

5 Ideas for Getting the Appointment with Your Major Gift Prospect



Ok, you're about to pick up the phone to try to schedule a meeting with a donor prospect. Making that phone call can be the moment of truth! It can be scary. It's also a moment when fundraisers and volunteers chicken out.

Here are 5 ideas to help you make that phone call and get that appointment.

But first, remember why you are phoning for a visit:

- To determine IF the donor HAS interest in your organisation.
- To determine IF the donor even has CAPACITY to make a significant gift.
- To find out exactly WHAT the donor is interested in and WHY the donor is interested in your cause.

We call all this stuff "reconnaissance".

It's market research. It's scouting out ahead. It's gathering KEY DATA that can lead to a major gift. So, if you remember that this visit is purely "recon" and not a presentation, you can EXHALE! Right?

Here are my favourite ways to get in the door:

1. Thank you visit

This is by far the easiest call to make. And how wonderful for the donor – they know that you are not going to be asking for money.

The stakes are low. And the potential for each party to enjoy themselves is high.

Here's what you say over the phone:

"I'm calling to say thank you and to let you know how much we appreciate your gift, and I'd love to hear about your experience and why you gave."

What donor would not be happy to have that visit?

2. Advice visit

If you want money, ask for advice. If you want advice, ask for money!

Advice visits are my absolute favorite kind of visit. They are low pressure, very enjoyable, and usually yield TONS of info.

I've raised LOTS OF MONEY in my day by asking for advice.

Here's what you say when you pick up the phone:

"We are about to embark on a new, exciting project. I'd love to see what you think of it and get your input."

or

"We are thinking of xxxx new project. I'd love to get your impressions of this plan."

You have to remember that big donors are willing to see you **IF they know they get to do the talking**. Then they know it will not be a boring visit!

The great thing about advice visits is that CEO's and Board members love them and will often help you get the appointment.

3. "Get to know you" visit.

This is for a cool, or even cold call.

This is a "tell me about your personal experience" visit.

Here's what you say,

"I understand you recently (attended a performance, visited our hospital, participated in a walk, helped in a project, were served by the organisation – whatever fits here). . . . I'd love to hear about your personal experience."

Just introduce yourself. Be warm and conversational. Smile into the phone and it shows in your voice!

See if you can develop a conversation and then use the conversation to determine the level of the prospect's interest. IF they show some interest, ask if you can visit personally.

But don't let the prospect think you are scheduling a visit to their city just to see them!

Say, ***"I'm planning to be in Sydney next month, and I'd love to quickly drop by and say hello."***

Don't say, "You are such a huge prospect that I am flying across the country just to come see you!"

4. "Would you be interested in learning more?"

This, too, is for a cool call, with someone you don't know well. You may know that they are wealthy and generous, but you don't know how interested they are.

You are calling someone who has recently visited or participated in your organization's work.

Use this along with the "Get to Know You" visit idea.

This question is nice because it's all about the donor, and the donor's wishes.

5. "I have an idea I'd like to run by you."

Use this when you already have a relationship with the prospect, but they are hard to reach. Key prospects who are world travelers, big business people, and very difficult to get in front of.

Be "charming and vague" on the phone.

Say, "I have an idea I want to run by you."

This sounds intriguing. It feels interesting. And it seems important.

Probably the most important thing is to be charming. You want the prospect to feel like visiting with you is enjoyable. That way they will make the time!

Good Luck, Brian