

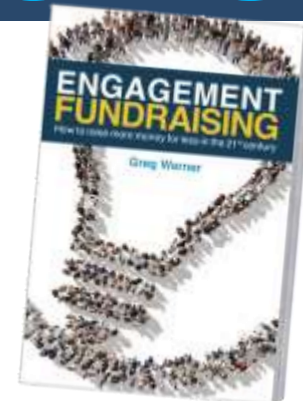
HOW TO LAND APPOINTMENTS with more MAJOR GIFT & LEGACY GIFT DONOR PROSPECTS



CEO & Founder

market  smart

Author of
Engagement Fundraising



Who is this guy?

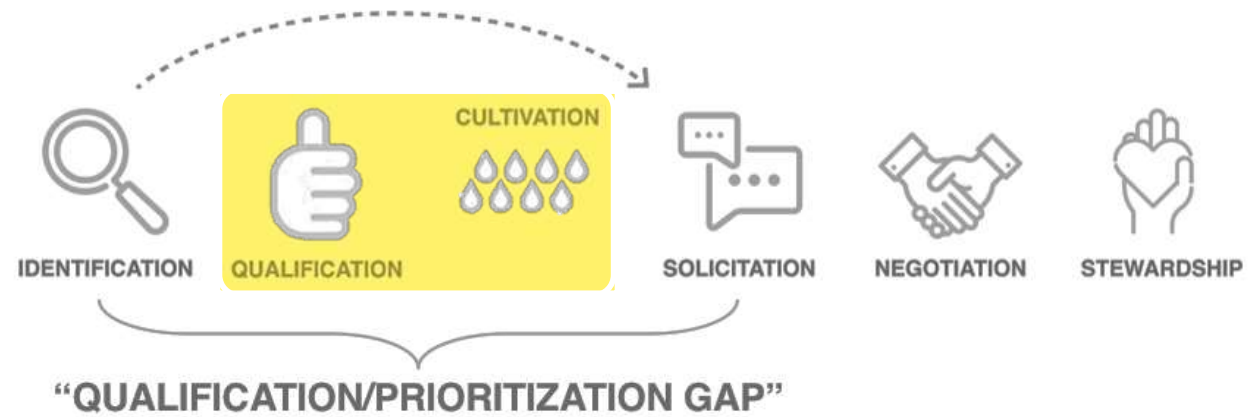


Ticked off **donor**
Changed my **business**
Wrote a **book**

30,000



Who is this guy?



How to land APPOINTMENTS MAJOR GIFT & LEGACY GIFT DONOR PROSPECTS

Who is this guy?



Major & legacy gift FUNDRAISING CHALLENGES

EMPATHY

Lack of **time**

Not enough **staff**

Tight **budgets**

Travel is time-consuming and expensive

Qualifying prospects is very difficult

Getting an appointment is nearly impossible



“It’s harder to get an appointment than to secure a gift.”

“Getting an appointment is 85% of getting the gift.”

Major & legacy gift FUNDRAISING CHALLENGES

EMPATHY

Challenges according to fundraisers:

- 52%** Supporters **don't respond to outreach**
- 18%** Supporters say: **"I'll give, don't need a visit"**
- 14%** Supporters **keep delaying the visit**
- 16%** I'm not sure **what to say when I reach out**

SUPPORTER
DOESN'T
TRUST
YOU

SUPPORTER
DOESN'T SEE
WHAT **VALUE**
YOU PROVIDE

YOU FAILED
TO **PREPARE**
FOR THE
CALL

THE ORGANIZATION FAILED TO TRAIN ITS STAFF



Major & legacy gift FUNDRAISING CHALLENGES

EMPATHY

Leadership may **pressure you to get results quickly**

Lack of understanding of:

- ✓ The **donor's consideration process**
- ✓ The fact that donors love the mission, but are **afraid of fundraisers**

SUPPORTER
DOESN'T
TRUST
YOU

SUPPORTER
DOESN'T SEE
WHAT **VALUE**
YOU PROVIDE

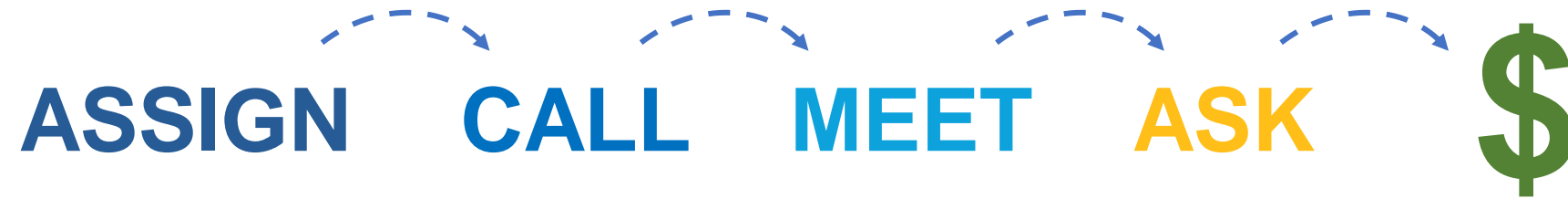
YOU FAILED
TO **PREPARE**
FOR THE
CALL

THE ORGANIZATION FAILED TO TRAIN ITS STAFF

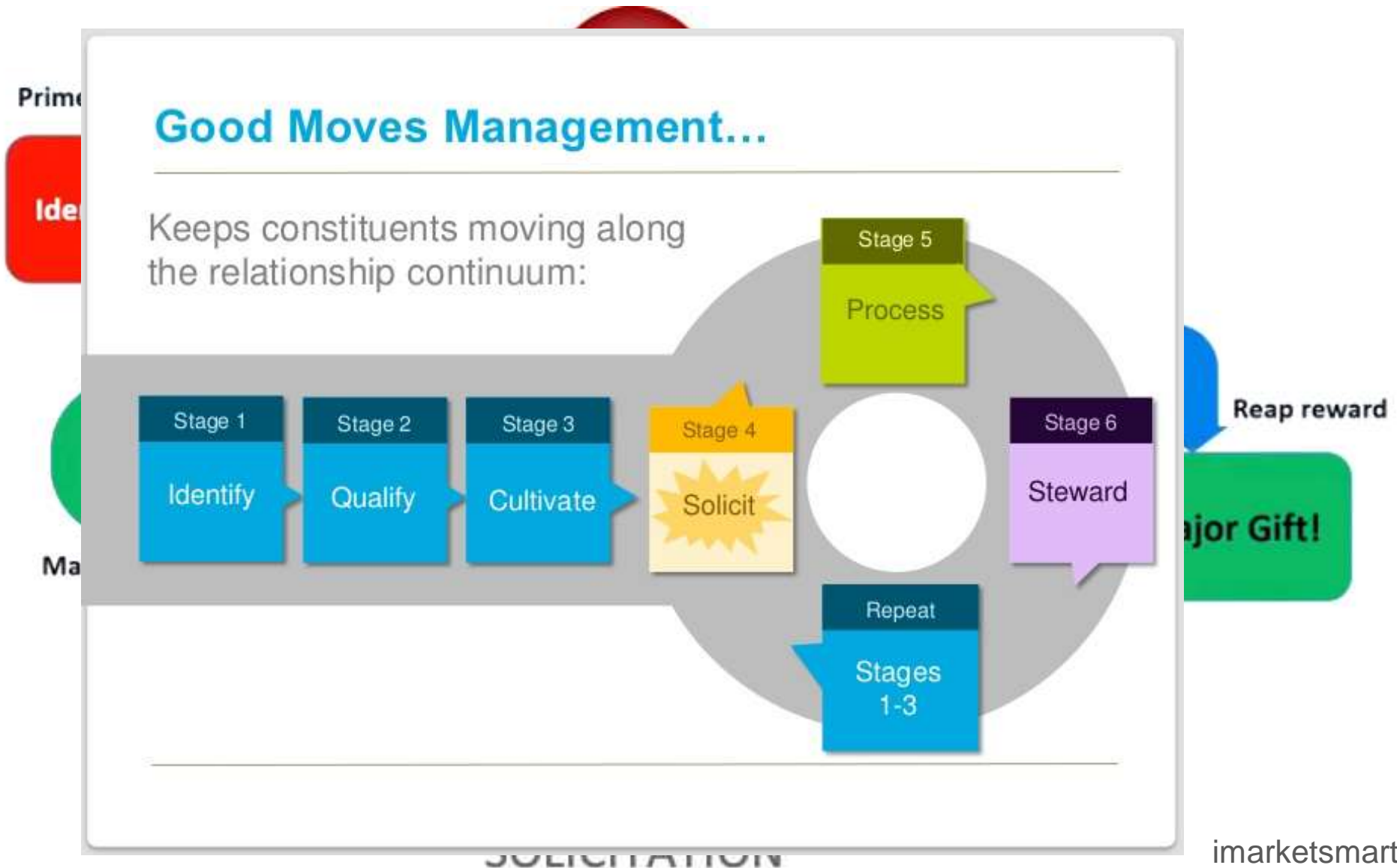


YOUR MAJOR OR LEGACY GIFT DONOR PROSPECT'S CONSIDERATION PROCESS

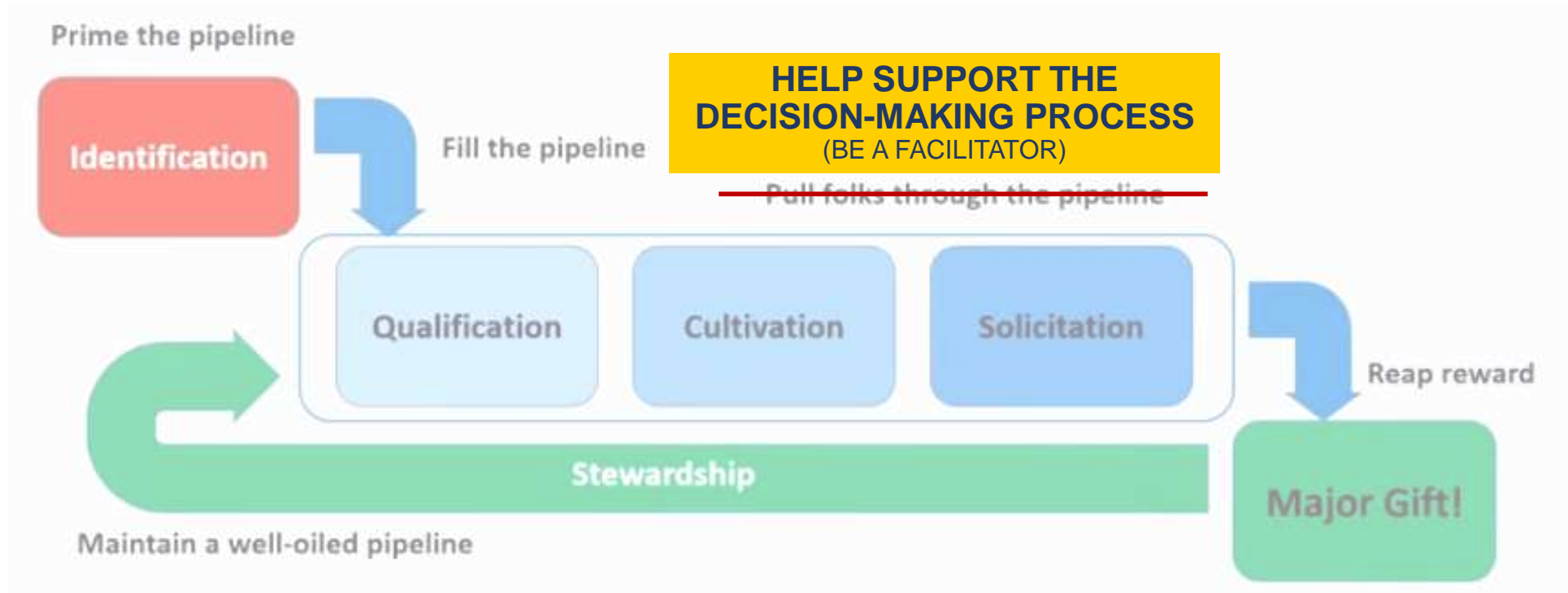
YOUR MAJOR OR LEGACY GIFT DONOR PROSPECT'S **CONSIDERATION PROCESS**



YOUR MAJOR OR LEGACY GIFT DONOR PROSPECT'S CONSIDERATION PROCESS



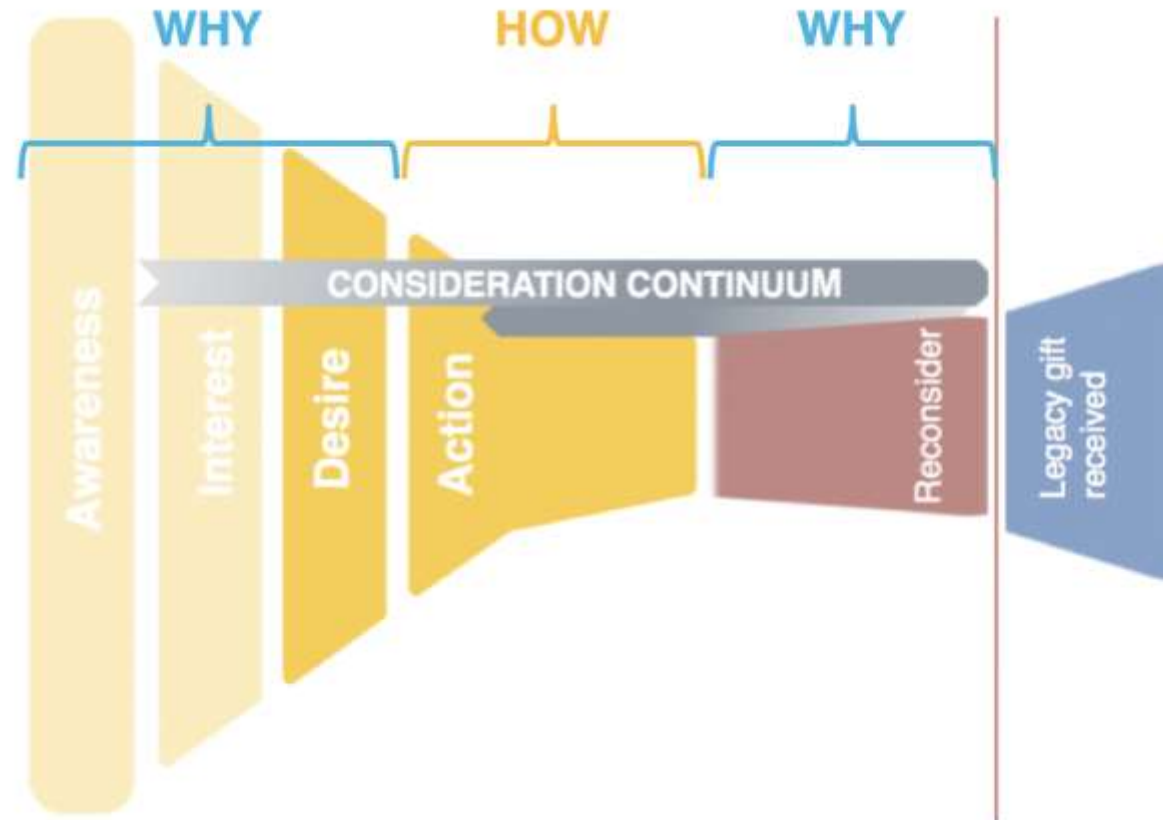
YOUR MAJOR OR LEGACY GIFT DONOR PROSPECT'S CONSIDERATION PROCESS



YOUR MAJOR OR LEGACY GIFT DONOR PROSPECT'S **CONSIDERATION PROCESS**



HIGHLY-CONSIDERED DECISION
NOT A TRANSACTIONAL OR IMPLULSE DECISION



TACTICS

10 TIPS

TACTICS

1

ADJUST YOUR MINDSET

YOU ARE NOT:

- ✓ A BEGGAR
- ✓ A MANIPULATOR
- ✓ AN ARM TWISTER



TACTICS

1

ADJUST YOUR MINDSET

INSTEAD, YOU ARE A:

- ✓ LOVING
- ✓ CARING
- ✓ HELPFUL
- ✓ GENEROUS
- ✓ JOYFUL...

A VALUE
CREATOR &
FACILITATOR



TACTICS

1

ADJUST YOUR MINDSET



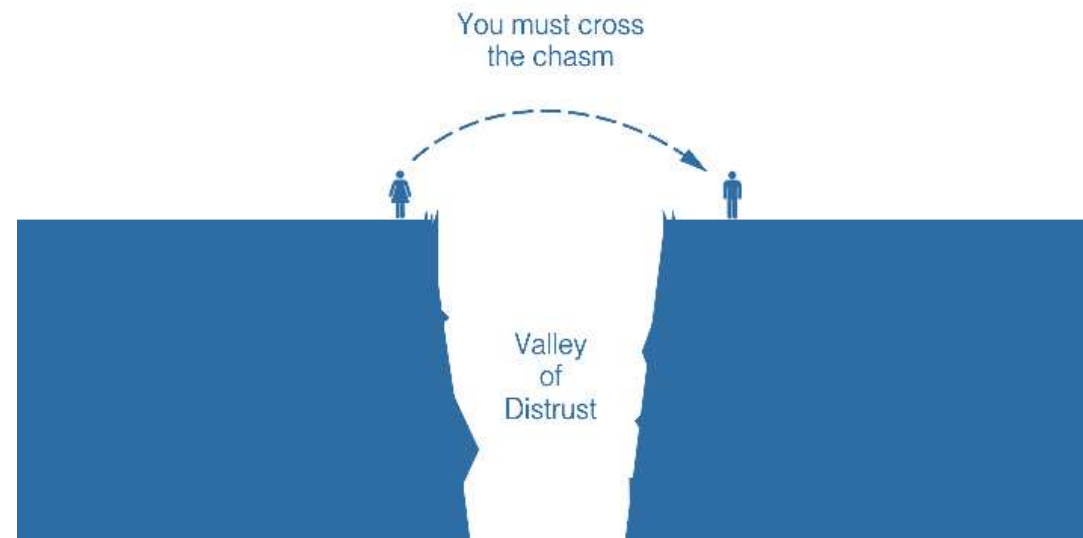
**A VALUE
CREATOR &
FACILITATOR**



TACTICS

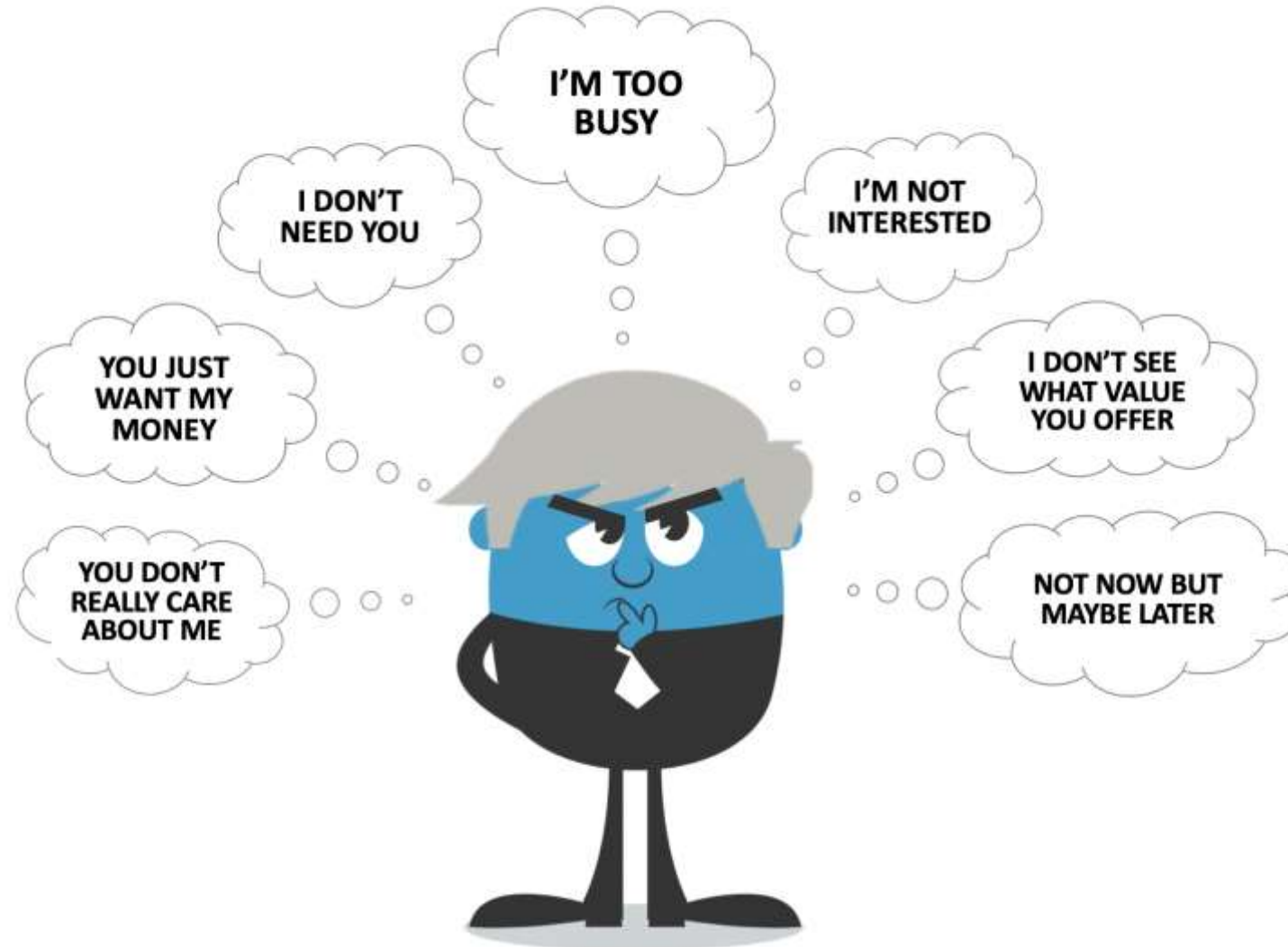
2

RECOGNIZE THE EXISTENCE OF THE VALLEY OF DISTRUST



TACTICS

2



TACTICS

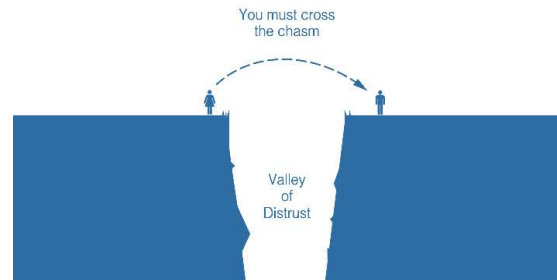
2



TACTICS

3

BUY INTO AN ENGAGEMENT CALLING PROCESS



MANDATORY:

- ✓ AT LEAST **TWO CONVERSATIONS*** BEFORE ASKING FOR A MEETING
- ✓ DON'T ASK, OFFER TO **PROVIDE VALUE**

TACTICS

3

BUY INTO AN ENGAGEMENT CALLING PROCESS

HOW TO PROVIDE VALUE



TACTICS

3

HOW TO PROVIDE VALUE



IDENTIFICATION

- ✓ CONDUCT
PROSPECT
~~IDENTIFICATION~~
QUALIFICATION
RESEARCH



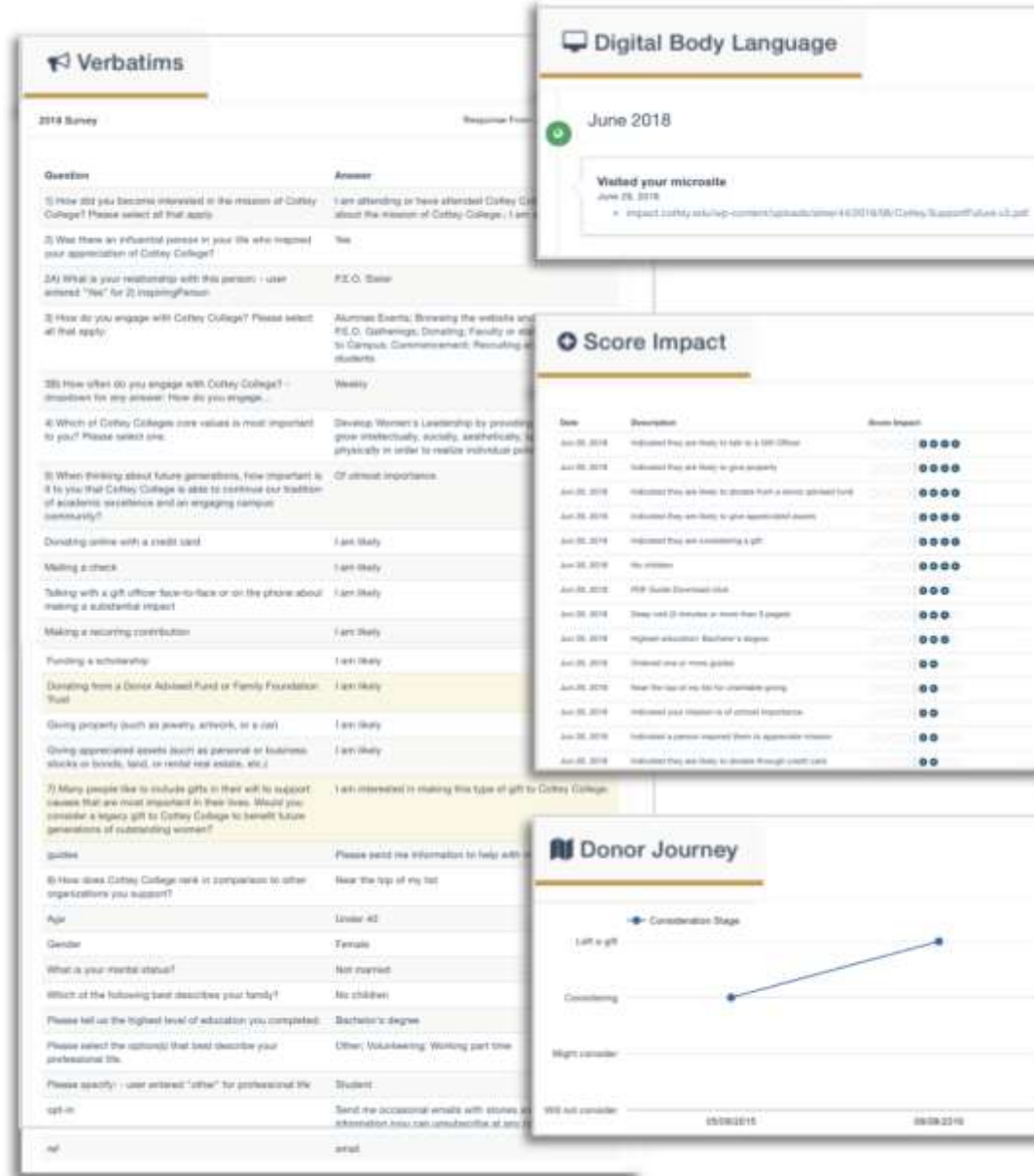
QUALIFICATION

- ✓ GAIN EMPATHY
- ✓ THINK / ALIGN



TACTICS

WHAT
THEY SAY



WHAT
THEY DO



TACTICS

- ✓ Age: 70 - 80
- ✓ No children
- ✓ Met her husband thanks to your employer
- ✓ Top choice for giving
- ✓ Mission is of utmost importance
- ✓ Likely to give assets
- ✓ Might consider a legacy gift
- ✓ Interested in funding a scholarship




REGENCY IS THE KEY TO SUCCESS

●	8/22/20	1,090		Might consider	Likely
---	---------	-------	--	----------------	--------

TOOK SURVEY:
January 2018

**RECENT
ENGAGEMENT:**
LAST SATURDAY



Drip email engagement
Subject line: *6 ways you could benefit*

- Aug 22 at 5:01 AM: Email Opened
- Aug 9 at 12:36 AM: Email Opened
- Aug 8 at 4:00 PM: Email Delivered

[View Full Report](#)

+700%

James B. Oldroyd, Kristina McElheran, and David Elkington, "The Short Life of Online Sales Leads," **Harvard Business Review**



TACTICS

3

HOW TO PROVIDE VALUE

THINK!

What can I offer or do
to make them
feel good?

TACTICS

35 AMAZING WAYS TO ENGAGE AND INVOLVE YOUR DONORS AND SUPPORTERS

- 1 Surveys
- 2 Quizzes
- 3 Invitations to join a board or committee
- 4 Games
- 5 Polls
- 6 Videos
- 7 Advocacy or activism opportunities
- 8 Podcasts
- 9 Testimonials
- 10 Online chat tools
- 11 Webinars
- 12 Streaming live events
- 13 Question and answer sessions
- 14 Tell your story opportunities
- 15 Infographics
- 16 Reports or eBooks
- 17 Workbooks
- 18 Blogs (make sure you have a spot for comments)
- 19 Sharing tools
- 20 Matching campaigns
- 21 Sponsorship opportunities (such as sponsoring a child)
- 22 Scholarships
- 23 Naming opportunities
- 24 Contests
- 25 Calculators
- 26 Group activities (such as building a playground)
- 27 Crowdfunding
- 28 Events (dinners, golf tournaments, 5k races, etc.)
- 29 Ask for advice or critiques
- 30 Maps (for example: cleanest rivers for fishing)
- 31 Tours or show-and-tell sessions
- 32 Presentations of scientific research findings
- 33 Mentoring opportunities
- 34 One-to-one interactions with beneficiaries of donations
- 35 And, of course, volunteering opportunities



TACTICS



"This stuff really works!"

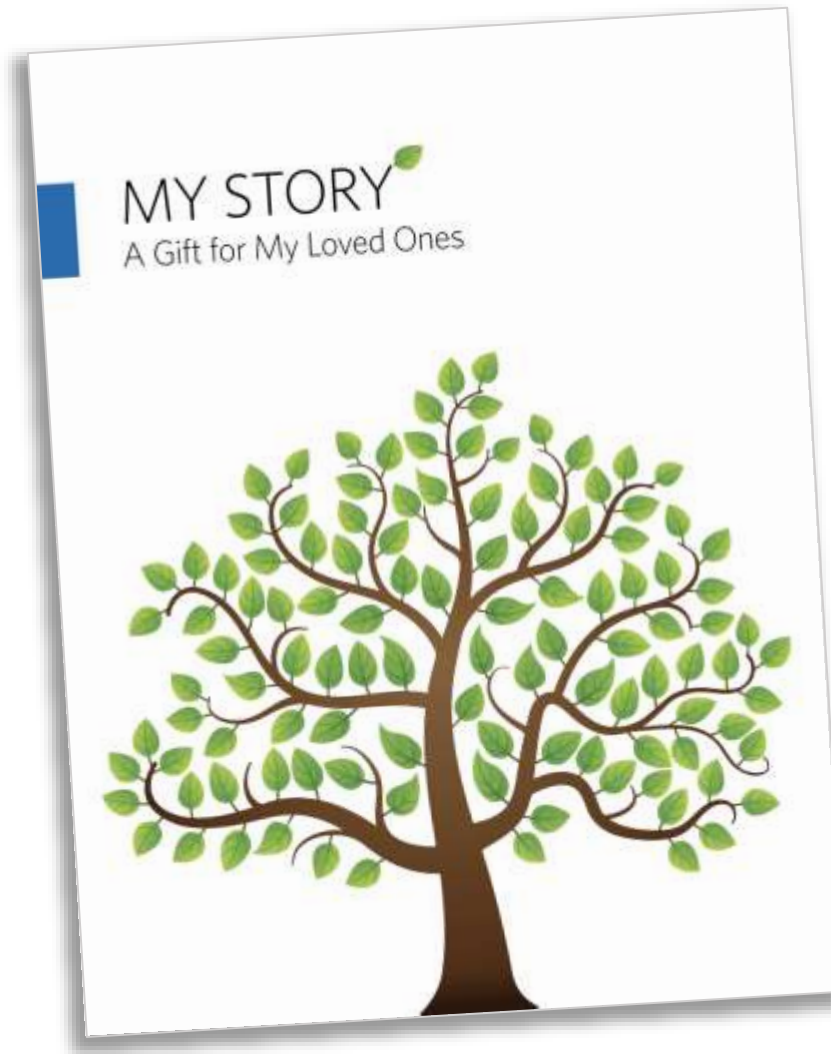
Is Your Engagement Offer Worthwhile?

DONOR OFFER VALUE CHECKLIST

- ☐ Is it fun?
- ☐ Is it fair?
- ☐ Are you being honest and transparent?
- ☐ Will it educate or inform them?
- ☐ Is it sharable?
- ☐ Does it evoke emotion?
- ☐ Does it release dopamine and/or oxytocin (make them feel good)?
- ☐ Does it help them feel like they are the hero in their own life story (provide feelings of autobiographical heroism)?
- ☐ Does it give them a sense that they can live forever in the minds of others (provide feelings of symbolic immortality)?
- ☐ Does it enable them to give back or pay it forward to others?
- ☐ Does it allow them to feel that they are being altruistic?
- ☐ Does it provide a sense of community (a connection with others)?
- ☐ Does it give them notoriety and/or praise?
- ☐ Does it enable them to right some wrongs they want to change in our society?
- ☐ Does it give them a feeling that they are being religious or that they may be able to satisfy their religious dictates?



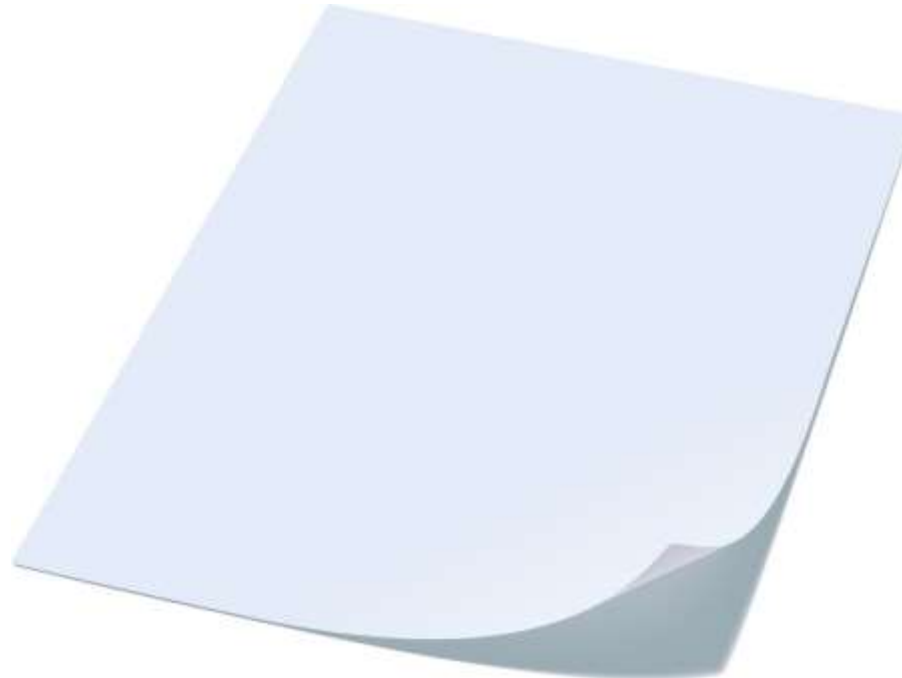
TACTICS



TACTICS

4

PRACTICE YOUR DIALOGUE



TACTICS

4

PRACTICE YOUR DIALOGUE



Gong.io
The better
conversation
company

90,340 sales
conversations
studied

OPENING LINES:

“Did I catch you at a bad time?”

40% LESS
LIKELY TO BOOK A MEETING

“How are you?”

340% MORE
LIKELY TO BOOK A MEETING

“The reason for my call is...”

210% MORE
LIKELY TO BOOK A MEETING

“How have you been?”

660% MORE
LIKELY TO BOOK A MEETING



TACTICS

4

PRACTICE YOUR DIALOGUE



OTHER TIPS:

Flatter 'em

Show 'em that you know 'em

Be relevant

Be emotional

Be enthusiastic



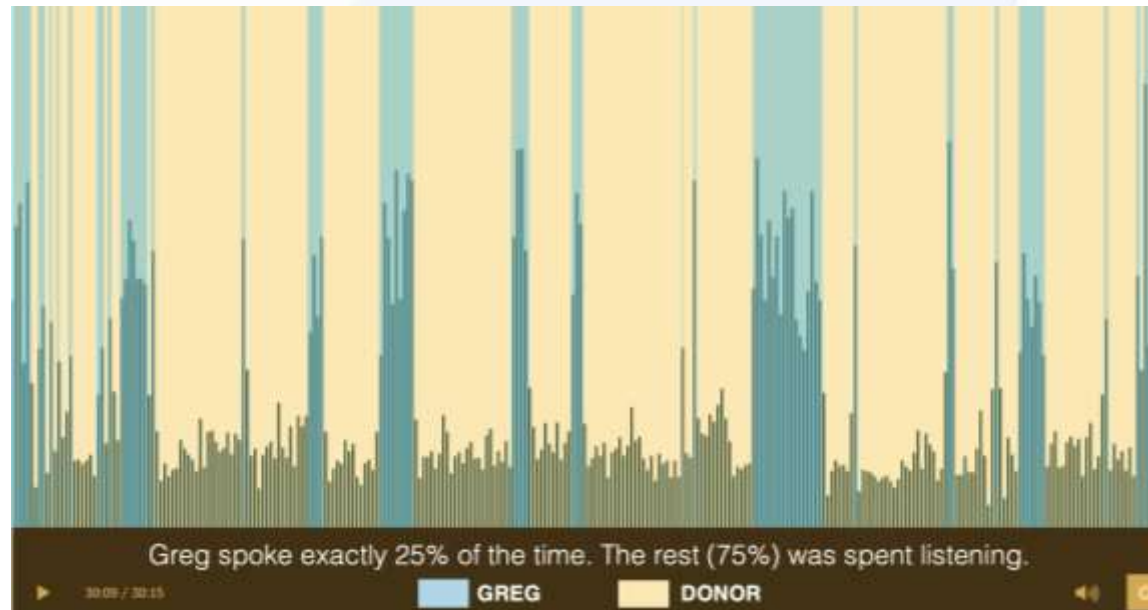
TACTICS

4

PRACTICE YOUR DIALOGUE



ASK QUESTIONS | LISTEN 75% OF THE TIME



TACTICS

=

YOU'RE READY!



TACTICS

5

GIVE THEM POWER



PUSHINESS BACKFIRES

“I’m not calling to ask you for a donation”

“You can end the call any time”

“It’s completely up to you”

“I really don’t want you to feel pressured”

“Let’s pencil-this-into your calendar”



TACTICS

5

**GIVE THEM
POWER**



**ASK TONS OF QUESTIONS
AND LISTEN TO THE ANSWERS**
SHOW THAT YOU CARE

TACTICS

6

BE CLEAR, THEN SHUT UP!

MAKE THEM
FEEL GOOD



PRESENT THE VALUE
THEY'LL GAIN FROM
MEETING WITH YOU



ASK FOR THE
MEETING AND
SHUT UP!
COUNT TO 10



TACTICS

6

BE CLEAR, THEN SHUT UP!

EXAMPLES

- ~~1. COLD ASK (FIRST CALL)~~
2. WARM ASK (AFTER ENGAGEMENT CALLS)



TACTICS

6

BE CLEAR, THEN SHUT UP!

"I'll be in your area visiting with another supporter so I was hoping we could get together on Tuesday at 3 pm or would another time work better for you?"



TACTICS

6

BE CLEAR, THEN SHUT UP!

“Could we get together on Tuesday at 3 pm or would another time work better for you?”



TACTICS

6

BE CLEAR, THEN SHUT UP!

“Could we pencil in a time to meet so I can learn how best to serve your needs?”



TACTICS

6

BE CLEAR, THEN SHUT UP!

“[Name], what’s the best way to get on your calendar?”



TACTICS

6

BE CLEAR, THEN SHUT UP!

“[Name], during our last conversation you mentioned xy&z. It would be great to learn more about your thoughts on that. How about we get together on Wednesday or Thursday, ok?”



TACTICS

6

BE CLEAR, THEN SHUT UP!

“Why don’t we get together so you can learn more? What does your schedule look like next week?”



TACTICS

6

BE CLEAR, THEN SHUT UP!

“[Name], your story is fascinating. It would be great to learn more about you and your interests so I can work on your behalf to help you get more out of your relationship with our shared mission. Why don’t we get together next week, perhaps on Tuesday? What do you say?”



TACTICS

6

BE CLEAR, THEN SHUT UP!

“[Name], your support has been so wonderful. It really means a lot. Not everyone ‘gets it’ like you do. That’s why I wonder if you would consider giving us some feedback and advice on xy&z. It would be invaluable. Can we get together either next Tuesday or Thursday?”



TACTICS

6

BE CLEAR, THEN SHUT UP!

“It would be great to learn more about you. If we were to meet, I might be able to help you get even more joy out of your relationship with our cause. What would your thoughts be about getting together to have an initial meeting?”



TACTICS

6

BE CLEAR, THEN SHUT UP!

“If I could help you find more meaning in your life through your involvement with our shared cause, what are your thoughts on getting together in person?”



TACTICS

6

BE CLEAR, THEN SHUT UP!

“[Name], did you know that I can help you learn more about that? But we’d need to set aside some time for a deeper dive into it. Is there any reason you wouldn’t want to open up your calendar so we can set up a meeting?”



TACTICS

6

BE CLEAR, THEN SHUT UP!

MAKE THEM
FEEL GOOD



PRESENT THE VALUE
THEY'LL GAIN FROM
MEETING WITH YOU



ASK FOR THE
MEETING AND
SHUT UP!
COUNT TO 10



TACTICS

6

BE CLEAR, THEN SHUT UP!

DO NOT SAY:

“I’d like to *update you*
on what we’re doing.”



TACTICS

6

**BE CLEAR, THEN
SHUT UP!**

CONSIDER THE ALTERNATE CLOSE

“Are mornings better for you **or** do you prefer afternoons?”

“Is Tuesday good **or** how about Thursday?”



TACTICS

7

LEAVE VOICEMAIL



RADIO AD MESSAGES

- ✓ Offer to provide value
 - ✓ Flatter 'em
 - ✓ Show 'em that you know 'em
 - ✓ Be relevant
 - ✓ Be emotional
 - ✓ Be enthusiastic

TACTICS

8

CONSIDER LINKEDIN

How to reach out to a major or legacy gift prospect online



Networking is best done virtually these days. With over 260 million users, LinkedIn is powerful, cost-efficient, and effective. Plus it works much better than cold calling and spamming with email with scripts.

GET CONNECTED

- ✓ You **MUST complete your profile** (for credibility, be sure to add a photo or people will wonder why you left that empty)
- ✓ **Build your network** by Linking with anyone and everyone who cares about your mission (upload your address book and let the magic happen)
- ✓ After you have built your network, look up your major gift prospects on LinkedIn to **see if you have any first degree connections in-common**
- ✓ Reach out to those first degree connections and **ask them to introduce you** to your prospects
- ✓ Even if you do not have a first degree connection, you can still **send a direct InMail** if you have a Premium Account or if your prospect is an Open Link Member

SEND THAT FIRST INMAIL

- ✓ **Personalize the InMail** to prove the message is not spam (mention your shared connection and interest in your mission)
- ✓ Use words the recipient wants to hear to **spark interest**
- ✓ **Ask a question** in an effort to get a response (this is very effective because it is a call-to-action)
- ✓ Try asking for a **specific decision** to be made (such as "Can we please arrange a time to talk for just 2 or 3 minutes?")
- ✓ Make it **just 3 to 5 sentences**—maximum (people just don't have time to read long-winded messages)

BONUS IDEA: TRY THE LOOKIE-LOU

- ✓ **Take a peek** at a prospect's profile (certain percentage will, in turn, take a look at your profile)
 - ✓ Then **send your first InMail**
- This works because now the prospect is receiving your InMail after already determining that you have a shared interest— your mission!



market**smart**

www.imarketsmart.com



TACTICS

9

COUNT YOUR FAILURES AS SUCCESSSES



DISQUALIFY

NO = NOT NOW

TACTICS

10

LEVERAGE REFERRALS



REVIEW

Adjust your mindset
Valley of distrust
Employ engagement calling
Provide value
Practice your dialogue
Give them power
Ask: be clear & shut up
Leave voicemail
Consider LinkedIn
Count failures
Leverage referrals

**QUALIFIED APPOINTMENTS
WILL ALMOST SET THEMSELVES**



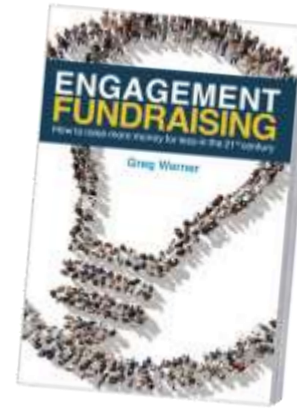
THANK YOU



GREG WARNER
CEO & Founder
info@imarketsmart.com



imarketsmart.com



engagementfundraisingbook.com

EXTRAS

15 DO'S AND DON'T'S OF TELEPHONE CALLS FOR MAJOR AND LEGACY GIFT FUNDRAISERS

15 DO'S

1. Be straightforward. Identify the the reason(s) for your call.
2. Ask great open-ended questions that encourage dialogue and show that you are sincerely interested and care about that particular person.
3. Listen. Your supporters want to be heard. If you do it right, they'll talk at least twice as much as you. Hopefully more.
4. Your mission is worthy so smile and be confident. It radiates through the phone line. I'm not kidding. People can sense how you feel right through the phone line.
5. Be honest always! You WILL get found out if you lie or tell half-truths.
6. Test everything. For instance, what opening lines work better than others.
7. Keep a pen and paper nearby so you can take notes. You simply won't remember each call.
8. Match your energy level and tone with that of your supporter's. Be a chameleon.
9. If you made any kind of promise during the call, be sure you do what you said you were 'gonna do.
10. Send personalized, relevant follow-up emails to those who want more information or appointment confirmations to those who agreed to meet.
11. Be loose. Shmooze a bit. You can't read a script if you really want to engage your supporters. Instead, tell stories.
12. Be a team player. Let others in your organization know what you are doing (especially if you are outsourcing the calls to a vendor).

13. Treat people how THEY would like to be treated.. Especially as you develop your calling strategy.
14. Use technology to be more efficient (such as CRM, auto-dialing click widgets, etc.).
15. Most of all, employ telemarketing as part of an integrated approach that complements other marketing activities— not as a solo, one-shot effort.

15 DON'T'S

1. Be disingenuous. For instance, don't apologize for calling. You're not sorry and your prospect knows you it. Similarly, don't lie about anything. You will be found out. If you don't know the answer to a question, be honest about it and then promise to find out and call them back with an answer.
2. Be afraid to change your approach and message if it isn't working.
3. Interrupt your supporter when they are talking. It is a clear indication that you don't care about what they have to say.
4. Forget the specific, strategic reason for your call (unless you failed to devise a strategy in the first place). Stay on track. Aim to achieve the goal you originally set.
5. Read a script word for word.
6. Forget to address the person by name (but only after asking for permission to do so first). Then don't overuse their name. That will sound tacky.
7. Prejudge. You never know which call might turn into a fantastic opportunity for you and your supporter.
8. Type while you or they are talking. In fact, don't type at all. Use a pen. They can hear you!
9. Stuff pauses with "like", "um" and "er".
10. Use jargon your supporter won't understand. They are not involved in your organization's mission day in and day out the way you are and they'll feel stupid.
11. Worry too much about failure. Most people will become more engaged with your mission thanks to your outreach. But some might actually become less engaged. You can't worry about the possibility of failure. The positives gained will surely outweigh any negatives. And, besides, if you do nothing, you'll fail for sure.
12. Talk over your prospect – it shows you aren't listening.
13. Allow any background noise when you are calling. It's disrespectful. If you are nearby other callers make sure it doesn't sound like you are in a call center on the other end of the line. Your supporter will feel like a piece of meat.
14. Argue or debate with your supporter. Look for ways to agree not disagree.
15. Underestimate the power telemarketing to build better relationships with your supporters.

market  smart

www.imarketsmart.com



EXTRAS

35 AMAZING WAYS TO ENGAGE AND INVOLVE YOUR DONORS AND SUPPORTERS

- 1 Surveys
- 2 Quizzes
- 3 Invitations to join a board or committee
- 4 Games
- 5 Polls
- 6 Videos
- 7 Advocacy or activism opportunities
- 8 Podcasts
- 9 Testimonials
- 10 Online chat tools
- 11 Webinars
- 12 Streaming live events
- 13 Question and answer sessions
- 14 Tell your story opportunities
- 15 Infographics
- 16 Reports or eBooks
- 17 Workbooks
- 18 Blogs (make sure you have a spot for comments)
- 19 Sharing tools
- 20 Matching campaigns
- 21 Sponsorship opportunities (such as sponsoring a child)
- 22 Scholarships
- 23 Naming opportunities
- 24 Contests
- 25 Calculators
- 26 Group activities (such as building a playground)
- 27 Crowdfunding
- 28 Events (dinners, golf tournaments, 5k races, etc.)
- 29 Ask for advice or critiques
- 30 Maps (for example: cleanest rivers for fishing)
- 31 Tours or show-and-tell sessions
- 32 Presentations of scientific research findings
- 33 Mentoring opportunities
- 34 One-to-one interactions with beneficiaries of donations
- 35 And, of course, volunteering opportunities

EXTRAS



"This stuff really works!"

Is Your Engagement Offer Worthwhile?

DONOR OFFER VALUE CHECKLIST

- ☐ Is it fun?
- ☐ Is it fair?
- ☐ Are you being honest and transparent?
- ☐ Will it educate or inform them?
- ☐ Is it sharable?
- ☐ Does it evoke emotion?
- ☐ Does it release dopamine and/or oxytocin (make them feel good)?
- ☐ Does it help them feel like they are the hero in their own life story (provide feelings of autobiographical heroism)?
- ☐ Does it give them a sense that they can live forever in the minds of others (provide feelings of symbolic immortality)?
- ☐ Does it enable them to give back or pay it forward to others?
- ☐ Does it allow them to feel that they are being altruistic?
- ☐ Does it provide a sense of community (a connection with others)?
- ☐ Does it give them notoriety and/or praise?
- ☐ Does it enable them to right some wrongs they want to change in our society?
- ☐ Does it give them a feeling that they are being religious or that they may be able to satisfy their religious dictates?

If your offer for engagement doesn't provide value to your donor, don't use it!



EXTRAS

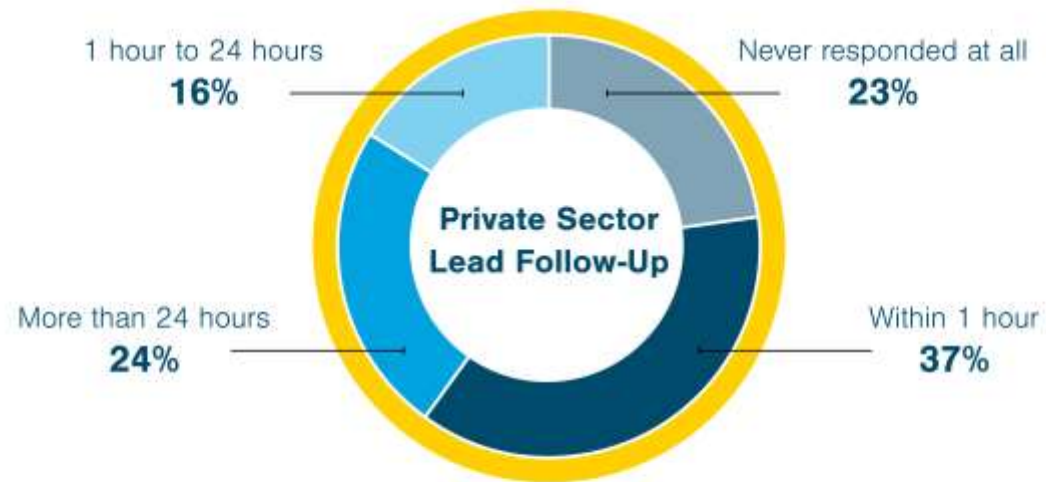
TOP 10 REASONS WHY DONORS SAY “NO”

- 1 They **didn't trust you** or your organization to get the job done on their behalf
- 2 They felt your proposal **didn't meet their needs**
- 3 They felt you asked for **too much**
- 4 They felt you asked for **too little**
- 5 Your **timing** was off
- 6 Your personality and theirs **didn't jive**
- 7 They still didn't know **what you did with their last gift**
- 8 They had **someone else** holding up or blocking the process
- 9 They simply **weren't interested** in your mission anymore
- 10 They were interested in the mission but **gave to another organization**



EXTRAS

DO YOU FOLLOW-UP ON YOUR LEADS FAST ENOUGH?



Source: Harvard Business Review study titled "The Short Life of Online Sales Leads"

EXTRAS

WHY PEOPLE REALLY GIVE

Giving produces a warm glow
Giving lifts them up and makes them feel alive
Giving sets their heart on fire
Giving ignites their emotions
Giving provides them with spiritual sensation
Giving supports the practice of their religion
Giving provides them with a sense of community
Giving brings them closer to others
Giving makes them famous (sometimes)
Giving provides them with notoriety
Giving allows them to right wrongs
Giving enables them to "give back"
Giving brings them perks or tax benefits
Giving allays their guilt or heals their pain
Giving makes them feel like a hero in their own life story
Giving supports their pursuit of meaning in their lives
Giving enables them to honor or memorialize someone
Giving allows them to feel like they will leave a legacy

Giving makes them feel good

WHY PEOPLE REALLY STOP GIVING

They felt the organization did something wrong
They were unsure about how their donation was used
They felt their donation was not used properly
They were unsure if their contribution made a difference
They felt mistreated by the organization
They lost interest in the organization's mission
They felt like they already gave enough
They thought the organization could not solve the problem
The organization spelled their name incorrectly
Their financial situation changed
They felt unappreciated
They simply forgot about the organization
They felt they were asked for too much money
They found a different organization that better suited their needs

They no longer felt good in one way or another



EXTRAS

IT AIN'T
ABOUT
YOU