****

**Advisory Team - Tips for Success**

1. **Establish a good working relationship.** Be kind, courteous and understanding.
2. **Listen first, speak second**. You bring a valuable experience and perspective to the table and the inclination can be to jump right in and share it. Remember you will have more impact in the long run if you listen first to what the investee needs, and take time to understand their perspective.
3. **Get to know the Investee.** Visit their website. Read their SVP application and OCAT Executive Summary. Understand who they serve, how they serve them and what their end goal is.
4. **Recognize the differences that exist between the for-profit and nonprofit worlds.** Respect the organization’s values, culture and priorities which may be different from your own. Be sensitive to expecting too much too quickly.
5. **Communication is key.** Define working communications and meetings with the Investee representative(s) you are working with early on. Be responsive to their communications and clear about times you will not be available. Make sure that communication is two-way
6. **Demonstrate flexibility.** Remember that you are not the Investee’s only priority. Nonprofits have a lot to juggle. A delayed response or lack of action does not automatically mean that they are not invested in the work.
7. **Balance expertise with humility.** Often times this is the first time an Investee has done capacity building or engaged an outside group for “consulting”. They may feel vulnerable opening their doors, and showing their weaknesses. You can help them feel comfortable and at ease by approaching your role with respect and humility.
8. **Watch your boundaries**. Keep the scope of your project and the Investee work plan in mind. Consult with your LP and/or the SVP staff if you are asked to do something above and beyond the original task at hand.
9. **Communicate with your Lead Partner**. Your LP is the central point of communication and coordinator of work with the Investee. Attend A Team meetings, provide regular updates on your project(s) and ask questions. Keeping them in the loop is integral to positive and seamless project coordination.

**AND MOST IMPORTANTLY…**

1. **Have patience. Change takes time.** Realize that the initial forecasted outcomes might take much longer than originally expected. Many times we are coming in and supporting the development of new processes or systems, but it takes time for those to be fully integrated into their culture, sometimes years after the new systems are operational.