fundraising academy

CAUSE SELLING EDUCATION

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Prospecting in a Hybrid World

Moderated by:

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FUNDRAISE

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

Meet Your Presenter

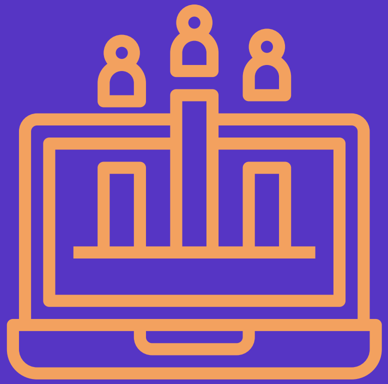
Christa Stoneham

President and CEO
Houston Land Bank

Objectives

- Qualify and prioritize your prospects based on their propensity to make a meaningful gift
- Leverage your CRM to its greatest potential
- Discover what you need to know before you can approach your donor

POLL: Tell us about yourself!

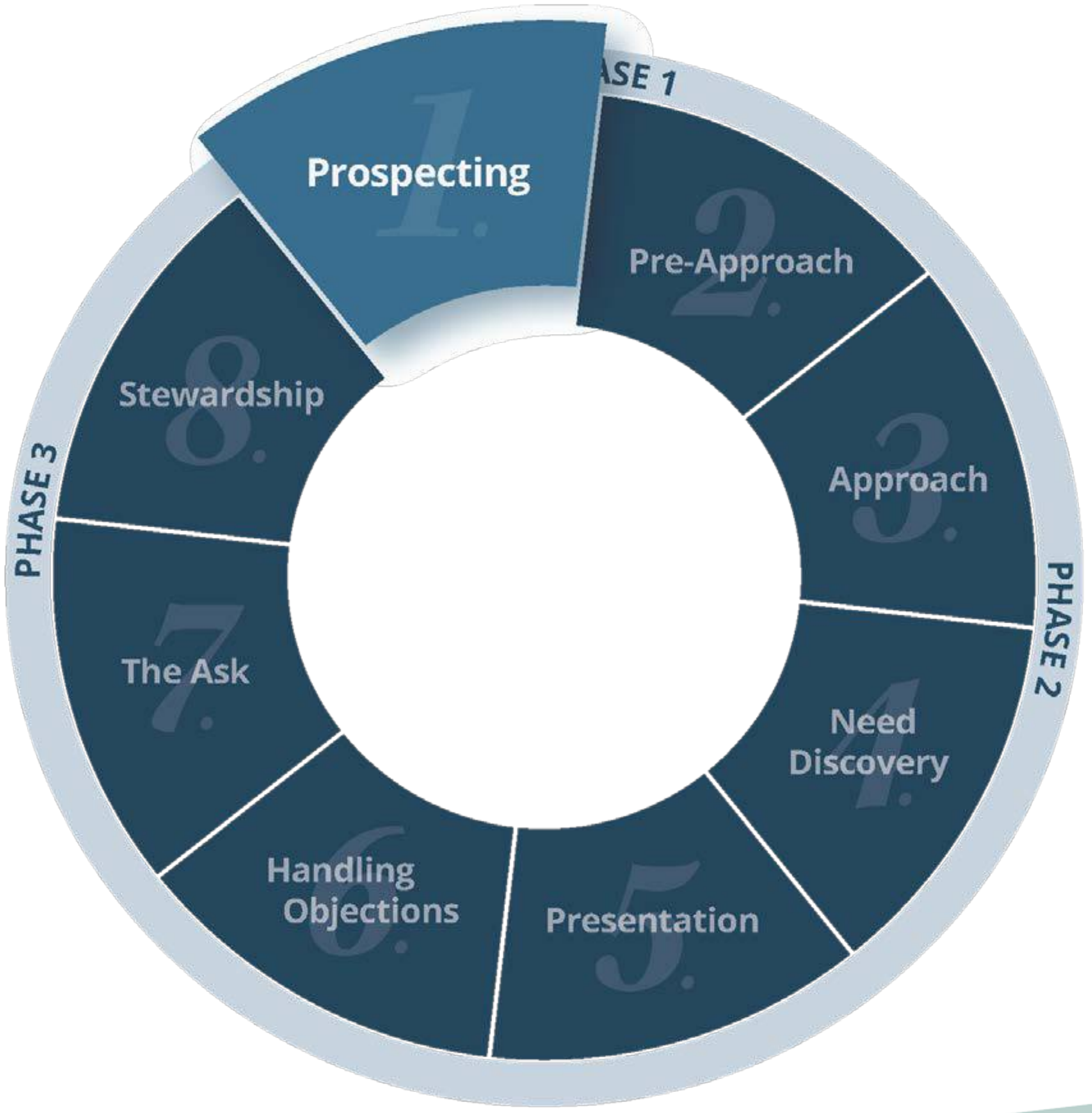


How many years of fundraising experience do you have?

Who should you be reaching out to?

What is Prospecting?

The process of **looking** for, or **searching** for, prospective donors



A Qualified Prospect

A **QUALIFIED PROSPECT** is someone who has:

- The ***means*** to give
- The ***ability*** to make the giving ***decision***;
- An ***interest*** in your organization’s mission; and
- An ***existing relationship*** with your organization’s staff, volunteers, or leadership that provides access to make a request for support.

Methods of Prospecting

1. Referrals
2. Influencers
3. Events
4. Direct Marketing
5. Social Media Marketing
6. Warm Calling
7. Networking
8. Lead Generation Software
9. Website
10. Crowdfunding

Referral

A name given to you by a donor, board member, friend, or a prospect who hasn’t given but feels good about you and your organization.

Centers of Influence

Identify the people who feel good about you, feel good about your cause, and who have a network or connections that would be valuable to your cause.

COMMUNITY SHARE

How has your prospecting changed (or stayed the same) in this hybrid world?

Which method of prospecting has been the most successful for you and your organization?

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

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**

What preparation do you need before you meet?

What is Pre-Approach?

The planning and preparation done **prior to contact** with prospect

Pre-Approach Checklist

- Who drives philanthropic decisions?
- Giving history with your organization
- Personal interests
- Passions and priorities
- Other charitable work and giving
- Connections

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

COMMUNITY SHARE

What do you and your organization do to prepare before approaching a prospect?

How has this process changed or stayed the same in the last two years?

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.

SUMMARY

- **Qualify** leads to determine their desire, financial capacity, and propensity to give.
- Planning and preparation is **essential**.
- The purpose of the pre-approach is to set a **face-to-face (or Zoom) meeting**.
- Use a script and the **6-Step Telephone Track** while you're getting comfortable on the phone.

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QUESTIONS?

Send them through Q&A!

Connect with Christa!

https://www.linkedin.com/in/christa-stoneham

THANK YOU

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CREATE IMPACT.

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