

# fundraising academy

CAUSE SELLING EDUCATION



*Wednesday, July 21, 2021*

**Fresh Starts: Reigniting Donor Relationships**

***Moderated by:***



**Christine Kim**  
Project Coordinator  
*Fundraising Academy*

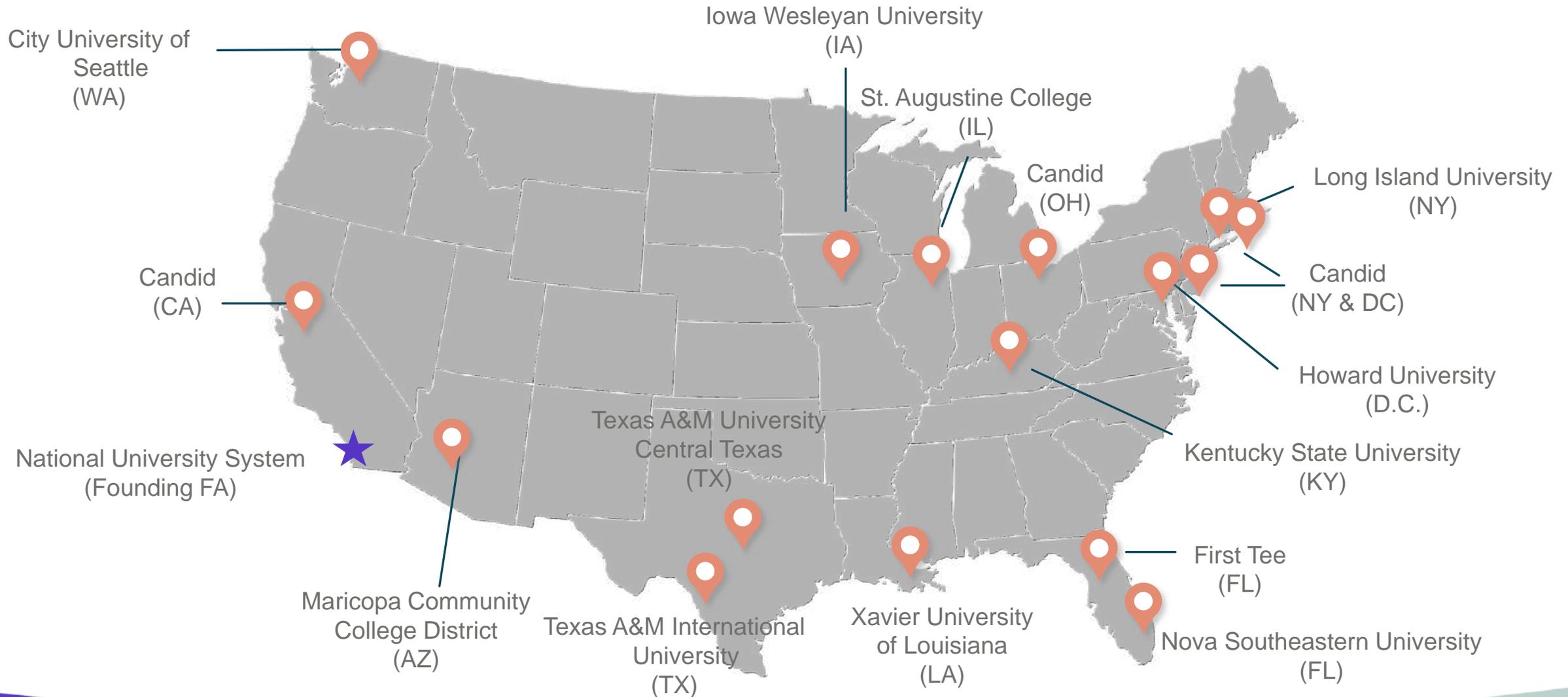


# FUNDRAISE

YOU'VE GOT A CAUSE.  
LEARN HOW TO FUND IT.



# Our Affiliate Partners



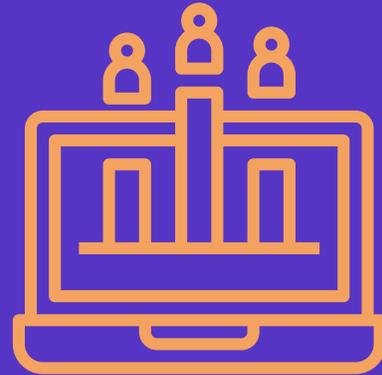


# Meet Your Presenter:

## Lenise Andrade

Senior Philanthropy Officer  
*San Diego Botanic Garden*

# POLL: Tell us about yourself!



**How many years of fundraising experience do you have?**

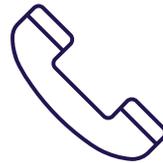
# Objectives



- Learn how to set yourself up for a successful meeting



- Explore how to leverage your CRM



- Investigate the components of a successful phone call



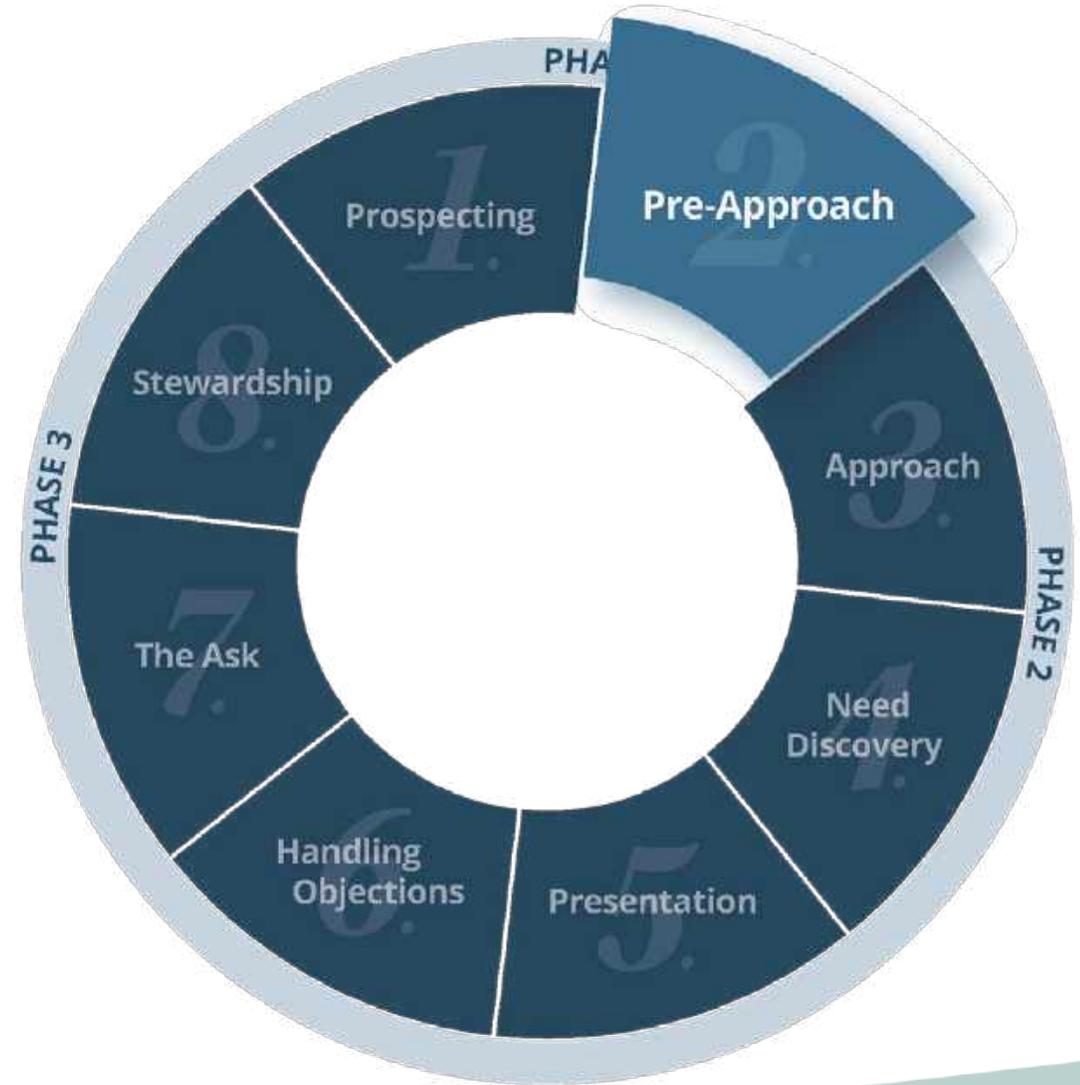
- Discover how to determine what donors are really thinking



***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

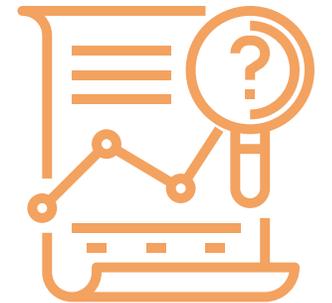
- **Preliminary information** you need depends on your organization:

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 **3+ years** in a row with **no increase**
- **Reactivated** donors
- New “**\$500+**” donors whom you don’t know\*

*\* 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



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

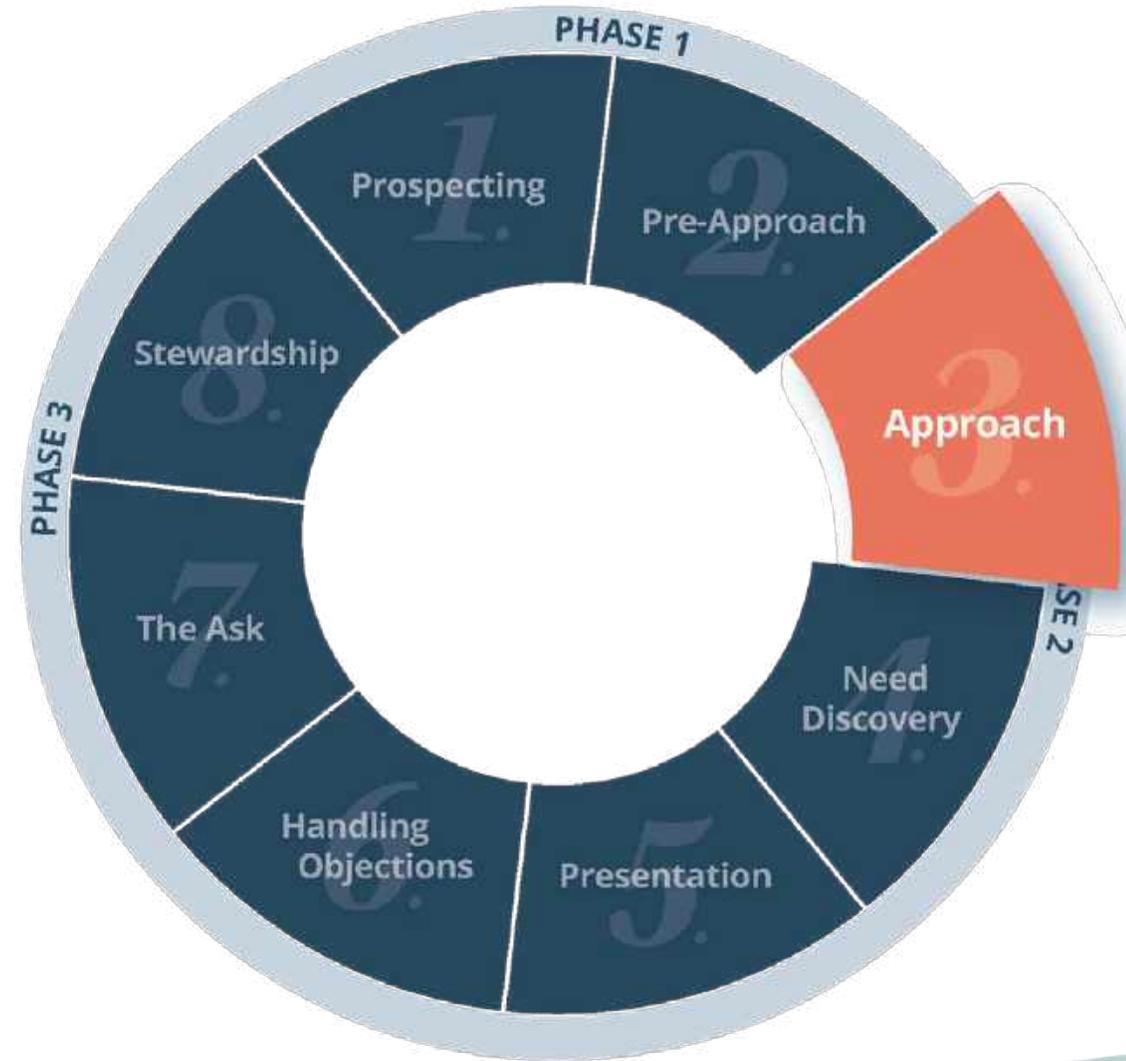
\* *“Face-to-face” may apply to an in-person or virtual environment.*

A close-up photograph of two hands shaking in a firm grip, symbolizing agreement or partnership. The hands are positioned in the center of the frame, with the fingers interlaced. The background is a dark, textured blue, possibly a button-down shirt. The overall image has a dark, moody aesthetic with a blue color palette.

***How should you reach out?***

# What is the Approach?

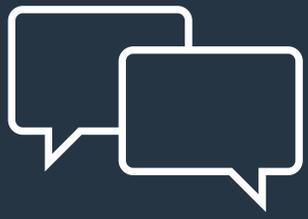
**Speaking to (and sounding out) your prospect for the first time.**



# 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.)*



# COMMUNITY SHARE

*First Impression Boosters & Breakers*

# Give Donors the Gift of Being Remembered

- **Pay attention**
- **Concentrate**
- **Associate**
- **Observe**
- **Repeat**

# APPROACH

# USE CASE

## 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**.

A man and a woman are seated at a table in a restaurant, facing each other and engaged in conversation. The woman is on the left, wearing a light-colored top, and the man is on the right, wearing a light-colored shirt. The table is set with plates of food, glasses, and a small basket of bread. The background shows a window with vertical blinds. The entire image is overlaid with a semi-transparent dark blue filter.

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?*

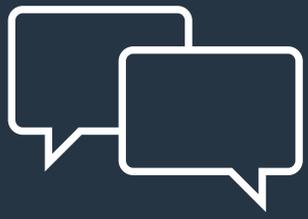
*Is our organization one of your top three priorities?*

## 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?*



# COMMUNITY SHARE

*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?

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*Send them through the chat!*



# THANK YOU

TAKE YOUR CAUSE AND  
CREATE IMPACT.

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