

9 Useful, Proven Strategies to Get the Major Donor Visit

**Tap into the Power of Philanthropy,
Not Fundraising**

Claire Axelrad, J.D., CFRE

Philanthropy, Not Fundraising



Fundraising

- **Money**
- Scary
- Begging
- **Yucky**
- Chore
- Necessary Evil
- **Arm Twisting**

Philanthropy

- **Loving**
- Generous
- Caring
- **Joyful**
- Helpful
- Necessary
- **Facilitating**

Who am I?

- **30+ years in-the-trenches development staff leader** helping raise millions of dollars for such organizations as San Francisco Food Bank, Jewish Family and Children's Services, San Francisco Conservatory of Music and California School of Professional Psychology. Have asked lots of people for visits and money!
- **7+ years nonprofit fundraising/marketing coach and principal Clairification School**
- **AFP Fundraiser of the Year**
- **Best Nonprofit Blog** – Fundraising Success Magazine
- **Speaker:** ADRP; ALDE; American Bar Association; Association of Fundraising Professionals; DER, Foundation Center; Fundraising Summit; Leadership Summit; NAYDO; U. S. Olympics Committee **Regular Contributor:** Bloomerang, Guidestar; Maximize Social Business; Network for Good, Nonprofit Pro

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Clairification
Philanthropy, Not Fundraising

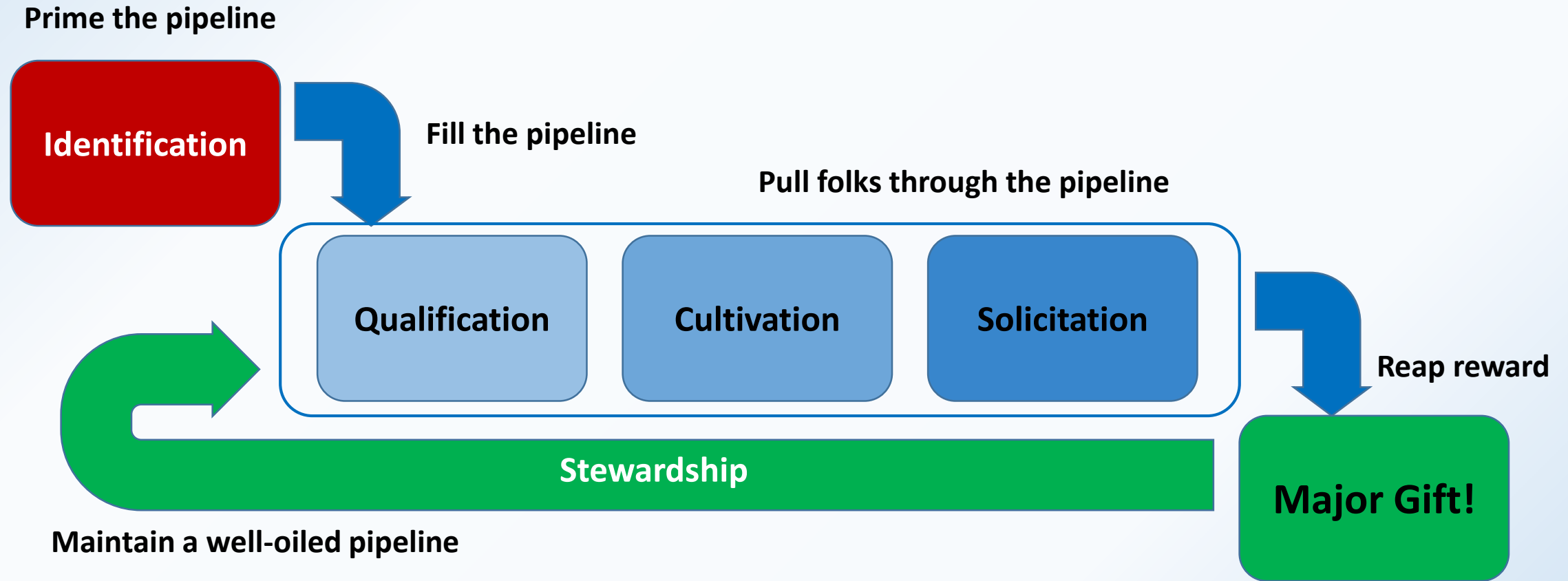
What We'll Cover

1. How to frame the visit.
2. How to initiate the conversation.
3. What to say to create good feelings.
4. How to avoid a common mistake.
5. The biggest secret that will secure the visit.
6. How to meet donor needs (and avoid bait and switch).
7. When to talk about money; when to hold back.
8. How to seal the deal.
9. The power of positivity and passion.

**Clearly
NOT a
first
date!**



Major Gifts Fundraising Pipeline



Don't Sweat the 67%

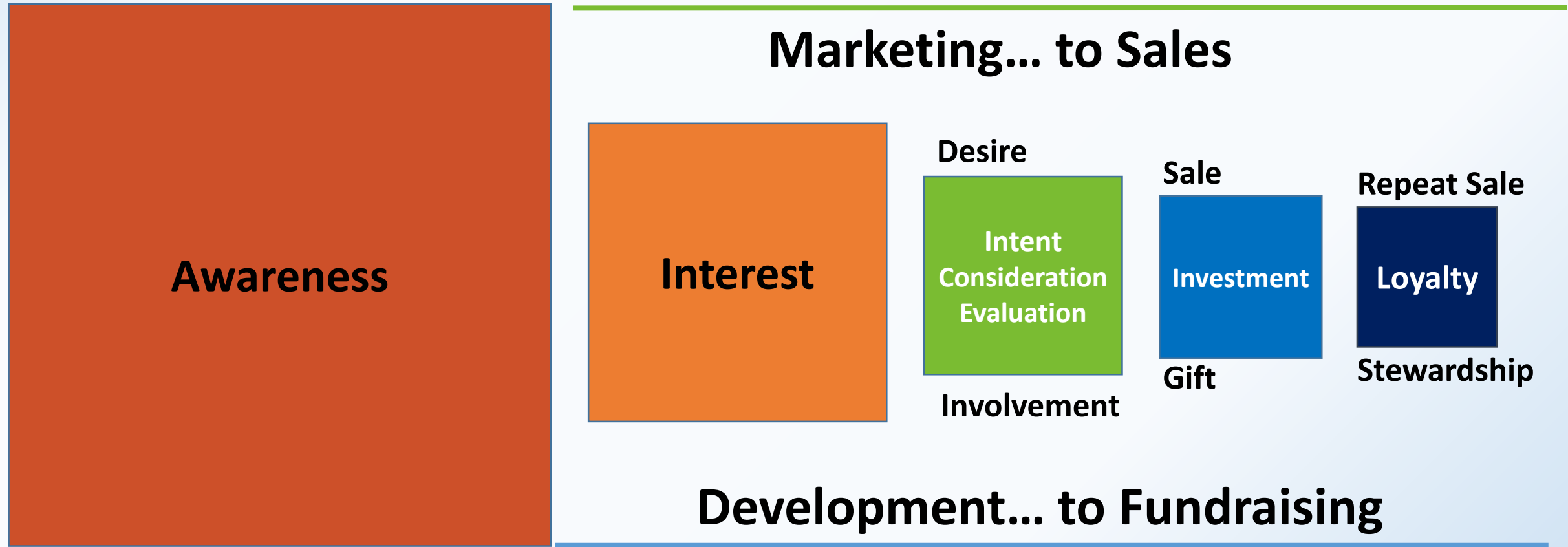
Only 33% will be receptive to your “moves.”

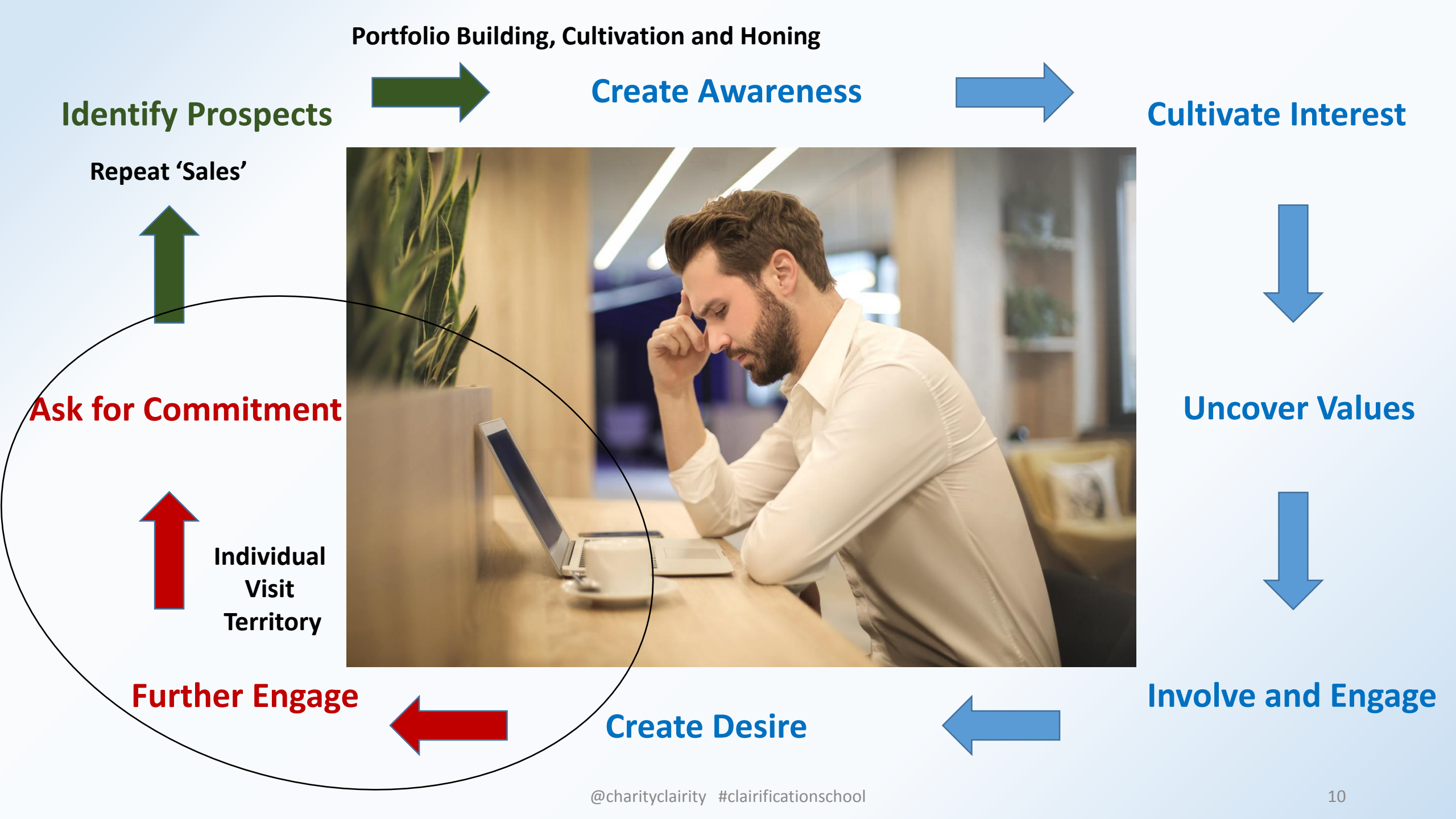
- Will this prospect be responsive?
- Do they *want* a deeper relationship with you?
- How can you find out?



Don't Knight; Invite

Traditional Marketing/Development Pipeline or Sales/Fundraising Continuum





Portfolio Building, Cultivation and Honing

Identify Prospects

Repeat Gifts



Create Awareness



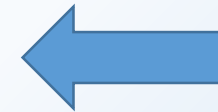
Cultivate Interest



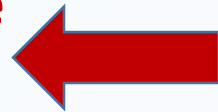
Uncover Values



Involve and Engage



Create Desire



Further Engage



Ask for Commitment

Individual
Visit
Territory



Acknowledge to Yourself this is the Hardest Part

▶ Get the Visit to Get the Gift

**“When you get the visit,
you’re 85 percent on
your way to getting the
gift.”**

-- Jerold Panas



**If you want to milk a cow,
sit by its side.**



Framing the 'Visit'

Tell prospect why you're contacting them.

- Visit, not appointment
- Advice, not solicitation
- Philanthropic interests, not needs



Visits are pleasant and something to which to look forward.

Straightforward, Polite and Personal

- Your name (not “they”)
- How you know them
- Your role with your organization (establish trust)
- Thank for past support

Hi, this is **Claire**. We **met at the Gala** last month. **I’m on the Board** and just want to **thank you** for attending and for your support. It was so great to meet you!

Listen...



Sample Script

2

Initiating the Conversation

Be considerate of their time and make it about the donor, not you.

- Are they open to your call? Ask!
- Is there something else competing for their attention right now?
Suggest a better time.
- Go with their flow, not yours.



- Be considerate of time
- Say why you've called
- Make it easy for the prospect to say "yes"
- Set it up; keep ball in your court

Do you **have a minute to talk** now? Is there **a time we could meet** for just 20 minutes? I'd love **to get your advice** on a new program we're considering. And **also to explore your philanthropic interests** this year. Your feedback would be invaluable. **What's best for you**, next Monday or Thursday?



Sample Script



Creating Good Feelings

Flattery is your friend.

- Acknowledge good deeds. Giving, volunteering, attendance, community leadership.
- Remind donors of how much they're valued.
- Thank.



Charm and gratitude go a long way.

Acknowledge their past deeds make them too important to you for you to ignore them or simply talk to them on the phone.

Remind them they're special!

You stepped up when you... **Thanks** for being a change maker. It **means a lot**. Not everyone 'gets it' and walks the talk like you do. Because **you're special**, I'd love to have a sit down with you to get your advice. It would be so helpful to get **your feedback and valuable perspective**.



Sample Script

4 Avoiding a Common Mistake



Don't ask if you can drop by to *tell* them what your organization is doing.

I'd love to come by
and **update** you on
our programs and
upcoming projects.



No need. Just
mail me
something.

I know what
you *really*
want. I
don't have
time.



5 The Biggest Secret to Get the Visit

Plan to first ask for advice.

- Can I bounce ideas off you?
- I'd value your feedback on a few things.
- May I pick your brain? You've always got creative ideas.



**If you want advice, ask for gifts.
If you want gifts, ask for advice.**

You've had a lot of experience in this area; I'd love to **bounce some ideas off you**. You've really got your ear to the ground with this constituency... **I'd value your feedback** as to best ways to approach this. We know what we need to get done, but... we're not clear on the best way to execute. You've always got creative ideas – **might I pick your brain?**



Sample Script

Meeting Donor Needs Avoid Bait and Switch

Honestly serve the donor's philanthropic interests.

- Ask for advice... *and...*
- Be clear about your intention to talk about philanthropy.



Lay your true cards on the table.
No one likes to be tricked.
No one wants their time wasted.

When we last talked about **your philanthropic interests**, you mentioned **your passion** for child mental health. I'd love to hear more about why this is important to you. Would you have about 30 minutes for me to stop by so you can **tell me more about your personal story**? I think **you might be interested in** our new anti-bullying initiative. I'd love **to tell you a few stories** too.

Sample Script



Donors need to:

- Tell their own story
- Hear stories about issues they care about
- Make the connection between their story and the new story they can help create

I'll be in your area next month and hoped we could set a time to meet. I'm happy to come to your home, or office, or wherever it's convenient for you. If you have a favorite café, I'd love to treat you to lunch or coffee. Would you have some time on the 15th or 17th to meet with me?

I'd hate to miss this opportunity to get your valuable feedback – and put a face to a name!



Sample Script

7 When to Talk about Money

Not now. Not yet.

- Save money talk for in-person visit.
- On call, say you want advice and feedback. Talk about what *grows* from philanthropy.
- If they say they don't want to talk about money, promise you won't.



Reassure them this is *their* time to ask questions, not yours.

I'd love to take you for coffee and have a visit to learn more about **your story** and about your **areas of interest**.

Sample Script
to avoid
common
hesitations

"I don't have money to give..."

"I'll give, so you don't need to spend time with me..."

"I don't want to talk about..."

"Would love to meet, but going on vacation..."

"I'm too busy to meet..."

No worries. I'm not going to ask for money. I want to talk about the issues you find most pressing. And get feedback about what **solutions you think we should be working towards** right now.



Sealing the Deal

Offer a couple of choices for the timing of the visit.

- Don't let them tell you they'll "think about it" and get back to you.
- Keep the ball in your court.



**Avoid asking for "yes" or "no."
Offer concrete options.**

**Are you generally
better in the
morning, afternoon
or evening? I'm at
your convenience!**

**What's better for
you, Tuesday or
Friday?**

**Can I email your
assistant, and we can
find a time that
works for you?**



Sample Script

● BONUS TIP: The 'Right' Person to Ask

Hardest to Say 'No' To Person

- Important
- Authoritative
- Credible
- Friendly

Person with Best Relationship

- Friend, family, colleague
- Worked with them in past
- Helped them in past




9 The Power of Positivity and Passion

Smile, stand up and walk around.

- Smiling, standing and moving helps to convey enthusiasm in your speech.
- People like to talk to people who sound happy.



SMILE AND DIAL

A large, weathered log lies horizontally across the foreground, its surface showing deep grooves and textures from age and exposure. Behind it, another log is propped up at an angle. The background is filled with lush green foliage and trees, suggesting a forest or park environment. The ground is a mix of dirt and grass.

If a smile widens on a
phone call, and no
one is there to see it,
does it make a
sound?

*How you say something can be more
important than *what* you say.*

Over the phone, tone of voice is 84% of the message



Go the extra smile!

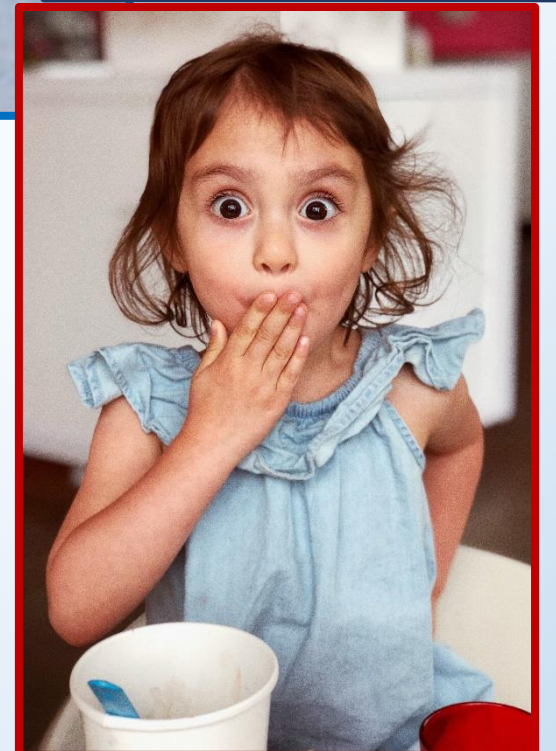
Dr. Amy Drahota, University of Portsmouth, 2008

<https://www.sciencedaily.com/releases/2008/01/080111224745.htm>

Smile and the World Smiles With You

Tips to Help You Smile:

- Pretend you're in the room together.
- Keep a funny picture near your phone.
- Keep a beautiful picture of a child by the phone.
- Keep a mirror next to your phone.



Q U E S T I O N S ? ? ?

I have found that among its other benefits, giving liberates the soul of the giver.”

—Maya Angelou



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**Philanthropy, not fundraising.
Passionate, not forgettable.
A journey, not a destination.**

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