**Breakout Group Instructions:**

1. **Select one of the two financial storytelling frameworks and map out your financial story with your colleague in the appropriate table below (7 min)**
2. **Practice telling your financial story to folks from a peer organization (5 min)**
3. **Reflect on the experience as a group (3 min)**

* Presenters: How did it feel to tell your financial story?
* Listeners: How did the story land for you? What clarifying or follow-up questions do you have for the presenter(s)?

1. **Switch roles and repeat**

**Approach 1: Leading with Mission**

**What story do you want to tell? Why do you want to tell it?**

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**Who is your audience for this story? Who needs to hear it? It’s okay to have your story tailored for different audiences.**

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| **Map Out the Financial Story** | | |
|  | **Notes** | **What Financial Data Can You Use to Illustrate?**  (e.g. income statement, mos. of cash, surplus last year) |
| 1. **Lead with Mission** |  |  |
| 1. **What Happened?** |  |  |
| 1. **How Did You Respond?** |  |  |
| 1. **Effect on Mission** |  |  |
| 1. **What Do You Need?** |  |  |

**Approach 2: Articulating Your Value Proposition**

**What story do you want to tell? Why do you want to tell it?**

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**Who is your audience for this story? Who needs to hear it? It’s okay to have your story tailored for different audiences.**

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| **Map Out the Financial Story** | | |
|  | **Notes** | **What Financial Data Can You Use to Illustrate?**  (e.g. income statement, mos. of cash, surplus last year) |
| 1. **Name the Challenge** |  |  |
| 1. **Services Provided?** |  |  |
| 1. **Track Record?** |  |  |
| 1. **Effectiveness of Approach over Alternatives?** |  |  |
| 1. **What Do You Need?** |  |  |