

## KEY TAKEAWAYS

## How to Work With Clients

People often asked how we got so much done as such a small firm. Our effectiveness was the result of having the right clients, a deeply experienced team, and a culture designed to do impactful work. Below, we've reflected on some of the key ingredients that played an outsized role and that we stand behind—they're insights that scaled the firm's collective learning in new ways, and ones that our team will carry with us.

**Choose clients thoughtfully.**


Just as we picked team members who aligned with our values, so too did we choose our client partners, because they were indeed partners. As we all worked toward a shared vision, it was imperative that we selected clients who were mission aligned. The referrals we received were a testament to the roster we had built.

**Speak hard truths.**

In the discovery phase of a project, we began with interviewing key stakeholders, which enabled us to get to the heart of their needs quickly. We distilled the insights and our recommendations into straightforward memos that never shied away from the truth. Having hard conversations isn't easy but philanthropy isn't about playing it safe, and we knew tough conversations ultimately elevated all of us to lean into our most ambitious goals and accelerated the path to getting there.

**Take a holistic approach, that includes strategy and governance.**

Clarifying or establishing a philanthropy's purpose, approach, and areas of work could not take flight until we addressed issues of governance—who held decision rights and why. This was especially important for multi-generational philanthropies and those seeking to share power not only to include family members but also the voices and influence of those most impacted. When



it came time to help donors sort through oftentimes tricky dynamics surrounding governance, we were able to guide them to solutions that created a harmonious path forward for everyone within their organization. This was a body of work we fine-tuned over the years, learning how to adeptly neutralize and depersonalize decisions that often felt deeply personal.



### **Reimagine strategic planning.**

The static five-year plan is outdated. We helped clients think more dynamically about their long-term goals, which often led to a necessary shift from strategic philanthropy to community-centered philanthropy, allowing clients to be more responsive to stakeholder feedback.



### **Prioritize process alongside deliverables.**

Our approach relied on getting everyone's buy-in at the outset, driving alignment and surfacing the best ideas from a client's entire team. This ultimately led to better engagement from stakeholders. Our process was designed to be transparent and supportive. We left room for everyone's ideas to evolve as the work took shape, showing that we prioritized getting it right, not just getting it done.



### **Lean into research.**

We learned early on the power of being able to make our case with narrative research that married data and storytelling. Research can reveal root causes that are based on policies and practices that favor one group over others. Only with these deeper insights can deeper solutions be found and funded.