

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

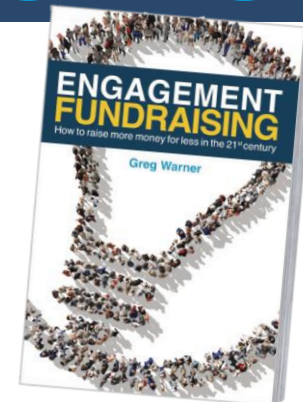


CEO & Founder

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Author of
Engagement
Fundraising

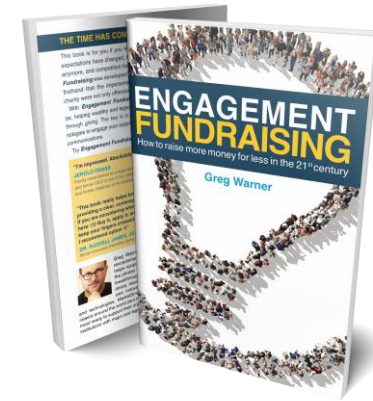


Who is this guy?



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

30,000



Who is this guy?



Major & legacy gift FUNDRAISING CHALLENGES

EMPATHY

Getting an appointment is not easy!

“

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

POLL #1

How strongly do you **agree or disagree** with this statement?:
“It’s harder to land an appointment than to close a major gift”

- Strongly agree
- Somewhat agree
- Neither agree nor disagree
- Somewhat disagree
- Strongly disagree



Major & legacy gift FUNDRAISING CHALLENGES

POLL #2

How strongly do you **agree or disagree** with this statement?:
**“Landing appointments with highly passionate,
wealthy supporters is getting harder.”**

- Strongly agree
- Somewhat agree
- Neither agree nor disagree
- Somewhat disagree
- Strongly disagree



**Major &
legacy gift**
FUNDRAISING
CHALLENGES

POLL #3

What is your biggest challenge related to outreach?

Supporters **don't respond**

Supporters say: **"I'll give, don't need a visit"**

Supporters **keep delaying the visit**

I'm not sure **what to say when I reach out**



Major & legacy gift FUNDRAISING CHALLENGES

What is your biggest challenge related to outreach?

Supporters **don't respond**

Supporters say: **"I'll give, don't need a visit"**

Supporters **keep delaying the visit**

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



TACTICS

10 TIPS

TACTICS

1

ADJUST YOUR MINDSET

- YOU ARE NOT:**
- ✓ A BEGGAR
 - ✓ A MANIPULATOR
 - ✓ AN ARM TWISTER
 - ✓ EXTRACTOR

TACTICS

1

ADJUST YOUR MINDSET

INSTEAD, YOU ARE A:

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

A VALUE

PROVIDER:

**PROFESSIONAL
FACILITATOR,
VIP RESOURCE,
COUNSELOR
& GUIDE**



TACTICS

1

ADJUST YOUR MINDSET

- ✓ TRUSTWORTHY
 - ✓ VALUE PROVIDER
 - ✓ INTERESTED IN THEM
 - ✓ DEEPEN A RELATIONSHIP
- =
- LAND MORE
APPOINTMENTS
& CLOSE MORE GIFTS

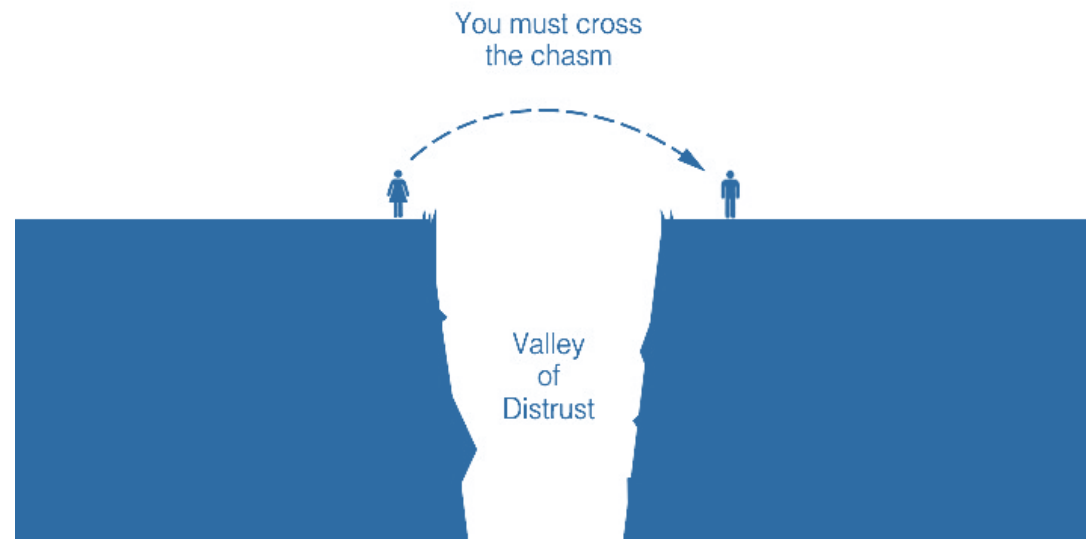
**A VALUE
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TACTICS

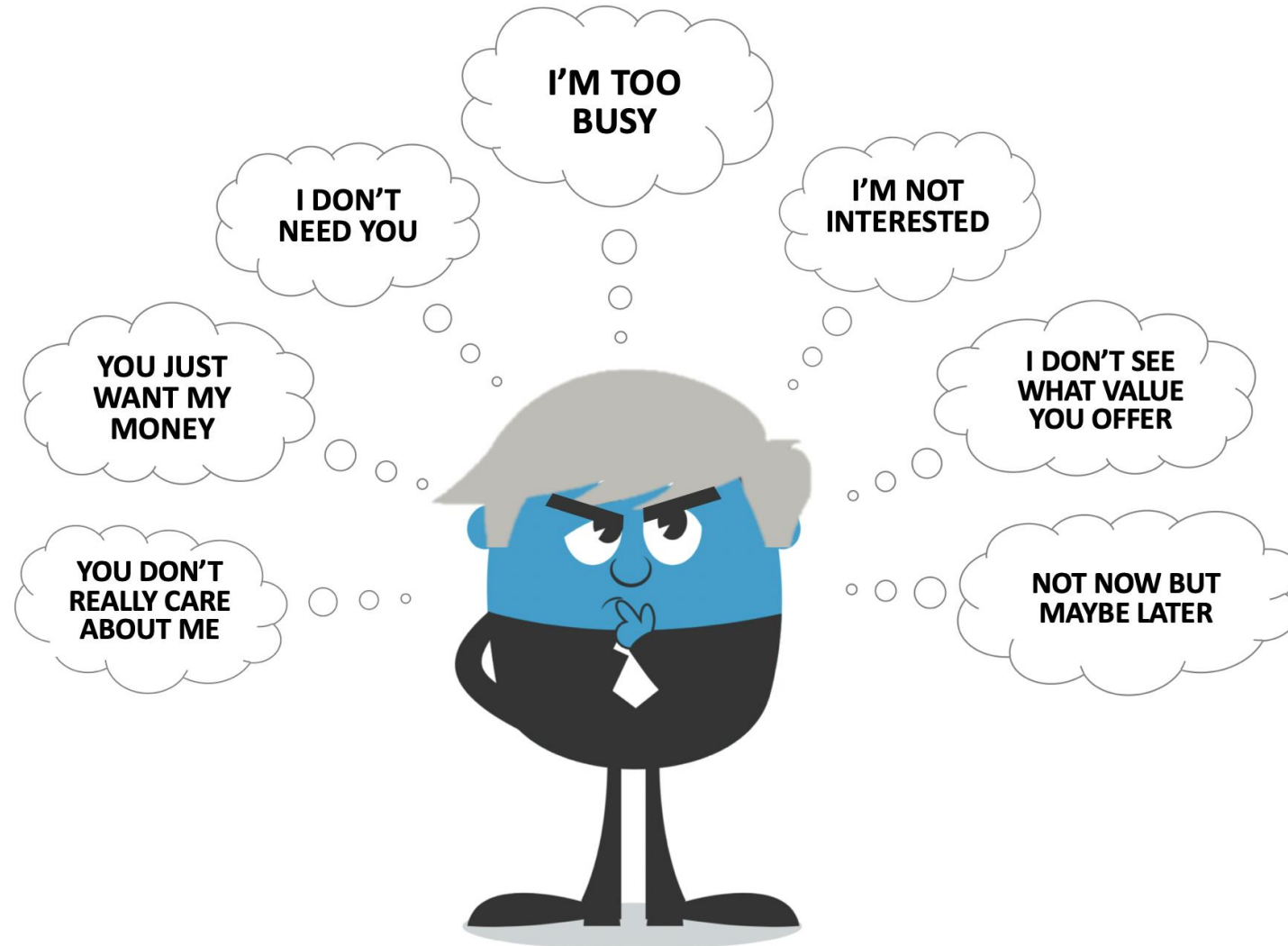
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RECOGNIZE THE EXISTENCE OF THE VALLEY OF DISTRUST



TACTICS

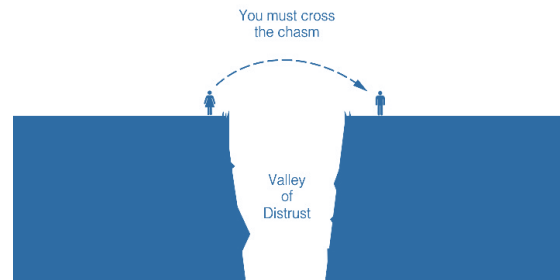
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TACTICS

3

BUY INTO AN ENGAGEMENT CALLING PROCESS



UNLESS THE DONOR SIGNALS READINESS

- ✓ 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

- ✓ CONDUCT RESEARCH
~~IDENTIFICATION~~ QUALIFICATION
RESEARCH
- ✓ GAIN EMPATHY
- ✓ THINK / ALIGN



IDENTIFICATION



QUALIFICATION

- ✓ Why do they care?
- ✓ Who inspired them?
- ✓ Level of passion?
- ✓ Rank?
- ✓ Aspects of your work that interest them?
- ✓ Interest in giving assets?
- ✓ Timing for giving assets?
- ✓ Interest in meeting with you?



TACTICS

3

HOW TO PROVIDE VALUE

**LISTEN TO WHAT
THEY SAY**

“VERBATIMS”

**MONITOR WHAT
THEY DO**

“DIGITAL BODY LANGUAGE”



IDENTIFICATION



QUALIFICATION



REGENCY IS THE KEY TO SUCCESS

+700%



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



IDENTIFICATION



QUALIFICATION

TACTICS

3

HOW TO PROVIDE VALUE

THINK!

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



IDENTIFICATION



QUALIFICATION



TACTICS

35 AMAZING WAYS TO ENGAGE AND INVOLVE YOUR DONORS AND SUPPORTERS

- 1 Surveys
- 2 Quizzes
- 3 Invitations to join a board or committee
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TACTICS



"This stuff really works!"

Is Your Engagement Offer Worthwhile?

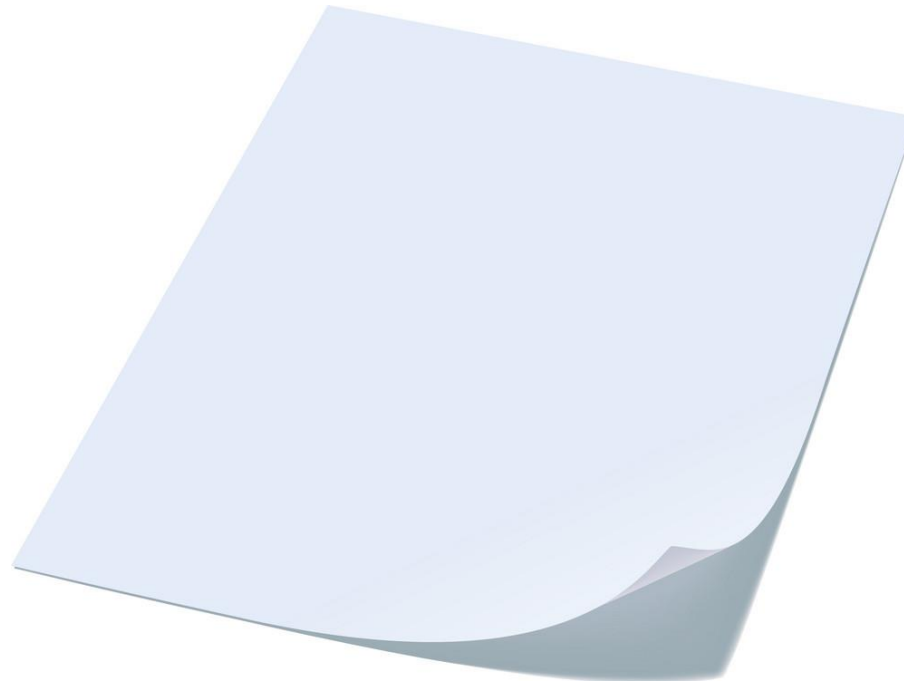
DONOR OFFER **VALUE CHECKLIST**

- Is it fun?
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- Does it help them feel like they are the hero in their own life story (provide feelings of autobiographical heroism)?
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- 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

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:

Show 'em that you know 'em

Be relevant

Be emotional/enthusiastic



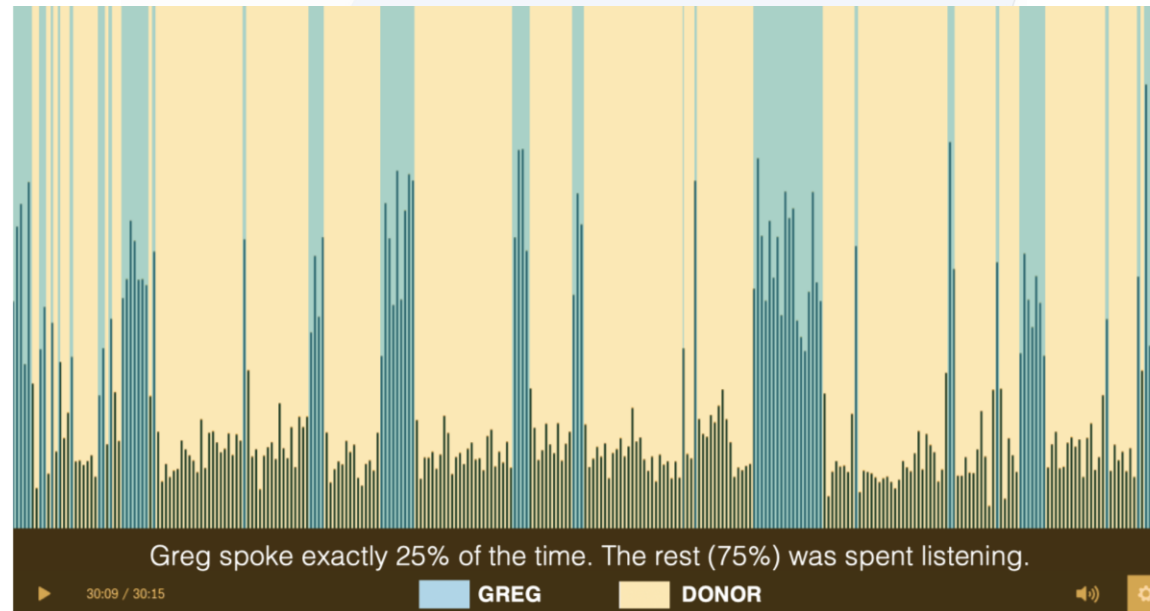
TACTICS

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**



BE CURIOUS

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

TACTICS

6

**BE CLEAR, THEN
SHUT UP!**



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!

“[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!

“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!

“[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!

“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!

“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!

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
 - ✓ Show gratitude for their past support
 - ✓ Be relevant
 - ✓ Be emotional
 - ✓ Be enthusiastic



TACTICS

8

CONSIDER LINKEDIN & TEXTING

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

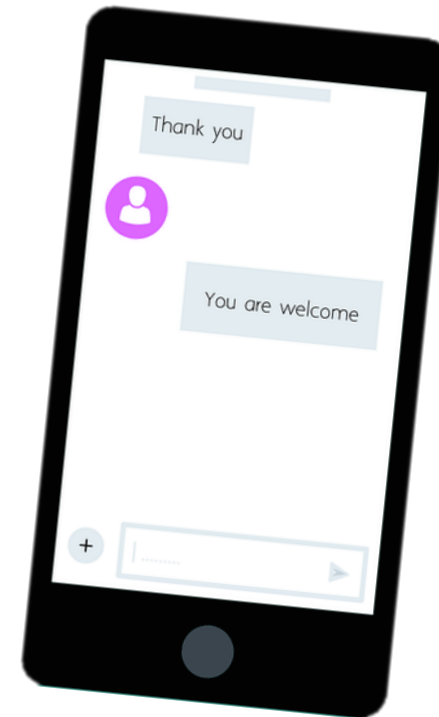
- ✓ **Take a peek** at a prospect's profile (certain percentage will, in turn, take a look at your profile)
- ✓ Then **send your first InMail**

This works because now the prospect is receiving your InMail after already determining that you have a shared interest— your mission!



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TACTICS

9

COUNT YOUR FAILURES AS SUCCESSSES



DISQUALIFY

NO = NOT NOW

TACTICS

10

LEVERAGE REFERRALS



Who do you know
who knows them?

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 & texting
Count failures
Leverage referrals

**QUALIFIED APPOINTMENTS
WILL ALMOST SET
THEMSELVES**



THANK YOU



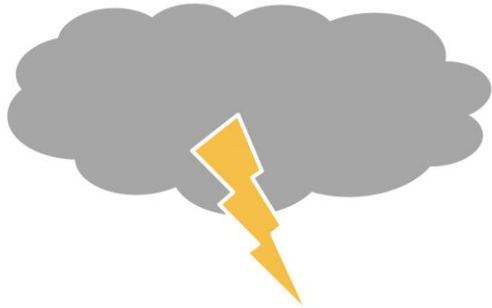
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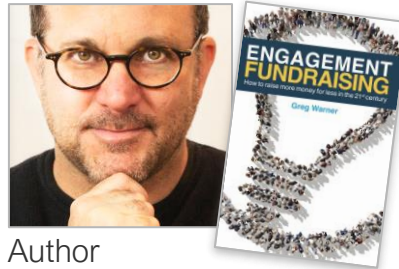
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QUESTIONS?



Webinar presentation
FEEDBACK / SURVEY



Author
Engagement Fundraising

Greg Warner
CEO & Founder

Buy it here:

www.engagementfundraisingbook.com

Or order a free copy by emailing:

info@imarketsmart.com



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www.linkedin.com/in/gregmarketsmart/

Inventor
**FUNDRAISING
REPORT CARD** 

www.fundraisingreportcard.com

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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.

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EXTRAS

35 AMAZING WAYS TO ENGAGE AND INVOLVE YOUR DONORS AND SUPPORTERS

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- 2 Quizzes
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EXTRAS



"This stuff really works!"

Is Your Engagement Offer Worthwhile?

DONOR OFFER **VALUE CHECKLIST**

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- Will it educate or inform them?
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- 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!



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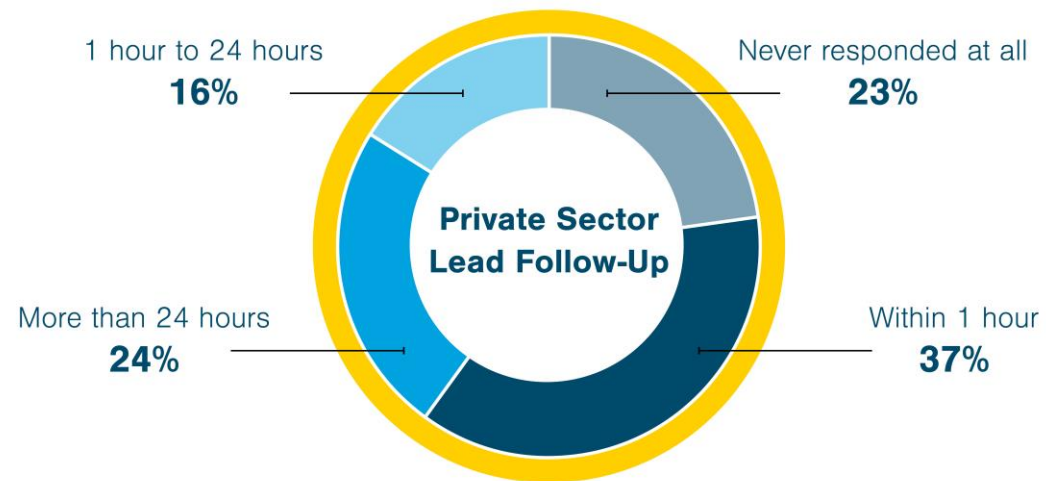
EXTRAS

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

YOUR JOB IS NOT TO MAKE CALLS TO DONORS IT'S TO MAKE CALLS THAT GET RETURNED

1. Prove value
Give them a good
reason to call you
back.

2. Build trust
Assume they've
been burned
before.

3. Make an offer
Make sure it's one
they can't resist.



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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

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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

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EXTRAS

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ABOUT
YOU

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