Moderated by:

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FUNDRAISE

YOU’VE GOT A CAUSE. LEARN HOW TO FUND IT.
Meet Your Presenter:

Lenise Andrade
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POLL: Tell us about yourself!

How many years of fundraising experience do you have?
Objectives

• Learn how to set yourself up for a successful meeting
• Explore how to leverage your CRM
• Investigate the components of a successful phone call
• Discover how to determine what donors are really thinking
Who should you be reaching out to?
What is Pre-Approach?

The planning and preparation done prior to contact with prospect.
Keeping Up Your Donor Database

• Preliminary information you need depends on your organization:
  1. Full name & nickname
  2. Email address & street address
  3. Phone number
  4. Name of their employer
  5. Family information (spouse, number of children, etc.)
Keeping Up Your Donor Database

• **Preliminary information** you need depends on your organization:
  6. Demographic information (*age, gender, religion, etc.*)
  7. Personal information (*clubs, memberships, college, hobbies, etc.*)
  8. Projected giving capacity
  9. Source of prospect (e.g. referral?)
 10. Known philanthropic interests
Finding Prospects in your Database

A Prospects

• Renewing donors who have given for \textit{3+ years} in a row with no increase
• \textbf{Reactivated} donors
• New “\$500+” donors whom you don’t know*

* \textit{Choose a dollar amount that is relevant to your organization!}
Finding Prospects in your Database

B and C Prospects

- Zip code sort
- **Frequent** ticket buyers
- High **bidders** (not necessarily winners)
- Anyone who opted to make a donation from **your website**
Pre-Approach Checklist

- Who drives philanthropic decisions?
- Giving history with your organization
- Personal interests
- Passions and priorities
- Other charitable work and giving
- Connections
Set Up Meetings the Right Way

• Think about timing

• Choose the location wisely (e.g. Zoom; physical location if appropriate)

• Connect with gatekeepers

• Be clear about who you are and why you want to meet
Building Rapport with Gatekeepers

- Be authentic
- Be honest
- Build a relationship
- Sell the cause

- Say thank you
- Keep things light
- Be patient
The Anatomy of a Phone Call

1. **Introduce Yourself and Your Organization**
2. **Take the Curse off the Call**
3. **State the Purpose of the Call**
4. **Make an Interest-Capturing Statement**
5. **Request an Appointment**
6. **Overcome Resistance**

The goal is to secure a **face-to-face meeting*** with your prospect.

*“Face-to-face” may apply to an in-person or virtual environment.
How should you reach out?
What is the Approach?

Speaking to (and sounding out) your prospect for the first time.
Nail the Greeting

- Be confident.
- Be different.
- Take the lead.
- Read the (virtual) room.

- Remember their name.

*These steps will be navigated differently depending on the environment (virtual; in-person; event; etc.)*
First Impression Boosters & Breakers
Give Donors the Gift of Being Remembered

• Pay attention
• Concentrate
• Associate

• Observe
• Repeat
Relevant Benefit Approach

You know the issues and areas that are of the most interest to the prospect.

Impact Approach

You already know the prospect’s dominant gifting motive, and they have the capacity and/or influence to make transformational gifts.

Curiosity Approach

When you know your prospect’s hot button issues and can relate it to your organization’s current work.

Compliment Approach

After you’ve learned something impressive about the prospect and can relate it to your cause.

Referral Approach

When you know someone else who has given to your organization who the prospect both knows and respects.
You don’t ask your way into a gift; you listen your way into a gift.
What is Need Discovery?

The process of becoming aware of the essential connections between your prospect and your cause.

Don’t convince; don’t tell – Discover with them
How to Ask Good Questions

Closed-Ended

Have you ever given to this organization?

Have you felt appreciated as a donor in the past?

Is our organization one of your top three priorities?

Open-Ended

I would love to hear more about why you give to our organization.

What was something an organization did that made you feel appreciated as a donor?

What organizations are your philanthropic priorities?
What are other questions you can ask your prospects/donors?

- Personal questions
- Philanthropic-centered questions
- Cause-specific questions
SUMMARY

• Planning and preparation is essential.

• The purpose of the pre-approach is to set a face-to-face meeting.

• Use a script and the 6-Step Telephone Track while you’re getting comfortable on the phone.

• Make a deliberate first impression.

• Plan ahead.

• Ask thoughtful questions to get to the heart of what drives your donors.

• Listening is a critical skill.
Connect with Lenise!

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QUESTIONS?

Send them through the chat!
THANK YOU

TAKE YOUR CAUSE AND
CREATE IMPACT.