Profit List worksheet.
- Sort the Non-Profit List by annual income (primary sort) and assets (secondary sort). This results in a list of non-profits sorted from most to least active as measured by financial activity (an indicator of overall activity).
- Apply your Non-Profit Lens to assign 1, 2 or 3 rankings to the top Non-Profits.
- Copy the Non-Profits with 1 rankings to the Key Relationship Worksheet

Key Decisions:

- Determine the specific lens to apply to this Non-Profit Sort
- Determine what ranking to assign (1, 2 or 3) to each Non-Profit

Cost: Free

Time: 1 – 2 hours

Key Terms:

- Non-Profit – A non-profit organization is formed for the purpose of serving a public or mutual benefit other than the pursuit of financial profit. Non-profits are often in one of the following categories: (1) Arts, culture, humanities, (2) Education, (3) Environment, (4) Health, (5) Human services, (6) International / foreign affairs, (7) Public / societal benefit, (8) Religion, (9) Members benefits. Nonprofit organizations take many forms including charities (e.g. American Red Cross, Salvation Army, etc), foundations, sports associations, community associations, community foundations, advocacy groups, professional / trade associations and religious organizations.

Action Steps:

1. Create the Non-Profit Worksheet

- Open the Master Non-Profit List worksheet.
- Click on the upper left cell between the A and 1 to highlight the entire worksheet. Right click and select "Copy".
- Open the Non-Profit List worksheet. Put your cursor in the A1 cell. Right click and select "Paste." The Master Non-Profit List should now be copied into the Non-Profit List worksheet in the Working File.
- Save the working file by selecting File → Save.

2. Sort the List by Annual Income and Total Assets

- Click on the upper left cell between the A and 1 to highlight the entire worksheet.
- Select "Data → Sort" from the main toolbar.
- A popup window will give you the option to "sort by", "then by" and "then by". You will select a column for each of these 3 selections. You will sort the worksheet by three key columns: 1) Annual Income, 2) Total Assets and 3) Non-Profit Name (alphabetically). Enter these 3 things in the 3 selection boxes respectively. Hit "ok".

3. Apply the Non-Profit Lens

One key goal of this step is to identify the most active and influential non-profit organizations that are serving and making a difference in your target area. The core lens questions are "what is an organization doing in the community?", "how active are they?", "what impact are they having", "how well does what they do match our vision and values," and how connected are they to the people we want to reach?"

Note: At cursory glance, the name may not give away the purpose of the organization to determine a ranking. We suggest using <http://foundationcenter.org> and www.guidestar.org to lookup information on non-profits.

- Decide what your Non-Profit Lens will include. It may be as simple as the largest and most active non-profits as measured by annual income and assets. If so, you simply assign "1" rankings to the top non-profits on the list. Other lenses could include targeting non-profits that focus on families, health, or human services. Your specific lens should be based on your

current understanding of who you are seeking to serve and the likelihood that a given type of non-profit will give you direct or indirect access to the your target. Other factors to consider in defining your lens include:

- Impact – Are there non-profits that have a significant impact on community development or values? If so, assign a priority listing of “1”.
 - Partnership Opportunities – Are there non-profits that provide intentional opportunities for partnerships in the community (this information may be gathered by websites or interviews)? If so, assign a priority listing of “1”.
 - Relevance- Are there non profits that serve people you are seeking to reach? If they fit the type of service organization that your target commonly accesses, rank this a “1”
 - Leadership – Are there non-profits that provide key leadership in some aspect of the community? If so, assign a priority listing of “1”.
 - Vision and Values – Are there non-profits that closely align to the vision and values of your team? If so, assign a priority listing of “1”. Example – a volunteer run counseling center for troubled teens may be low on the list for annual income but high on your commitment to serving families.
- Survey – Conduct an initial phone survey with at least 10 different people / organizations (20 is even better) to obtain independent input on what other’s in the community consider the most active non -profits to be. Consider calling a combination of churches, schools, local business associations (e.g. Chamber of Commerce), real estate agents, local newspaper editors, banks, City or County Social Service Offices, local clinics, etc. In most cases, the secretary / administrative assistant for the organization can answer your questions (especially in churches).

Note: You can use the free download #2 from the Compassion by Design website to guide your survey. This tool has tips for surveying as well as a sample survey. This is one of the pre-needs assessments activities, and is located under “resources.”

If possible, you may want to visit several of these organizations in person. This allows you to use the Community Targeting process to establish some initial relationships.

Compile a list of non-profits that are cited as the most active. Look for organizations that are repeatedly cited as active and influential. Consider assigning these organizations a “1” or “2” ranking.

- There will be several categories of non -profit organizations on your Non-Profit Worksheet. In this step, you will eliminate organizations that appear to have limited strategic value to your organization. In assigning organizations

a ranking of "3", look for the following:

- Organizations with no financial activity as measured by annual income and assets. With the exception of churches, organizations with \$0 income and \$0 assets are often dormant or doing very little, with the exception of new organizations or associations that operate as a coordinating group for sports, neighborhood watch associations or those that sponsor other community activities (such as the non profit that only operates one annual event in the community). Assign a ranking of "3" (least potential for a key relationship) to these organizations, unless it fits the last group and it fits your target.

NOTE: Organizations with income of less than \$25,000 per year AND churches are not required to file annual forms. As a result, these organizations will be listed as "\$0" annual income. If you are interested in pursuing relationships with churches, do not enter "3" for the churches you are interested in.

- Organizations serving a very narrow target that does not align with your organization (e.g. the Association of World War II Aviators) or has very little alignment with your organization. Assign a ranking of "3" (least potential for a key relationship) to these organizations.
- Organizations with a national focus but with essentially no activity or impact in your target area (e.g. National Association of Sheet Metal Workers). Often the mailing address of a national organization is within a community where the organization has no activity. Assign a ranking of "3" (least potential for a key relationship) to these organizations.
 - i. Note: National organizations headquartered in your community, as well as national organizations with headquarters, should go into a separate pull out list that you look at later for grant opportunities. The presence of a headquarters in your community bodes well for future grants, even if unrelated to your target.

- Go through your Non-Profit Worksheet and assign a 1 or 2 to the remaining organizations using the lens above and the definitions of a "1" and "2" ranking in the section above.
- After completing the ranking, resort the worksheet by the "ranking" column so that all the non-profits ranked as a "1" are at the top.
- Hit the File / Save button to save this information in the Working File.

4. Copy the "1" Ranking Non-Profits to Key Relationship Worksheet

- Highlight the rows in the Non-Profit Worksheet that have been assigned a priority listing of "1", hit the "copy" function on the Excel toolbar, and then

paste all information on those organizations in the top of the Key Relationship worksheet in the Working File.

- Hit the File / Save button to save this information in the Working File.



STEP 3 - Sort Key Groups

Part 3 – Schools and Kids

Goals:

- Identify the most strategic relationships in the “Schools and Kid” category.

Products:

- A list of the schools and other organizations serving students / children in your target area
- The most strategic schools / day-care organizations in your target (those given a rating of 1) are included in the Key Relationship Worksheet

Overview:

- Copy the Master Business List Worksheet into the School and Kid List worksheet.
- Eliminate all organizations that are unrelated to schools and day-care facilities
- Apply your School Lens to assign 1, 2 or 3 rankings to the top schools and day-care facilities.
- Copy the schools and day-care facilities with 1 rankings to the Key Relationship Worksheet

Key Decisions:

- Determine the specific lens to apply to this School / Kid Sort
- Determine what ranking to assign (1, 2 or 3) to each School

Cost: Free

Time: 1 – 2 hours

Action Steps:

1. Create the School and Kid Worksheet

- Open the Master Business List worksheet.
- Click on the upper left cell between the A and 1 to highlight the entire worksheet. Right click and select "Copy".
- Open the School List worksheet. Put your cursor in the A1 cell. Right click and select "Paste." The Master Business List should now be copied into the School List worksheet in the Working File.
- The worksheet is already sorted by category. If not, sort the worksheet by category. Begin looking for any category that includes daycare centers, preschools, elementary schools, middle schools, junior high schools, high schools, alternative schools, vocational schools, prep schools, colleges, universities, or related categories.

See a list of suggested category descriptions that you will want to include in your sort at the end of Step 3.

- Highlight all rows containing categories unrelated to schools and kids. Delete the rows so that the only remaining organizations are schools and day-care facilities.
- <http://nces.ed.gov/globallocator> provides a comprehensive list of all schools in selected zip codes. Use the site to validate the schools in your list. If any schools are missing, add them to the School List Worksheet.
- Review the Non-profit worksheet looking for any schools and day-care centers that are not already included in your School List Worksheet. Add them to the list.
- Save the working file by selecting File → Save.

2. Apply the School and Day Care Lens

- Determine your lens. Consider the following factors:
 - Type, Visibility and Influence – What schools have the most significant impact in the community? Typically, high schools have more influence than middle schools, middle schools more influence than elementary schools, public schools more influence than private. Colleges may or may not have significant impact. In general, high schools should be ranked a "1" and middle schools at least a "2".

- Vision and values – Are there any schools that closely align to the church plant’s vision and values? An organization committed to reaching young families may find daycare centers the source of key relationships; an organization whose vision includes visual arts may find an arts “magnet” school a key relationship.
 - Geography – What schools serve the community where your organization is located?
- By using the factors above and the definitions of a 1, 2 and 3 ranking outlined at the beginning of Step 3, assign a ranking to each organization in your School List.
 - After completing the ranking, resort the worksheet by the “ranking” column so that all the schools ranked as a “1” are at the top.
 - Hit the File / Save button to save this information in the Working File.
3. Copy the “1” Ranking Schools and Kid’s Contacts to Key Relationship Worksheet
- Verify that none of the organizations with a “1” ranking are already in the Key Relationship worksheet. If they are, you do not need to copy them below (or you can copy them and then delete the duplicates from the Key Relationship Worksheet).
 - Highlight the rows in the School Worksheet that have been assigned a priority listing of “1”, hit the “copy” function on the Excel toolbar, and then paste all information on those organizations in the top of the Key Relationship worksheet in the Working File.
 - Hit the File / Save button to save this information in the Working File.
4. Update Master Business List Worksheet
- Make a list of all the categories used in the School and Kids Worksheet
 - Delete these categories from the Master Business List Worksheet
 - Hit the File / Save button to save this information in the Working File.



STEP 3 - Sort Key Groups

Part 4 – Home Associations / Housing

Goals:

- Identify the most strategic relationships within the local homeowner/condo associations and apartment complexes.

Products:

- A list of the local homeowner/condo associations and apartment complexes.
- The most strategic homeowner/condo associations and apartment complexes in your target (those given a rating of 1) are included in the Key Relationship Worksheet

Overview:

- Copy the Master Business List Worksheet into the Housing List worksheet.
- Eliminate all organizations that are unrelated to housing
- Apply your Housing Lens to assign 1, 2 or 3 rankings to the top homeowner/condo associations and apartment complexes .
- Copy the housing contacts with 1 rankings to the Key Relationship Worksheet

Key Decisions:

- Determine the specific lens to apply to this Housing Sort
- Determine what ranking to assign (1, 2 or 3) to each contact

Cost: Free

Time: 1 – 2 hours

Action Steps:

1. Create the Home Association/Housing Worksheet

- Open the Master Business List worksheet.
- Click on the upper left cell between the A and 1 to highlight the entire worksheet. Right click and select "Copy".
- Open the Housing List worksheet. Put your cursor in the A1 cell. Right click and select "Paste." The Master Business List should now be copied into the Housing List worksheet in the Working File.
- The worksheet should already be sorted by category. If not, sort it by category. Begin looking for any category that includes homeowner associations (HOA), condominium associations, apartment complexes, or related categories.

See a list of suggested category descriptions that you will want to include in your sort at the end of Step 3.

- Highlight all rows containing categories unrelated to housing. Delete the rows so that the only remaining organizations are housing related.
- Review the Non-profit worksheet looking for any Home Association / Housing organizations that are not already included in your Home Association Worksheet. Add them to the list.
- Save the working file by selecting File → Save.

2. Apply the Housing Lens

- Determine your lens. Consider the following factors:
 - Impact – What homeowner associations, condominium associations, or apartment complexes have the most significant impact in the community? Impact may be measured by volume (for example, the number of units in an HOA) or activity (an HOA may simply be a safeguard for property values, or may be a "value-added" HOA that provides activities, education, and entertainment for its members).
 - Vision and values – Are there any homeowner associations, apartment complexes, or condominium associations that closely align to the church plant's vision and values? A church plant committed to reaching senior adults may find specific housing populated entirely by seniors.

- Geography – What homeowner associations, apartment complexes, or condominium associations serve the community where the church plant will meet?
- By using the factors above and the definitions of a 1, 2 and 3 ranking outlined at the beginning of Step 3, assign a ranking to each organization in your Housing List.
 - After completing the ranking, resort the worksheet by the “ranking” column so that all the contacts ranked as a “1” are at the top.
 - Hit the File / Save button to save this information in the Working File.
3. Copy the “1” Ranking Housing Contacts to Key Relationship Worksheet
- Verify that none of the organizations with a “1” ranking are already in the Key Relationship worksheet. If they are, you do not need to copy them below (or you can copy them and then delete the duplicates from the Key Relationship Worksheet).
 - Highlight the rows in the Housing Worksheet that have been assigned a priority listing of “1”, hit the “copy” function on the Excel toolbar, and then paste all information on those organizations in the top of the Key Relationship worksheet in the Working File.
 - Hit the File / Save button to save this information in the Working File.
4. Update Master Business List Worksheet
- Make a list of all the categories used in the Housing List Worksheet
 - Delete these categories from the Master Business List Worksheet
 - Hit the File / Save button to save this information in the Working File.



STEP 3 - Sort Key Groups

Part 5 – Civic Organizations and Public Services

Goal:

- Identify the most strategic relationships within the Civic and Public Service sector in the target area.

Products:

- A list of the Civic and Public Service organizations in the target area.
- The most strategic Civic and Public Service organizations in your target (those given a rating of 1) are included in the Key Relationship Worksheet

Overview:

- Copy the Master Business List Worksheet into the Civic List worksheet.
- Eliminate all organizations that are unrelated to Civic and Public Services
- Apply your Civic Lens to assign 1, 2 or 3 rankings to the top Civic and Public Service organizations.
- Copy the Civic and Public Service contacts with 1 rankings to the Key Relationship Worksheet

Key Decisions:

- Determine the specific lens to apply to the Civic and Public Service Sort
- Determine what ranking to assign (1, 2 or 3) to each contact

Cost: Free

Time: 1 – 2 hours

Key Terms:

- Civic and Public Service Sector - The part of the economy concerned with providing basic public services. This includes but is not limited to services such as the police, fire department, ambulance, postal service, public roads, public transit, health and human services, etc. This category also includes local elected politicians.

Action Steps:

1. Create the Civic and Public Service Worksheet

- Open the Master Business List worksheet.
- Click on the upper left cell between the A and 1 to highlight the entire worksheet. Right click and select "Copy".
- Open the Civic List worksheet. Put your cursor in the A1 cell. Right click and select "Paste." The Master Business List should now be copied into the Civic List worksheet in the Working File.
- The worksheet should already be sorted by category. If not, sort it by category. Begin looking for any category that includes fire and police departments, U.S. postal service, public relations services, civil and social organizations, or related categories.

See a list of suggested category descriptions that you will want to include in your sort at the end of Step 3.

- Highlight all rows containing categories unrelated to Civic and Public Services. Delete the rows so that the only remaining organizations are Civic and Public Service related.
- Review the Non-profit worksheet looking for any Civic and Public Service organizations that are not already included in your Civic Worksheet. Add them to the list.
- Save the working file by selecting File → Save.

2. Apply the Civic Lens

- Determine your lens. Consider the following factors:
 - Impact – What civic organizations, public service organizations, or specific public servants have the most significant impact in the community? Impact may be measured by authority (mayor vs. animal control officer), media presence, or influence (a person who may not have positional authority but has significant relational authority).
 - Vision and values – What civic organizations, public service organizations, or specific public servants closely align to the church plant's vision and values? This may be a politician's political platform, the specific service work the Kiwanis or Optimists do.

- Representation – What public servants specifically represent the community where the church plant will meet?
 - Relevance- Is this a public service that has special value or frequent use by your target population?
- By using the factors above and the definitions of a 1, 2 and 3 ranking outlined at the beginning of Step 3, assign a ranking to each organization in your Civic List.
 - Verify that your local elected politicians and public servants are in the list (e.g. Mayor, Town Council members, City Clerk, Planning Commissioner, District Supervisors, School Board Representatives, etc). Consider making a comprehensive list of elected public servants. Add these contacts to your Civic List as applicable. Key elected public servants should be assigned a “1” ranking.
 - After completing the ranking, resort the worksheet by the “ranking” column so that all the contacts ranked as a “1” are at the top.
 - Hit the File / Save button to save this information in the Working File.
3. Copy the “1” Ranking Civic Organizations to Key Relationship Worksheet
- Verify that none of the organizations with a “1” ranking are already in the Key Relationship worksheet. If they are, you do not need to copy them below (or you can copy them and then delete the duplicates from the Key Relationship Worksheet).
 - Highlight the rows in the Civic Worksheet that have been assigned a priority listing of “1”, hit the “copy” function on the Excel toolbar, and then paste all information on those organizations in the top of the Key Relationship worksheet in the Working File.
 - Hit the File / Save button to save this information in the Working File.
4. Update Master Business List Worksheet
- Make a list of all the categories used in the Civic List Worksheet
 - Delete these categories from the Master Business List Worksheet
 - Hit the File / Save button to save this information in the Working File.



STEP 3 - Sort Key Groups

Part 6 – News and Media

Goal:

- Identify the most strategic relationships within the News and Media sector in the target area.

Products:

- A list of the News and Media organizations in the target area.
- The most strategic News and Media organizations in your target (those given a rating of 1) are included in the Key Relationship Worksheet

Overview:

- Copy the Master Business List Worksheet into the News & Media List worksheet.
- Eliminate all organizations that are unrelated to News & Media
- Apply your News & Media Lens to assign 1, 2 or 3 rankings to the top News & Media organizations.
- Copy the News & Media contacts with 1 rankings to the Key Relationship Worksheet

Key Decisions:

- Determine the specific lens to apply to the News & Media Sort
- Determine what ranking to assign (1, 2 or 3) to each contact

Cost: Free

Time: 1 – 2 hours

Key Terms:

- News & Media – News papers (and their editors), radio stations, local magazines, etc.

Action Steps:

1. Create the News and Media Worksheet

- Open the Master Business List worksheet.
- Click on the upper left cell between the A and 1 to highlight the entire worksheet. Right click and select "Copy".
- Open the News & Media List worksheet. Put your cursor in the A1 cell. Right click and select "Paste." The Master Business List should now be copied into the News & Media List worksheet in the Working File.
- The worksheet should already be sorted by category. If not, sort it by category. Begin looking for any category that includes radio broadcasting stations, local newspapers, major metropolitan newspapers, television film production, or related categories.

See a list of suggested category descriptions that you will want to include in your sort at the end of Step 3.

- Highlight all rows containing categories unrelated to News & Media. Delete the rows so that the only remaining organizations are News & Media related.
- Save the working file by selecting File → Save.

2. Apply the News & Media Lens

- Determine your lens. Consider the following factors:
 - Impact – What news and media outlets have the most significant impact in the community? Impact may be measured by market share, current marketing campaigns, or medium (radio, television, or print).
 - Vision and values – Are there news and media outlets that closely align to the church plant's vision and values? Which radio station is the best fit for potential key relationship – country western, sports talk, hip hop, R&B, all news, top 40, or classic rock?
 - Relevance- What media outlets are most frequently used by your target group? What media outlets line up with the tastes and interests of this group?
 - Geography – What news and media outlets serve the community where the church plant will meet?

- Specific local impact – what news and media outlets serve the specific community of the church plant? A radio station closely aligned with the local high school is a potential key relationship; the writer of a community newspaper whose “beat” is local events is a potential key relationship.
- By using the factors above and the definitions of a 1, 2 and 3 ranking outlined at the beginning of Step 3, assign a ranking to each organization in your News & Media List.
 - Locate major television broadcasting stations, local radio stations, and local newspapers using your local yellow pages and www.superpages.com. Verify that these organizations are included in the News & Media Worksheet.
NOTE: Some newspapers and radio stations will give free advertisements to churches/faith based organizations.
 - After completing the ranking, resort the worksheet by the “ranking” column so that all the contacts ranked as a “1” are at the top.
 - Hit the File / Save button to save this information in the Working File.
3. Copy the “1” Ranking News & Media Organizations to Key Relationship Worksheet
- Verify that none of the organizations with a “1” ranking are already in the Key Relationship worksheet. If they are, you do not need to copy them below (or you can copy them and then delete the duplicates from the Key Relationship Worksheet).
 - Highlight the rows in the News & Media Worksheet that have been assigned a priority listing of “1”, hit the “copy” function on the Excel toolbar, and then paste all information on those organizations in the top of the Key Relationship worksheet in the Working File.
 - Hit the File / Save button to save this information in the Working File.
4. Update Master Business List Worksheet
- Make a list of all the categories used in the News & Media List Worksheet
 - Delete these categories from the Master Business List Worksheet
 - Hit the File / Save button to save this information in the Working File.

Note: The free Download #1 on the www.compassionbydesign.org website (resource section) provides the outline for completing a review of the contents of the media that you have selected in the sort. This is a pre-needs assessment that will help bring you up to date and focus your understanding on current issues and needs.



STEP 3 - Sort Key Groups

Part 7 – Community Minded / Strategic Organizations

Goal:

- Identify other community minded and / or strategic organizations that have not already been identified from the previous sorts.

Products:

- A list of community minded and / or strategic organizations in the target area.
- The additional community minded / strategic organizations in your target (those given a rating of 1) are included in the Key Relationship Worksheet

Overview:

- Copy the Master Business List Worksheet into the Strategic List worksheet.
- Apply your Community Minded / Strategic Lens to assign 1, 2 or 3 rankings to the list of contacts.
- Copy the Community Minded / Strategic contacts with 1 rankings to the Key Relationship Worksheet

Key Decisions:

- Determine the specific lens to apply to the Community Minded / Strategic Sort
- Determine what ranking to assign (1, 2 or 3) to each contact

Cost: Free

Time: 1 hour

Key Terms:

- Community-Minded / Strategic Organizations – There are a number of organizations that are not included in the one of the previous 6 sorts but do have strategic value to your organization. For example, organizations like Wal-Mart, Chick-Fil-A, crisis prevention centers, substance abuse counseling, motion picture theaters, community/recreation centers, athletic clubs, senior citizen centers, etc. provide strategic value to most organizations. Wal-Mart and Chic-Fil-A are examples of very community minded organizations. Movie theatres and health clubs are regional facilities with good name recognition and customer bases.

Action Steps:

1. Create the Community Minded / Strategic Worksheet

- Open the Master Business List worksheet.
- Click on the upper left cell between the A and 1 to highlight the entire worksheet. Right click and select "Copy".
- Open the News & Media List worksheet. Put your cursor in the A1 cell. Right click and select "Paste." The Master Business List should now be copied into the News & Media List worksheet in the Working File.
- The worksheet is already sorted by category. Assuming you've been updating the Master Business List Worksheet at the end of each sort (as listed in the step by step instructions for each sort), the Master Business List Worksheet should now include only categories that have not been reviewed during a previous sort.
- Review the Non-profit worksheet looking for any community minded organizations that are not already included in your Community Minded / Strategic Worksheet. Add them to the list.
- Save the working file by selecting File → Save.

2. Apply the Community Minded / Strategic Organization Lens

- Determine your lens. Consider the following factors:
 - Impact – What other community minded or strategic organizations have not been included in the previous sorts are making a significant impact? This may be smaller businesses (not rated a "1" in the Big Business sort) that have a significant presence in the community through the specific service they provide or because of their brand/marketing. The local Starbucks or movie theatre may not be a high volume business financially, but may have high potential for a key relationship.
 - Vision and values – Are there other community minded or strategic organizations have not been included in the previous sorts that closely align to or are supportive of the church plant's vision and values? Examples may include Chick-fil-A, Wal-Mart, etc.
 - Specific local impact – What other community minded or strategic organizations have not been included in the previous sorts serve the local community where the church plant will meet?

- By using the factors above and the definitions of a 1, 2 and 3 ranking outlined at the beginning of Step 3, go through the list and identify ranking "1" organizations. During this sort, do not worry about ranking 2 and 3.
 - After completing the ranking, resort the worksheet by the "ranking" column so that all the contacts ranked as a "1" are at the top.
 - Hit the File / Save button to save this information in the Working File.
3. Copy the "1" Ranking Community Minded / Strategic Organizations to Key Relationship Worksheet
- Verify that none of the organizations with a "1" ranking are already in the Key Relationship worksheet. If they are, you do not need to copy them below (or you can copy them and then delete the duplicates from the Key Relationship Worksheet).
 - Highlight the rows in the Community Minded / Strategic Worksheet that have been assigned a priority listing of "1", hit the "copy" function on the Excel toolbar, and then paste all information on those organizations in the top of the Key Relationship worksheet in the Working File.
 - Hit the File / Save button to save this information in the Working File.
4. Update Master Business List Worksheet
- Delete all the organizations that were copied to the Key Relationship Worksheet from the Master Business List Worksheet
 - Hit the File / Save button to save this information in the Working File.

Sample Categories Included in Sorts

Big Business	Non-Profit	Schools and Kids
<ul style="list-style-type: none"> • Accountants • Advertising Agencies • Anesthesiologists • Auto Dealers • Bookstores • Building Maintenance • Business Consultants • Civil Engineers • Commercial/Industrial Building Operation • Computer and Software Stores • Computer Related Consulting Services • Credit Card Services • Dentist Offices • Electricians • Employment Agencies • Financial Services • Florists • Furniture Stores • Gasoline Service Station • Gift Shops • Grocery Stores • Health Practitioner Offices • Hospitals • Insurance Agencies • Internet Connectivity Services • Landscapers • Life Insurance • Mortgage Bankers, Brokers • Realtors/Appraisers • Security System Services • Travel Agencies • Video Equipment Electronics 	<ul style="list-style-type: none"> • Boys and Girls Clubs • Charitable Organizations • Community Church • Corporate Foundations • Disaster Preparedness and Relief • Environment Agencies • Family Counseling • Fire Prevention, Protection and Control • Fund Raising Organizations • Government Subsidized Housing • Homeless Shelters • Human Civic Rights • Parent/Teacher Associations • Philanthropic organizations • Youth Organizations 	<ul style="list-style-type: none"> • Child Day Care Centers • Child Related Social Services • Dance Schools • Educational Services • Elementary Schools • Group Daycare • Instruction Schools, Camps and Services • Karate Instruction Schools • Language Schools • Martial Arts Schools • Montessori • Private Elementary and Secondary Schools • Public Elementary Schools • Public Junior High Schools • Secondary Schools • Universities • Vocational Training Agencies

Sample Categories Included in Sorts

HOA and Housing	Civic Organizations and Public Service	News and Media	Strategic Organizations
<ul style="list-style-type: none"> • Apartment Building Operators • Community Associations • Condominium Association • Home Owner Associations 	<ul style="list-style-type: none"> • Civil and Social Associations • Fire Prevention, Protection and Control • Fire Protection Information Bureau • Police Protection • Public Relations Services • Regulations, Administrating of Transportation • U.S. Postal Service 	<ul style="list-style-type: none"> • Miscellaneous Publishing • Motion Picture and Video Production • Music and Broadcasting Services • Newspapers (daily and Weekly) • Public relations Agencies • Radio and Television Announcing • Radio Broadcasting Stations • Radio Producers • Television Broadcasting Stations • Television Film Production 	<ul style="list-style-type: none"> • Athletic Clubs • Bookstores • Community Centers • Crisis Intervention Centers • Detoxification Centers • Employment Agencies • Family Counseling Services • Fast-Food Restaurant Chain (i.e. Chick fil et) • Motion Picture Theaters • Picnic Ground Operation • Public Welfare Services • Recreation Centers/Services • Senior Citizen Centers • Social Service Centers • Substance Abuse Counseling • Used Merchandise Stores (Red Cross, Salvation Army) • Youth Organizations

Community Targeting

Discovering Key Relationships

All Business & Non-profit Contacts

STEP 1: Select Target Area

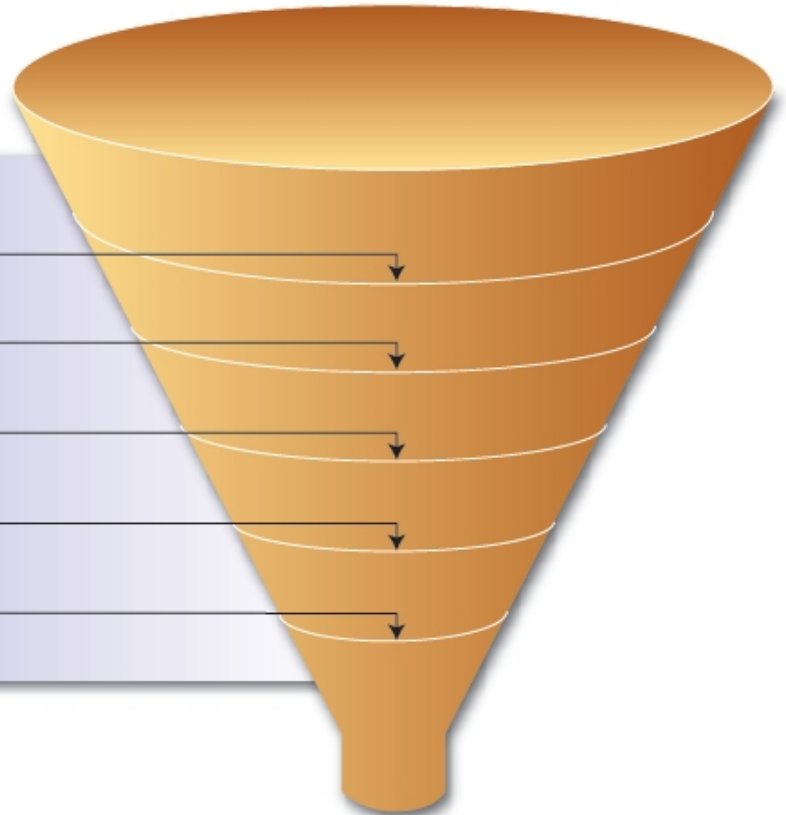
STEP 2: Obtain Non-residential Lists

STEP 3: Sort Key Groups

STEP 4: Prioritize and Narrow

Identifying Key Relationships

STEP 5: Pursue Relationships



Key Relationships

4

STEP 4 - Prioritize and Narrow

Goal:

- To identify the most strategic relationships from the Key Relationship Worksheet.

Products:

- A list of the most strategic key relationships that you seek to establish and pursue in your target area.

Overview:

- Determine how many Key Relationships to identify (e.g. 50, 100, 150, 200, etc)
- The Key Relationship Worksheet is reviewed to identify the most strategic contacts in the list.

Key Decisions:

- Determine how many Key Relationships to identify (e.g. 50, 100, 150, 200, etc) .
Note: if you decide to complete a needs assessment, these key relationships will become the list for interviews that you will complete over a period of 3 or more months. You can scale the list with that in mind now, or simply come back and add them later. A good range for needs assessment is 50 to 150.

Cost: Free

Time: 1 – 5 hours

Action Steps:

1. Apply Key Relationship Lens

- In the Key Relationship Worksheet, delete the current 1, 2, 3 ranking for all the contacts listed.
- Determine the lens to use for this sort. All three of the following categories are strategic and you will seek at some point in the future to meet with all the contacts. The issue becomes priority / urgency / timing. Ranking 1 are the highest priority contacts:
 - Ranking 1 – These contacts have significant potential for impacting your organization either directly or indirectly. You would actually pay money to meet with these people and would be very excited to meet with them. You would do whatever it takes to arrange your schedule to meet with these people. The average person would say “Wow...that is really cool that you are meeting with them...”
 - Ranking 2 – These are great contacts but are lower priority than the first group. You would like to meet with this group within a year but not necessarily immediately.
 - Ranking 3 – These are lower priority contacts but you want to continue watching them with the goal of meeting with them sometime in the future.
- By using the definitions of a 1, 2 and 3 ranking above, go through the list and assign rankings to each contact / organizations.
- After completing the ranking, resort the worksheet by the “ranking” column so that all the contacts ranked as a “1” are at the top. The “1s” become your Key Relationships to pursue.
- Hit the File / Save button to save this information in the Working File.

2. Validate and Add Missing Contact Information to Key Businesses and Non-profit Organizations

- Once you have moved over your key businesses/organizations you wish to contact you need to find contact person and phone number for Non -profits and some businesses. Use <http://foundationcenter.org> and www.guidestar.org to lookup information on non-profits. Your local yellow pages and www.superpages.com are also good resources for validation.

Community Targeting

Discovering Key Relationships

All Business & Non-profit Contacts

STEP 1: Select Target Area

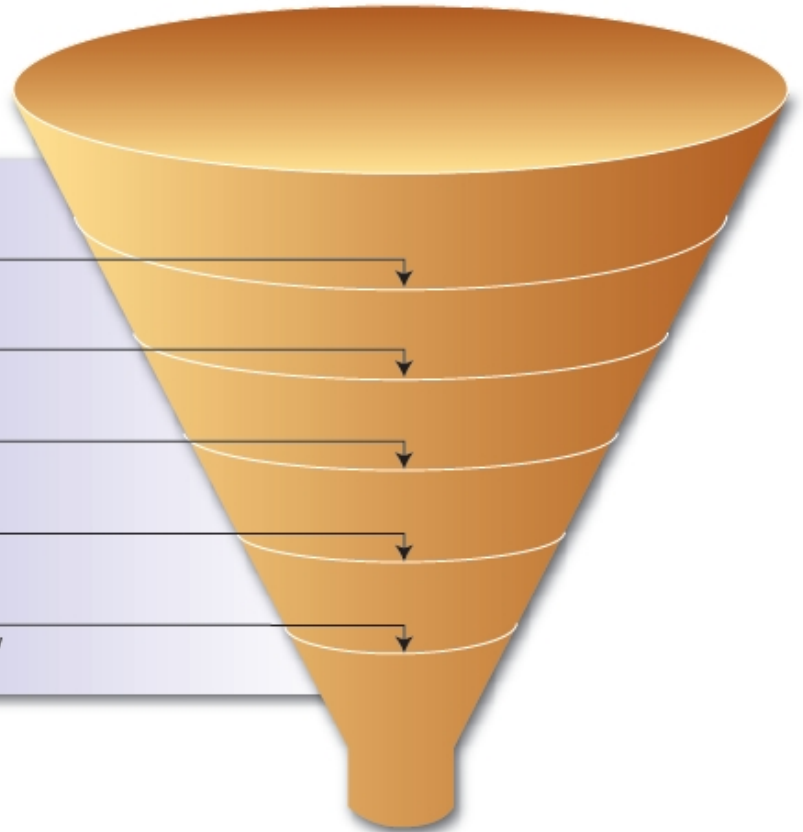
STEP 2: Obtain Non-residential Lists

STEP 3: Sort Key Groups

STEP 4: Prioritize and Narrow

STEP 5: Pursue Relationships

Building personal, first-name relationships with key leaders in the community



Key Relationships

5

STEP 5 - Pursue Key Relationships

Goal:

- Personal, "first name" relationships with the key organizations identified in step 4

Products:

- Meetings with key contacts
- A growing understanding of the community
- Expanding network of contacts who understand and support your mission
- A network of potential contacts for evangelism
- A network of potential contacts for community impact partnerships

Overview:

- This step is where relationships are initiated with key contacts through letters, phone calls and meetings

Key Decisions:

- Whether to conduct a Community Needs Assessment as a meaningful way to initiate relationships with key contacts?
- How to best pursue each key contact?

Cost: Free

Time: Varies

Action Steps:

1. Decide Whether to Conduct Community Needs Assessment

Contact Compassion By Design (www.compassionbydesign.org) to implement their Community Needs Assessment tool. This is an excellent process that provides a very specific reason (a "community needs assessment") to meet with the community leaders you have identified to gain their ideas, observations, and input about the community and its needs. We strongly encourage teams to complete a needs assessment. All organizations struggle with finding the sweet spot in marketing, networking and outreach. The conduct of a community needs assessment helps an organization position their marketing, networking and outreach activities for maximum effectiveness. The needs assessment employs your entire team in the process of talking with community members and leaders in a structured format that will grow the community network and create insight into the needs and values. You can download free information about this process or participate in a free conference call to learn more. Sign up at www.compassionbydesign.org.

The remaining steps are optional if you choose to complete a community needs assessment (the equivalent of these steps will be completed in a needs assessment).

2. Planning for Contact

Identify the specific content you would like to talk with each of your key relationships about during your initial meeting with them. This may be a community impact activity, a service project, or to share the vision / mission of the organization. Most people are busy and you don't want to waste their time. Consider looking for ways that your message can help the key contacts. Always ask "how can I help them" rather than "how can they help me." By helping the contacts you will build relationships that will ultimately help your cause. The more clear and actionable the message, and the more the person can see value in it to them, the easier it will be to secure a meeting and build the relationship. The content should help the person get excited about what you are doing and get involved. Have a clear agenda and message for the meeting.

NOTE: One benefit of the Community Needs Assessment is that it gives you a compelling reason to meet with your key contacts. Most community leaders want to hear about and be part of the assessment. The assessment will help you get meetings with the key contacts.

Use a Contact Management System. There are a number of great software programs available for managing your relationships. If you can not afford to buy one, use Excel or Word. Maintain a history log / journal of all contacts you make with each of your key contacts. Build a file for each contact that includes their hobbies, favorite restaurants, sports teams, family information, birthday, etc. Keep records of each meeting / contact including what was discussed and

whether any specific issues were of interest to the contact.

Contact the administrative assistant of each key contact. Often the key contact's assistant is the one who controls what mail and phone calls get through to their boss. Work to establish a first name relationship with the assistant. Learn what you can about them and their boss via the phone. Prior to sending any correspondence to the key contact, call their administrative assistant and let them know that the correspondence is coming. Ask them to be looking for it and to please make sure their boss gets it. Without paving the way with these assistants, your key contacts may never see your correspondence. The relationship with the assistant is nearly as important as the one with the key contact. Spend the time fostering solid relationships with the assistants.

Send an initial hand written letter to each of your key relationships to briefly introduce yourself, the work of your organization, and to let them know you'd like to get together.

Telephone each of your key relationships and ask for a 30 minute appointment to share the vision and mission of your organization.

3. Meet with the Key Contacts

Write down specific questions and topics you'd like to cover during the meeting. Do your homework and learn as much about the leader and their organization as possible before the meeting. Be sensitive to the issues that are important to the leader.

At the start of the meeting, state clearly why you are there and what you hope to accomplish. For example, "Thanks for taking the time to meet with me. My intent for the meeting is to gain a deeper understanding of your organization and its mission. [NOTE: do your homework prior to the meeting to learn as much as you can about the person and their organization. Make a statement about positive things that are happening. Don't come in completely oblivious. Show that you already know about the good things that are happening]. I want to share a little bit about my organization. I'm meeting with as many key community leaders as possible to see how we can help other community-minded leaders and ultimately have the biggest impact possible in serving the community."

Be on time and use good personal hygiene (e.g. breath mints, etc.). Honor the amount of time you have asked the person for. If you asked for a 30 -minute meeting, don't stay for 60 minutes.

Be sure to listen and do not spend the entire time talking. Ask questions that help you understand the Key Contact's organization and services. Help the person to feel that you care about helping them and that your agenda is not to get help. "My organization is seeking to positively impact the community. How can we help you in your mission?" Ask questions that show you care about the

community. Get the person talking about what is important to them as much as possible (more than you talk about yourself or your organization). After some period of time talking about themselves, most leaders will say “tell me about you” or “tell me about your organization.” Where possible, tie your organization to theirs. For example, “Like your organization, we seek to serve in a way that...” or “Like your organization, our biggest struggle involves....”

Before leaving, be sure to ask “Who else in the community would you recommend that I meet with?” Also, if the context is appropriate, look for some next step opportunity to either invite the contact to something or ask permission to follow-up with a meeting at some point in the future.

4. Follow-up and Ongoing Contacts

Write a personal thank-you note after the meeting. This personal follow-up is critical to building the relationship. Be sure to hand-write the note; be sure it is brief. Include your business card as an insert and any information the person make have asked for in the face-to-face meeting.

Follow-up on anyone he/she recommends in the meeting. Add them to the Key Relationship Database. If they are already in the Key Relationship Database but not listed in your top contacts, move them to that spot. Follow this process with the new person. Be sure to mention the person in your first conversation who recommended you meet with them.

Make a reminder in your calendar to make a follow-up contact with the person at some time in the future. If this is a person with whom a friendship can grow, the follow-up contact may within a few days or weeks. If this is a person interested in a particular event or program, the follow-up contact may be in the planning process that takes place for that event. If this is a person where doesn't seem to be an immediate connection, the follow-up contact may be 4-6 months later.

Reintroduce yourself at every opportunity – community events, restaurants, shopping, etc.

Look for opportunities to send out letters or announcements to your key contacts. Anytime you plan an event, invite the key contacts. If possible, send at least one letter per quarter to each contact. Make the notes personal where possible.