

Rachel
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GET THE VISIT, NAIL THE ASK!

10 WAYS TO GET THE VISIT

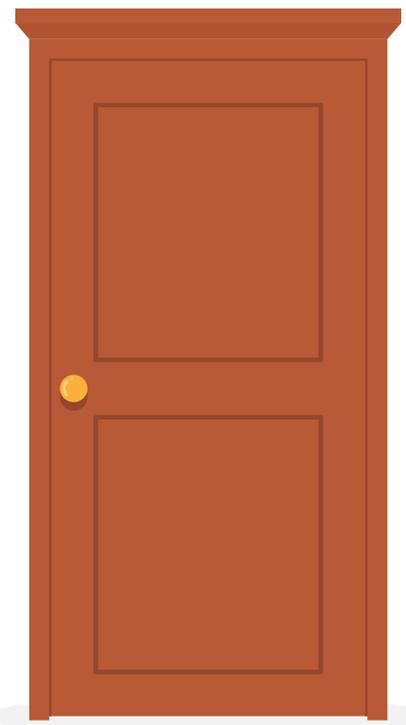


PLUS BONUS SCRIPTS TO ASK FOR A GIFT

10 APPROACHES TO GETTING THE VISIT

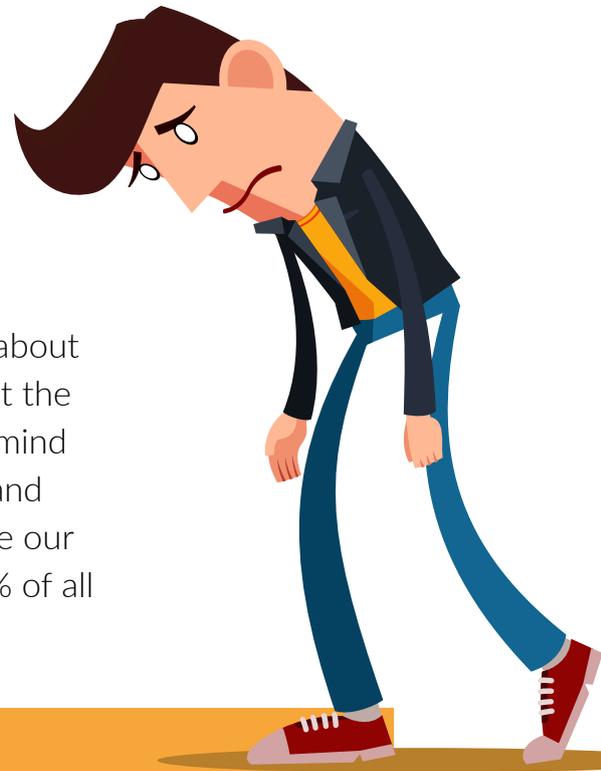
People worry the most about asking for the gift but the hardest part is just getting the visit. The good news? If you can get a visit with a donor you've got an 85% chance they'll make the gift. Here's 10 tips to get your foot in the door.

- Precall letter/LinkedIn message
("I'm going to call you next week to set up a visit...")
- Email
- Phone
- Video email
- Meet donor at event
- Board member introduces you
- Another donor introduces you
- Call to say thanks
- Call to invite them to event
- Call to ask their advice



IRRESISTIBLE OPENERS TO GET YOUR DONORS TO AGREE TO MEET WITH YOU

One of the most common mistakes I hear fundraisers make is asking for a visit by saying “I have some exciting updates for you.” Really? Because let’s face it, “exciting updates” sounds about as enticing as watching paint dry. This isn’t about you. It’s not even about the organization. It’s about the donor. To quote my friend and fundraising mastermind Tom Ahern, “I pay attention to what interests me and what interests me most is me. Ask anyone.” We are our favorite topic of conversation. Humans spend 60% of all conversations talking about themselves.



ADVICE VISITS

- “I want your input on a project we’re planning”
- “We want to get your take on something”
- “We are trying to figure out a way to do xxx. I’d love your input!”
- “What advice do you have for our students (graduating class, incoming class, etc)?”
- “I have sneak peek and want you to be the first to see it so I can get your input”

THANK YOU OR GET TO KNOW YOU VISIT

- “Every donor has a story to tell about their connection to _____ (name the organization, institution, or mission). I want to hear yours.”
- “I want to personally thank you and share your impact.”
- “I’m new here and my job is to get to know our loyal friends (patrons, members, alumni etc) so you can see the impact you’re making.”
- “I’m in your neighborhood (right by your office, home etc) and want to get better acquainted.”
- “I want to show you how your gift is making a difference.”



5 TIPS WHEN CALLING TO GET VISITS:

1. Smile the whole time, even if you get their voice mail.
2. Leave a message if you get voicemail.
3. Have a where, when and a plan B.
4. Call from different phones.
5. Commit to a call routine. Dedicate a 30 minute or one hour window of your day when you are at your most energetic.

TIPS FOR BOARD MEMBER CALLS TO DONORS:

1. Be warm, conversational and smile the whole time.
2. Immediately identify yourself as a board member.
3. Secondly, thank them for their support.
4. State why you are calling (to invite them, meet them, ask them etc).
5. If they don't answer leave a message with your call back number.

BONUS SAMPLE SCRIPTS TO NAIL THE ASK

The phone is one of the least expensive and powerful tools you have to get a visit with your donors, ask for a gift or upgrade their giving. Here's a variety of scripts for board and staff to use when calling donors to invite them to an event, for a face to face visit or to solicit a gift on the phone.

I WANT TO INVITE YOU TO COME SEE XXXXXX SO YOU CAN EXPERIENCE YOUR GIFT AT WORK. I WANT TO GIVE YOU EVERY OPPORTUNITY TO LEARN HOW YOUR GIFTS IMPACT THE LIVES OF XXXXXX.



“Hi, Martha. I’m Becky Jones and I’m a board member of Anytown Pets. We’re calling our most loyal donors to invite you to our wine and whiskers donor appreciation event. It’s a behind the scenes opportunity to learn how your gifts are impacting lives. Will I get to see you there?”

ASKING FOR A FACE TO FACE VISIT:

I WANT TO SIT DOWN WITH YOU TO GET YOUR FEEDBACK AND LEARN ABOUT YOUR INTERESTS. I CAN COME TO YOUR OFFICE OR YOUR HOME TO MAKE IT CONVENIENT FOR YOU. WOULD YOUR SCHEDULE ALLOW US TO MEET WEDNESDAY THE 7TH OR FRIDAY THE 11TH?



“Hi, Martha. I’m Becky Jones and I’m a board member of Anytown Pets. I’m calling to say thanks. Your generosity saves lives and we wouldn’t be a no-kill city without you. Do you have an animal, perhaps a dog or cat? Martha, I’d love to sit down with you to learn more about you and how helping our furry friends became a priority for you. Would your schedule allow us to meet Wednesday the 7th or Friday the 11th?”

PHONE SOLICITATION:

WHAT WE ARE DOING TODAY IS A PHONE CAMPAIGN SO WE CAN TACKLE THIS NEXT IMPORTANT PROJECT. WE ARE ASKING PEOPLE TO INCREASE THEIR GIFT BY XXX AMOUNT AND THEN THEY CAN HELP CREATE XXXXX IMPACT (OR REACH XXXXX PEOPLE, ETC).

MOST PEOPLE ARE GIVING IN THIS RANGE OF \$XXX TO \$XXXX. HOW MUCH WOULD YOU LIKE TO GIVE?



“Hi, Martha. I’m Becky Jones and I’m a board member of Anytown Pets. First off, I want to thank you. Your generous support has rescued pets from euthanasia and placed them with loving fosters and forever families. It’s because of you that these animals get a second chance and are adopted into loving homes. We’re so grateful to you. Do you have an animal, perhaps a dog or cat? Martha, the reason I’m calling today is because kitten season is around the corner. We’ve set a goal of spaying 1,000 cats to prevent the births of thousands of unwanted kittens this spring. Did you know in our busiest weeks we spay or neuter as many as 165 pets? Many of our friends are helping us out today with a monthly contribution of \$150 to pay for these surgeries. Can we count on you to help with a \$150 monthly gift?”

Always have a next step!

Not all of the gifts you receive will be earned on the spot. Most will result from follow-up efforts. Be prepared with your next step, whether it’s a face to face visit, an invitation to an event, a follow up report or proposal submission, a meeting with leadership, a testimonial from a client you’ve helped, a personal tour, or a site or program visit.



ABOUT RACHEL MUIR, CFRE

Rachel has worked every side of the Rubik's cube that is the nonprofit sector. When she was 26 Rachel Muir launched Girlstart, a non-profit empowering girls in math, science, engineering and technology in the living room of her apartment with \$500 and a credit card. Several years later she had raised over 10 million and was featured on Oprah, CNN, and the Today show. Today Rachel delivers keynotes, custom trainings and board retreats that transform people into confident, successful fundraisers. Learn more about Rachel at www.rachelmuir.com



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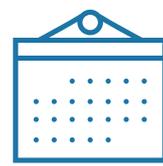
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