The Tactical Guide to Selling More Sponsorship

A no frills user’s manual to selling more sponsorship…today!

By Chris Baylis
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The Sponsorship Collective
www.sponsorshipcollective.com
Welcome!

Congratulations on taking this step towards your success as a sponsorship sales person. This user’s manual is designed with the sponsorship seeker in mind, whether you work in the for profit sector, for a charity, a sports club or are a volunteer, this manual will help.

How to Use the Manual

The design of this manual is simple. Find the template or section that applies to your particular stage in the sales process and use it! Read the template, read the instructions, plug in your information and start selling sponsorship. That’s it!

You Weren’t Kidding When You Said “No Frills”!

No I wasn’t! I also wasn’t kidding when I said that you will sell more sponsorship either. These templates have been tested, by me, in the field and I have used these pieces to raise millions of dollars in sponsorship, cause marketing and events. This represents years of testing and a ton of trial and error.

I am not hiding behind flashy design or trying to trick you with imagery or outrageous claims. The format is simple, direct and ready for you to use right now.

About The Author

Chris Baylis is a sponsorship and corporate fundraising expert and has raised millions of dollars by connecting companies to causes that are important to them. Chris has managed the entire spectrum of the sponsorship process, from multi million dollar cause marketing campaigns to local event sponsorship….and everything in between.

Some campaigns of note include a 1.8 million dollar national cause marketing and sponsorship campaign, a six figure national sponsorship series as well as conference sponsorship agreements in the $200,000 range. Chris has worked with a wide range of brands including: Procter & Gamble, Pfizer, Microsoft, IBM, Abbott, Toys R Us and General Mills on regional, national and international campaigns. Chris is a board member of the Association of Fundraising Professionals and is the Founder of The Sponsorship Collective.
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The 5 Stages of Sponsorship Sales
Expanded 34-Point Checklist!

I have used this process to raise millions of dollars for charities, associations, events and private companies and I know it will work for you too.

Check out the expanded version of the Sponsorship Sales Checklist:

Stage 1: Prospecting and Pipeline Building:
- Make a sales chart in Excel (or use your database!) with the following headings: Prospects, Contact Made, Meetings Booked, Proposal Submitted, Follow-up Meeting, Outcome
- Identify 25 prospects as a starting point and enter them as a “prospect”
- Begin to move them through the pipeline
- Focus on moving prospects from one step to the next, not on closing the sale in the first meeting
- Check out your competitors to see who is sponsoring them
- Brainstorm with key staff about what companies you should be talking to and who can introduce you to those prospects
- Identify at least one networking event every two weeks where your prospects are likely to be

Stage 2: Sponsorship Inventory and Asset Valuation
- Break each event, program and opportunity into “properties” to sell
- Take each property and break it down further into “assets” (logo placement, speaking opportunities, free tickets etc.)
- Create a new chart listing each asset and the value you’ve assigned to it as a starting point
- Brainstorm with key staff to identify non-traditional opportunities beyond just logo placement
- Contact five sponsors, past and present, and ask them what they would like to see as part of their package or what they wish they had more of

Stage 3: The Sponsorship Package
- Create one package per property
- Identify your audience, program users, event attendees and any relevant demographic information
- List all of your assets and the associated value of each
- Think menu not “Gold, Silver, Bronze” and let your sponsors choose what works best for them
Mark your proposal DRAFT and connect with five sponsors and five prospects and ask them for their advice on what you are missing

Create a custom package based on each sponsor’s interest

Tell your sponsors in person and in the package itself that you want to build something tailored to their needs and everything in the package is negotiable

**Stage 4: Getting the Meeting and Making the Sale**

- Warm up every cold call: introduction from a committee member, referral from another sponsor or send a SHORT introductory e-mail
- Ask for an advice visit, never a sales call
- Never go in proposal first, in fact, bring nothing to your first meeting!
- Ask questions! Lots of questions! Spend more time listening than talking
- Understand the goal of the first meeting: to gather information, and get a second meeting
- Never submit a proposal without asking for permission to do so
- Think of your meetings as discussions between partners and not about convincing your prospect to buy an off the shelf proposal

**Stage 5: Activation and Fulfillment**

- Build a checklist based on your sponsorship package
- Assign dates and project leads for every item
- Check in with your sponsor regularly to make sure they take advantage of every item in the sponsorship package
- Take photos, screen shots and copies of all collateral and put them together in a fulfillment report
- Book a follow up meeting with your sponsor to deliver your report
- Ask your sponsors how they thought it went, what they thought of the fulfillment report and what you could do to improve
- Ask your sponsors to renew for next year!
- Schedule regular check ins in your calendar to stay front of mind with your sponsors
# Sales Pipeline Template

<table>
<thead>
<tr>
<th>Company</th>
<th>Contact</th>
<th>Title</th>
<th>Contact Info</th>
<th>Last Contact</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Prospect</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ford</td>
<td>Bruce Wayne</td>
<td>Owner</td>
<td><a href="mailto:Sample@sample.com">Sample@sample.com</a></td>
<td>01-Oct</td>
<td>Struggling to find contact</td>
</tr>
<tr>
<td>Gatorade</td>
<td>Chandler Bing</td>
<td>Director of Marketing</td>
<td>1-212-555-1234</td>
<td>15-Sep</td>
<td>Board member Jim Smith can make intro</td>
</tr>
<tr>
<td>Toyota</td>
<td>Chris Baylis</td>
<td>Director of Sales</td>
<td></td>
<td>10-Aug</td>
<td></td>
</tr>
<tr>
<td><strong>Contact Made</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Burger King</td>
<td>Clark Kent</td>
<td>Owner</td>
<td></td>
<td>01-Oct</td>
<td>Interested in branding</td>
</tr>
<tr>
<td>Volkswagen</td>
<td>Cosmo Kramer</td>
<td>Director of Marketing</td>
<td></td>
<td>15-Sep</td>
<td>Interested in speaking opportunities</td>
</tr>
<tr>
<td>Vandalay</td>
<td>George Costanza</td>
<td>Director, Latex Sales</td>
<td></td>
<td>10-Aug</td>
<td>Do not market to general public</td>
</tr>
<tr>
<td>Industries</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Meeting</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nike</td>
<td>Jim Smith</td>
<td>Owner</td>
<td></td>
<td></td>
<td>Creating custom proposal</td>
</tr>
<tr>
<td>McDonalds</td>
<td>JJ Jamieson</td>
<td>Director of Marketing</td>
<td></td>
<td></td>
<td>Second meeting booked</td>
</tr>
<tr>
<td>Chevrolet</td>
<td>Jon Voight</td>
<td>Director of Sales</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Proposal Submitted</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>GMC</td>
<td>Mike Jordan</td>
<td>Owner</td>
<td></td>
<td>01-Oct</td>
<td>$25,000</td>
</tr>
<tr>
<td>KIA</td>
<td>Paul Johnson</td>
<td>Director of Marketing</td>
<td></td>
<td>15-Sep</td>
<td>$50,000</td>
</tr>
<tr>
<td>Honda</td>
<td>Peter Parker</td>
<td>Director of Sales</td>
<td></td>
<td>10-Aug</td>
<td>$5,000</td>
</tr>
<tr>
<td><strong>Follow-up Meeting Booked</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Brooks</td>
<td>Peter Piper</td>
<td>Owner</td>
<td></td>
<td>01-Oct</td>
<td>Inviting director of marketing</td>
</tr>
<tr>
<td>Mr Clean</td>
<td>Phoebe Buffay</td>
<td>Director of Marketing</td>
<td></td>
<td>15-Sep</td>
<td>Presenting to executive team</td>
</tr>
<tr>
<td>Pepsi</td>
<td>Ross Geller</td>
<td>Director of Sales</td>
<td></td>
<td>10-Aug</td>
<td>Wants to discuss in more detail</td>
</tr>
<tr>
<td><strong>Confirmed</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Colgate</td>
<td>Stan Lee</td>
<td>Owner</td>
<td></td>
<td>01-Jan</td>
<td>Title sponsor</td>
</tr>
<tr>
<td>Converse</td>
<td>Tom King</td>
<td>Director of Marketing</td>
<td></td>
<td>03-Jan</td>
<td>AV Sponsor</td>
</tr>
<tr>
<td><strong>Declined</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reebok</td>
<td>Tony Jones</td>
<td>Director of Sales</td>
<td></td>
<td>01-Feb</td>
<td>Cutting marketing budget</td>
</tr>
</tbody>
</table>
How to Use the Sales Pipeline Template

This is the absolute least that you should be measuring. Don’t measure success by how much money comes in, not at first anyway. Measure success based on how many companies you move through each stage listed above.

The key is movement and consistency. Every single day, make a goal to move X companies from prospect to contact and X companies from contact to meeting etc. If every day you move prospects through every stage, you will have an immense amount of movement. Every time you move a company from prospect into another stage, replace them!

Every time you send an e-mail, or a phone call, or have a meeting, setup a reminder in one week to follow up with that person. Your calendar will fill up quickly and you will be having all the right conversations with your sponsors and your prospects.

Legend:

- **Prospects**: Enough research is done to know potential sponsors will want to hear from you, the result of your brainstorming and research
- **Contact made**: You have reached out to someone to find the best contact to move forward
- **Meeting**: You have a meeting confirmed- in person or by phone
- **Proposal submitted**: You have submitted a sponsorship package or proposal for feedback
- **Follow up meeting**: This is where you get more information about customising your proposal
- **Outcome**: What they said in response to your proposal
Sample E-Mails That Actually Get the Meeting

One of the most common mistakes made by sponsorship sales professionals and fundraisers is sending 10 page e-mails with a proposal attached in hopes that the recipient will open, read and respond by purchasing a pre-packaged sponsorship opportunity.

It just doesn’t work like that!

I coach people to keep their e-mails to two or three sentences and without fail, they send me their interpretation which is 9.5 pages with a proposal attached.

When I say two to three sentences, I mean it! Here are some e-mails that I have used, successfully, to find prospects, get meetings and sell sponsorship. I give you permission to steal these and use them (but please remember to change the names!).

I keep things informal and short enough that they’ve already read my e-mail before they hit the delete button.

**Sample 1:**

Hey Ray,
Any chance you can suggest the best contact for those in the product X side at your company?
Thanks,
Chris

**Ray’s Response:**

Hey Chris,

Yes you would contact Mike. He is the product X marketing manager. I’ve copied him on this email.

Cheers,
Ray
**My note to Mike:**

Hi Mike,

Just following up on Ray’s note. I would love to set up a quick call to discuss some of your areas of focus and see if there is some common ground between your priorities and our plans for 2015.

How does your schedule look on Wednesday? Does 3:00 work for a phone call? Thanks,

Chris

**Note:**

I only met Ray at a networking event, but Mike doesn’t know that. Mike thinks I know Ray and so he met me…and became a major sponsor for an event I was working on.

**Going in cold? No Problem! Try This...**

Hey Dave,

I saw on LinkedIn that you are involved in related product/project, I would love to connect and ask your thoughts about a cool project I'm working on.

Are you free tomorrow at 3:00?

Chris (no title here, just my name)

**Why it Works**

- So short, they can’t help but read it
- You flatter them and ask for their advice
- You give them a date and time, changing the decision from yes/no to whether or not that time works
- It isn’t a 20 page proposal!
- It’s focused on them, not you

It would be so much easier to send out a proposal and form letter to every single prospect…but you won’t make budget that way.
First Meeting Sample Questions

I am not a big advocate of bringing anything to your first meeting. Not a one pager, not a leave behind and definitely not a proposal! Instead, I would suggest bringing a pen and these questions. You can print them and go through them in order or, better yet, commit them to memory and work them into the conversation casually.

Try these questions for your next meeting to help you build a custom sponsorship proposal:

Who is your target audience?

________________________________________________________________

________________________________________________________________

How do you normally engage in sponsorship?

________________________________________________________________

________________________________________________________________

What does your target market value?

________________________________________________________________

________________________________________________________________

What can you tell me about your sales goals for the coming year?

________________________________________________________________

________________________________________________________________

What would you consider to be the most important elements of a sponsorship package?

________________________________________________________________

________________________________________________________________

Would you mind having a look at a draft proposal and offering some feedback?

________________________________________________________________

________________________________________________________________
Sample Sponsorship Proposal
Simplified Version

How to Use this Template

This template is meant to be a general guide and layout for a simplified sponsorship package. It assumes you know what your assets are worth and that you know a few things about your event attendees or other target demographic. This will work for event sponsorship, program sponsorship and in sport. I wouldn’t use this for cause marketing campaigns but it will help you lay the groundwork for that as well.

I am not a fan of standardized proposals that group everyone into “Gold, Silver and Bronze” packages and prefer a “menu approach.” You can combine the two and offer your prospects a menu of items to choose from that slots them into tiered sponsorship based on how much they spend. This is the most convenient way to move away from the standardized model currently used by most without having to move into the world of completely customized sponsorship. If you are looking at multi-million dollar naming rights, please do not use this template! Like it or not, those are completely custom…and well worth the effort.

The hybrid approach gives you the flexibility to negotiate packages without forcing people to take a booth or a speaking opportunity when all they really want are product placement opportunities. Use this template as a guide to give to your designer, or do a really simple version in PDF and drop in logos, graphs and tables from a spreadsheet. My advice is that you should always meet with your prospects and customize everything before you send it.

Remember: your sponsorship package is not the sales tool…you are!
Title Page

Include your logo and the name of the opportunity or program and your tagline.

Keep this simple and NEVER call it a “sponsorship package”!

LOGO HERE

Tagline

Dates

Location

Website
Describe Your Opportunity

**Paragraph one:**

Talk about your cause. Note, one paragraph only about your cause! Who you are and what you do. Plain and simple- don’t talk about need or sad stories. This is about what you can do for them, not what they can do for you.

**Paragraph two:**

Talk about the opportunity, program or event.

**Paragraph three:**

Talk about your users, attendees, delegates, board, etc. Basically the strength of the audience. If you have market research about your brand and who it appeals to, this is where it goes.

**Graphs, pie charts and anything else to describe your demographic**

If you are running an event, try something like this:

- Pie chart breaking down attendees by gender
- Graph breaking down attendees by age
- Pie chart showing attendees by city, province, country etc.
- Do you know salary? Interests? Buying power?
- Do you have a good photo showing a top notch event packed with people?

**The Goal of this Section**

The goal is to show off your opportunity, who attends and key demographic information. You can use two pages for this but not because you want to write more than three paragraphs! Use two pages because you can show off how much you know about your attendees or because you have stellar market research to share.
The Menu

Never say “sponsorship opportunities.” Instead use something like “Engage Leaders in Industry X” or “Reach out to People of a Certain Age or Geography” or “Come and Meet Canada’s X Sector”

Start with a statement about how you like to work with sponsors and your philosophy. Most orgs put a statement at the end of their package stating “we are also willing to customize. Contact us.” Don’t do this!

Instead, open by telling your prospects that these are suggestions to get the process started. Invite them to have a look and contact you with their own suggestions about how they want to engage your network.

List of your assets

• Booths
• Product placement
• Tables
• Session speakers
• AV Sponsorship
• Wine Sponsorship
• Dinner Sponsorship
• Name tag sponsorship

Add another note

Tell them that they are encouraged to choose from the list above or suggest some custom opportunities (or both!). Tell them that stage presence and speaking opportunities are reserved for title sponsorship only (if that’s true) and that title sponsorship is a completely customized opportunity in the range of $X-$X. Don’t make this number up. Base it on the proven value of your assets. Let your sponsors pull from the menu items to get them to, say, $25,000 for the Title Sponsorship.

What are we missing?

Make sure you include something here to ask them for suggestions. Remember, sponsorship proposals don’t sell sponsorship…you do!
The Chart

This is the typical “gold, silver, bronze” part that most people start (and stop) at. Here is how I like to lay it out. I do this in Excel and then copy and paste it. It looks boring, I know. That’s what designers are for! If you want to jazz it up, get a designer and tell them you want something simple and clean. Don’t have the budget? No problem- I have used highly designed packages as well as ones just like this. Because the package isn’t the sales tool (you are!) it matters less than you think.

Warning, this is a sample only. I am not suggesting you use any of these values or even this structure.

<table>
<thead>
<tr>
<th>Level</th>
<th>Investment</th>
<th>Signage on Stage</th>
<th>Provide an MC</th>
<th>Address the Crowd</th>
<th>Tickets</th>
<th>Booth</th>
<th>Ad Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title Sponsor</td>
<td>$25,000</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>10</td>
<td>1</td>
<td>Full page</td>
</tr>
<tr>
<td>Mid-Level</td>
<td>$15,000</td>
<td></td>
<td>X</td>
<td>5</td>
<td>1</td>
<td>1/2 Page</td>
<td></td>
</tr>
<tr>
<td>Dinner Sponsor</td>
<td>$10,000</td>
<td></td>
<td>X</td>
<td>2</td>
<td></td>
<td>1/2 Page</td>
<td></td>
</tr>
<tr>
<td>Wine Sponsor</td>
<td>$5,000</td>
<td></td>
<td></td>
<td>2</td>
<td></td>
<td>1/4 Page</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>$3,000</td>
<td></td>
<td></td>
<td>2</td>
<td></td>
<td>Business Card Size</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>$3,000</td>
<td></td>
<td></td>
<td>2</td>
<td></td>
<td>Business Card Size</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>$3,000</td>
<td></td>
<td></td>
<td>2</td>
<td></td>
<td>Business Card Size</td>
<td></td>
</tr>
</tbody>
</table>
Remind Them!

Tell them again that they get to decide what makes up the 25K to get them to title, mid-level, etc. Remind them that if they don’t want a booth that they get to trade it dollar for dollar for something else. In other words, if they want to trade the $500 booth for $500 worth of free tickets- you’re happy to do it!

Ask them questions throughout the document, engage them, encourage them to customize. In fact, outright tell them that you prefer to customize because only they know their business, not you. Why? Because as they customize they tell you what they want, how they measure success and what they are looking for. This is gold for the sponsorship sales person.
The Contact page

Use a title like “we want to hear from you!” Use a call to action.

Encourage them to get in touch, tell you what’s missing and tell you what they want to add or change. Make it clear that your proposal is a conversation tool and not set in stone. It’s important to say this in multiple places throughout the document- once per page. This way, even if they don’t read the entire proposal, you know they will understand your philosophy.

Make your contact info bold, obvious and uncluttered. Don’t use an info@ e-mail address! A real person with a real name only.
Sponsorship Valuation Template

Determining the value of your sponsorship assets is probably the step that causes the most confusion among sponsorship sellers. At best, most shops guess at the value of their assets and at worst, people badly undervalue their assets. Neither is desirable.

Some common examples include “selling” a wine sponsorship in exchange for free wine, or AV, or print materials. This completely ignores the value of your brand, audience and stakeholders. I have also seen people give away product placement opportunities since it doesn’t cost anything and may be seen as a value add to your customers, event attendees or program users.

The fact is, there is a value for every person that sees a logo, hears a company name and clicks on a link on your website. This process is part science and part art but it must be done. There are several ways to come up with your valuation but they tend to fall into one of two categories: the transaction method and the value method. I will explain both below before offering a template for you to use.

The transactional approach applies a value to every logo placement, booth, ad, speaking engagement. You use current advertising rates to come up with your value, apply a percentage for aligning with your brand and that becomes the sponsorship value. So, if we use the wine sponsor as the example. Wine is $1,000 plus logo placement at $5 per attendee, plus acknowledgment from the MC twice at $250 each, plus a 10% affiliation bump. Add them all together and you are at $2750 for the wine sponsor.

The value method is easier in many ways and is more art than science. For example, you determine that the sponsorship of the wine is worth two or three times the cost to purchase the wine and recognize your sponsors. So, if wine costs $1,000 then the wine sponsor is a $3,000 opportunity. You can have the wine donated but that company still has to give cash on top of the in-kind gift.

Here’s the thing: both work, both have their shortcomings and both methods have scenarios that suit them better than others. It should be no surprise that I advocate a blended method. Sometimes just adding up the transactions leaves you way undervalued or things, like product placement, can be really hard to put a value on. By blending the two methods, you give yourself the flexibility to make maximum revenue and still be able to justify to your sponsors how you came up with a particular value.
Valuation Template

<table>
<thead>
<tr>
<th>Dinner Sponsor</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Hard Costs</strong></td>
<td></td>
</tr>
<tr>
<td>Food</td>
<td>$7,500.00</td>
</tr>
<tr>
<td>Signage</td>
<td>$175.00</td>
</tr>
<tr>
<td>Branded tent cards</td>
<td>$125.00</td>
</tr>
<tr>
<td>Free table of 10</td>
<td>$1,500.00</td>
</tr>
<tr>
<td><strong>Sub Total</strong></td>
<td><strong>$9,300.00</strong></td>
</tr>
<tr>
<td><strong>Marketing Costs</strong></td>
<td></td>
</tr>
<tr>
<td>Views</td>
<td>Marketing Value per 1000 Views (Google, Twitter etc)</td>
</tr>
<tr>
<td>Logo on website</td>
<td>1500</td>
</tr>
<tr>
<td>Logo on invitation</td>
<td>500</td>
</tr>
<tr>
<td>Ad in program</td>
<td></td>
</tr>
<tr>
<td>Free booth</td>
<td></td>
</tr>
<tr>
<td>Send e-mail to database</td>
<td>2000</td>
</tr>
<tr>
<td><strong>Sub Total</strong></td>
<td><strong>$2,750.00</strong></td>
</tr>
<tr>
<td><strong>Opportunity Value</strong></td>
<td></td>
</tr>
<tr>
<td>Address the crowd</td>
<td></td>
</tr>
<tr>
<td>VIP Meet and Greet</td>
<td></td>
</tr>
<tr>
<td><strong>Sub Total</strong></td>
<td><strong>$1,500.00</strong></td>
</tr>
</tbody>
</table>

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Asset Sub Total</td>
<td>$13,550.00</td>
</tr>
<tr>
<td>Brand affiliation (10%)</td>
<td>$1,355.00</td>
</tr>
<tr>
<td>Activation and Fulfillment Costs</td>
<td>$1,355.00</td>
</tr>
<tr>
<td><strong>Sponsorship Value</strong></td>
<td><strong>$16,260.00</strong></td>
</tr>
</tbody>
</table>

Notes:

- Some things had hard costs, others have a value elsewhere (like advertising) others still have no value in the marketplace
- This represents a blend of the two approaches
- Always include a percentage to be able to activate the sponsorship properly
- You can play with the numbers that don’t have an external value to get the number that fits your goals. The best way to increase the cost is to add valuable benefits that you can charge for
- Do this for every sponsorship asset and be ready to share it when sponsors ask how you came up with a particular number
# Activation Strategy

<table>
<thead>
<tr>
<th>Asset</th>
<th>Deadline</th>
<th>Lead</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order food</td>
<td>01-May</td>
<td>Jerry</td>
</tr>
<tr>
<td>Design signage</td>
<td>01-Feb</td>
<td>Elaine</td>
</tr>
<tr>
<td>Logos from sponsors</td>
<td>01-Feb</td>
<td>George</td>
</tr>
<tr>
<td>Approval from sponsor</td>
<td>15-Feb</td>
<td>Kramer</td>
</tr>
<tr>
<td>Place signage at event</td>
<td>01-May</td>
<td>Frank</td>
</tr>
<tr>
<td>Order tent cards</td>
<td>01-May</td>
<td>Estelle</td>
</tr>
<tr>
<td>Approval from sponsor</td>
<td>15-Feb</td>
<td>Babs</td>
</tr>
<tr>
<td>Placement of tent cards at event</td>
<td>01-Jun</td>
<td>Morty</td>
</tr>
<tr>
<td>Get names of guests from sponsor</td>
<td>01-May</td>
<td>Helen</td>
</tr>
<tr>
<td>Add logo to website</td>
<td>01-Feb</td>
<td>Jerry</td>
</tr>
<tr>
<td>Add logo to invitation</td>
<td>01-Feb</td>
<td>Elaine</td>
</tr>
<tr>
<td>Send branded invitations</td>
<td>01-May</td>
<td>George</td>
</tr>
<tr>
<td>Design ad for program</td>
<td>01-May</td>
<td>Kramer</td>
</tr>
<tr>
<td>Ad approval from sponsor</td>
<td>15-Feb</td>
<td>Frank</td>
</tr>
<tr>
<td>Secure booth space</td>
<td>15-Feb</td>
<td>Estelle</td>
</tr>
<tr>
<td>Get names of booth attendees</td>
<td>01-May</td>
<td>Babs</td>
</tr>
<tr>
<td>Design e-blast for database</td>
<td>01-May</td>
<td>Morty</td>
</tr>
<tr>
<td>Approval from Sponsor</td>
<td>15-Feb</td>
<td>Helen</td>
</tr>
<tr>
<td>Invite sponsor to speak at event</td>
<td>01-Jun</td>
<td>Jerry</td>
</tr>
<tr>
<td>Introduce sponsor at event</td>
<td>01-Jun</td>
<td>Elaine</td>
</tr>
<tr>
<td>Write speaking notes for MC</td>
<td>01-May</td>
<td>George</td>
</tr>
<tr>
<td>VIP meet and greet organising</td>
<td>01-May</td>
<td>Kramer</td>
</tr>
<tr>
<td>Extend invitations to key sponsors</td>
<td>01-May</td>
<td>Frank</td>
</tr>
</tbody>
</table>
How to Use This Template

When you sell a sponsorship package, the first thing you should do (yes, even before sending an invoice) is to build a strategy based on your sponsorship levels for how you are going to make sure that your sponsor takes advantage of, or “activates,” their sponsorship benefits. This includes key dates, who on your team is responsible and what the sponsor needs in order to activate fully.

Create a table like this for every single sponsorship package you sell. Have a meeting with your team to discuss expectations and add these dates to your calendar. Do this and the likelihood that you miss something will go down significantly.
Sample Fulfillment Report

How to Use this Template

Once your sponsorship agreement is up, you want to show your sponsors that you delivered on your promises. Arrange a meeting with your sponsors. Invite them to bring anyone else on their team who has a hand in guiding their sponsorship spending to seek their feedback as well.

Before you meet, create and deliver your fulfillment report, which documents all the things you said you would do along with all of the things you missed and why. Go one step further and include pictures, screen shots of their logos, recordings of speaking engagements, product placement…everything!

What purpose does this serve? It does all of the following:

• Proves to your sponsor that you delivered
• Gives your sponsor something to share with their superiors to justify the investment
• Tells your sponsor that you are a professional and know how important their investment is
• Reminds them of all of the things they received in their sponsorship package
• Sets you up to ask for feedback and ask even more questions about their goals to give you sponsorship package ideas for next year

You have to be honest though, if you missed something then you have to admit it here and explain why.
Title Page

Include your logo and the name of the opportunity or program and your tagline.

This part will look just like your sponsorship package but with updated information.

LOGO HERE
Tagline
Dates or name of sponsorship opportunity/campaign
Location
Website
Describe Your Opportunity…Again!

Paragraph one:

Talk about your cause. Note, one paragraph only about your cause! Who you are and what you do. Plain and simple- don’t talk about need or sad stories. This is just a simple reminder.

Paragraph two:

Talk about the opportunity, program or event. How it went, how it exceeded your expectations and testimonials from people of note.

Paragraph three:

Talk about your users, attendees, delegates, board, etc. Basically the strength of the audience. If you have market research about your brand and who it appeals to, this is where it goes.

Graphs, pie charts and anything else to describe your demographic

Use similar stats to what you featured in your sponsorship package but updated with the most current stats.

- Pie chart breaking down attendees by gender
- Graph breaking down attendees by age
- Pie chart showing attendees by city, province, country etc.
- Do you know salary? Interests? Buying power?
- Do you have a good photo showing a top notch event packed with people?

The Goal of this Section

The goal is to show off your opportunity, who attended and key demographic information. You can use two pages for this but not because you want to write more than three paragraphs! Use two pages because you can show off how much you know about your attendees or because you have stellar market research to share.
The Fulfillment Report

This is it, the moment of truth! Remember, the activation schedule is based on the sponsorship proposal and so the fulfillment report is based on the activation schedule. Using the same example as above, here is how this will look:

<table>
<thead>
<tr>
<th>Asset</th>
<th>Status</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dinner delivered</td>
<td>Delivered</td>
<td></td>
</tr>
<tr>
<td>Signage at event</td>
<td>Delivered</td>
<td></td>
</tr>
<tr>
<td>Branded tent cards</td>
<td>Delivered</td>
<td></td>
</tr>
<tr>
<td>10 guests in attendance</td>
<td>Did not deliver</td>
<td>Sponsor opted not to send all 10 guests</td>
</tr>
<tr>
<td>Logo on website</td>
<td>Delivered</td>
<td></td>
</tr>
<tr>
<td>Logo on invitations to database</td>
<td>Over Delivered</td>
<td>Sent branded save the date and invitation</td>
</tr>
<tr>
<td>Full page ad in program</td>
<td>Delivered</td>
<td></td>
</tr>
<tr>
<td>Exhibit space</td>
<td>Did not deliver</td>
<td>Sponsor opted not to have a booth</td>
</tr>
<tr>
<td>Custom e-blast to database</td>
<td>Over Delivered</td>
<td>Sent three e-blasts</td>
</tr>
<tr>
<td>Sponsor addressed the crowd</td>
<td>Delivered</td>
<td></td>
</tr>
<tr>
<td>Sponsors thanked by MC</td>
<td>Delivered</td>
<td></td>
</tr>
<tr>
<td>Two VIP tickets</td>
<td>Delivered</td>
<td></td>
</tr>
</tbody>
</table>

Take a close look here. Where you over delivered, you tell them how you did so. Where you did not deliver, you tell them that too! If it’s your fault, admit it and be sure to show them how you made up by over delivering elsewhere. Be honest! Your sponsors already know if you missed something but this is your chance to remind them of how great you did.

Remember the valuation piece? Well, if you miss something, it has a firm value to you and to your sponsor. Your sponsors can ask for a refund for missed delivery, which is why activation and fulfillment are so important.
Pictures, Samples and Everything Else

This is my favourite part of the fulfillment report! In this section I include every photo I can find with a logo or member of my sponsor’s company. In fact, I give my photographer a list of assets to take a picture of and I go around with my phone and take backup photos. That’s how important this piece is.

I take pictures of the program with my sponsor’s ads and I take screen shots of the website. If I sent out hard copies of invitations, I include those too. If it was branded, I save a copy and bring it with me to the meeting.
The Last Page

The final page is simple. I use it to thank my sponsor and to remind them of how valuable this property (or sponsorship opportunity) is. I tell them how much they added to the event with their brand and their support. I also use this section to ask them for feedback so that we can improve next year.

In the meeting, I might ask them why they didn’t send people to the event and then use that information to find out more about what they value. I always ask them what I need to do next year to make the experience even better. I never leave without asking them to confirm their support for next year and when the best time would be for me to submit a draft sponsorship proposal for their feedback.

The fulfillment report closes the loop, sets you out above the rest and starts the process all over again. The last thing your sponsor remembers of you is how much value you provided. In this way you’ve controlled their experience and taken the opportunity to correct anything that went wrong.

This is how you want to leave your sponsor feeling every single time you talk to them.
Closing Thoughts

It took me several years, lots of trial and error, and several uncomfortable situations to develop these templates. My hope is that you will read this, find something valuable and be able to implement it immediately.

This manual is devoid of theory on purpose. It should not sit on a shelf or on your desktop. Print it. Put it somewhere that you will see every day and most of all...use it.

Let me know what you think!

Warmly,

Chris Baylis
Founder, The Sponsorship Collective
www.sponsorshipcollective.com

Check out all of the sponsorship resources and training options available by visiting our website:

www.sponsorshipcollective.com

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