

The summary sheet

Step 4: Prioritization

Chapter 3: The Exercise

Workshop objectives

- Prioritize donors according to a clear matrix by dividing them into 4 categories
- Identify a top 10 of priority donors (category "Rock Stars").
- To make collective decisions based on data, not impressions.

Practical organization

Duration: 1/2 day (3 hours).

Participants: Same team as the previous stages

Animation:

- 1 facilitator: Manages the time, discussions and keeps the workshop moving forward.
- 1 note-taker: Recalls the key data and fills in the matrix.

Material:

- In-person setup: Flip chart, sticky notes, pens, timer.
- Online: Collaborative tool (Miro, Mural, Google Jamboard) + shared PPT.

Workshop outline

Step 1: Reminder of the method

Support: Use the provided PowerPoint as a tool.

Step 2: Recreate the matrix

2 options:

- In-person: Draw the matrix on a flip chart.
- Online: Use the blank slide in the PPT.

Step 3: Identify the donors

Instructions:

- Review the list of donors from your mapping. Preliminary sorting if necessary: Keep the current donors, but remove those already identified as less relevant ("dead weight").
- 1 sticky note (or digital box) = 1 donor.

Step 4: Position the donors

Process for each donor:

- The presenter reviews the key data (mapping).
- The group discusses and decides on the positioning.
- The note-taker places the sticky note on the matrix.

Advice:

- Start with the current donors (easier to evaluate).
- Based on data: No "gut feeling" decisions!
 - *"I don't really like this donor" → Avoid.*
 - *"According to the mapping, alignment is low and funding is high → Cash cows."*