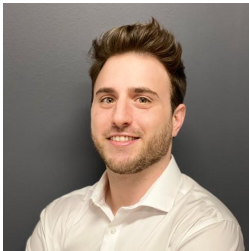


# How To Land Appointments

with more

## Major Gift & Legacy Gift Donor Prospects

who are ready for your outreach



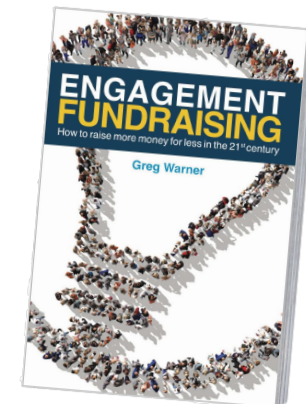
JEFF GIANNOTTO

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[jgiannotto@imarketsmart.com](mailto:jgiannotto@imarketsmart.com)



[imarketsmart.com](http://imarketsmart.com)



# AGENDA

- 1. Adjust your mindset**
2. Valley of distrust
- 3. Engagement calling**
4. Provide value
- 5. Practice dialogue**
6. Give them power
- 7. Be clear & shut up**
8. Leave voicemails
- 9. Linkedin & texting**
10. Count failures

**QUALIFIED APPOINTMENTS WILL  
ALMOST SET THEMSELVES**



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# Major & legacy gift FUNDRAISING CHALLENGES

## 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.”



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## Major & legacy gift FUNDRAISING CHALLENGES

# POLL #1

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



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## Major & legacy gift FUNDRAISING CHALLENGES

# POLL #2

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**



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# 10 TIPS

# TACTICS

1

## ADJUST YOUR MINDSET

**YOU ARE NOT:**

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



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# TACTICS

1

## ADJUST YOUR MINDSET

INSTEAD, YOU ARE:

- ✓ TRUSTWORTHY
- ✓ VALUE PROVIDER
- ✓ INTERESTED IN THEM
- ✓ DEEPEN A RELATIONSHIP

=

LAND MORE  
APPOINTMENTS  
& CLOSE MORE GIFTS

A VALUE  
PROVIDER:  
PROFESSIONAL  
FACILITATOR,  
VIP RESOURCE,  
COUNSELOR  
& GUIDE



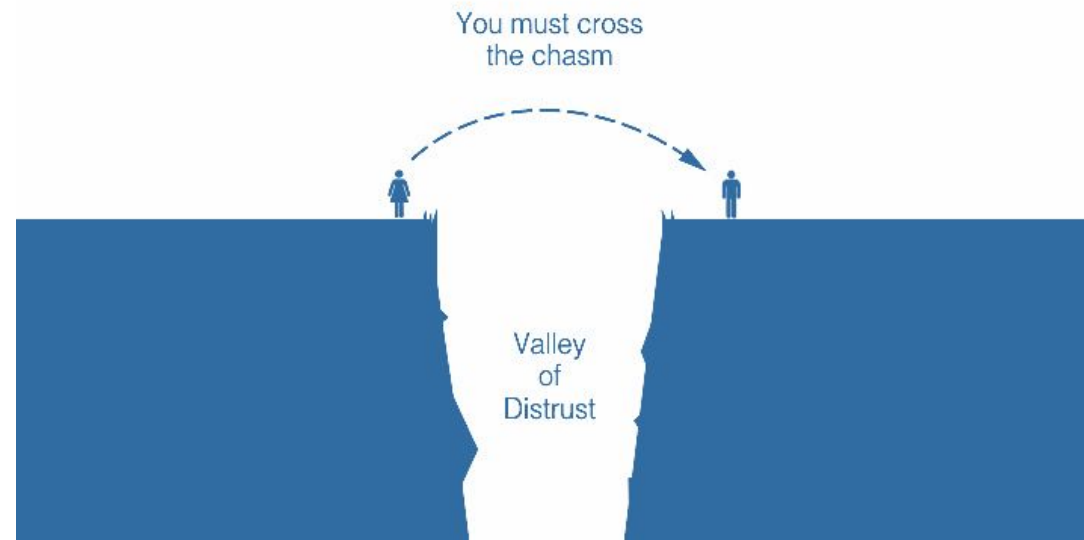
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# TACTICS

2

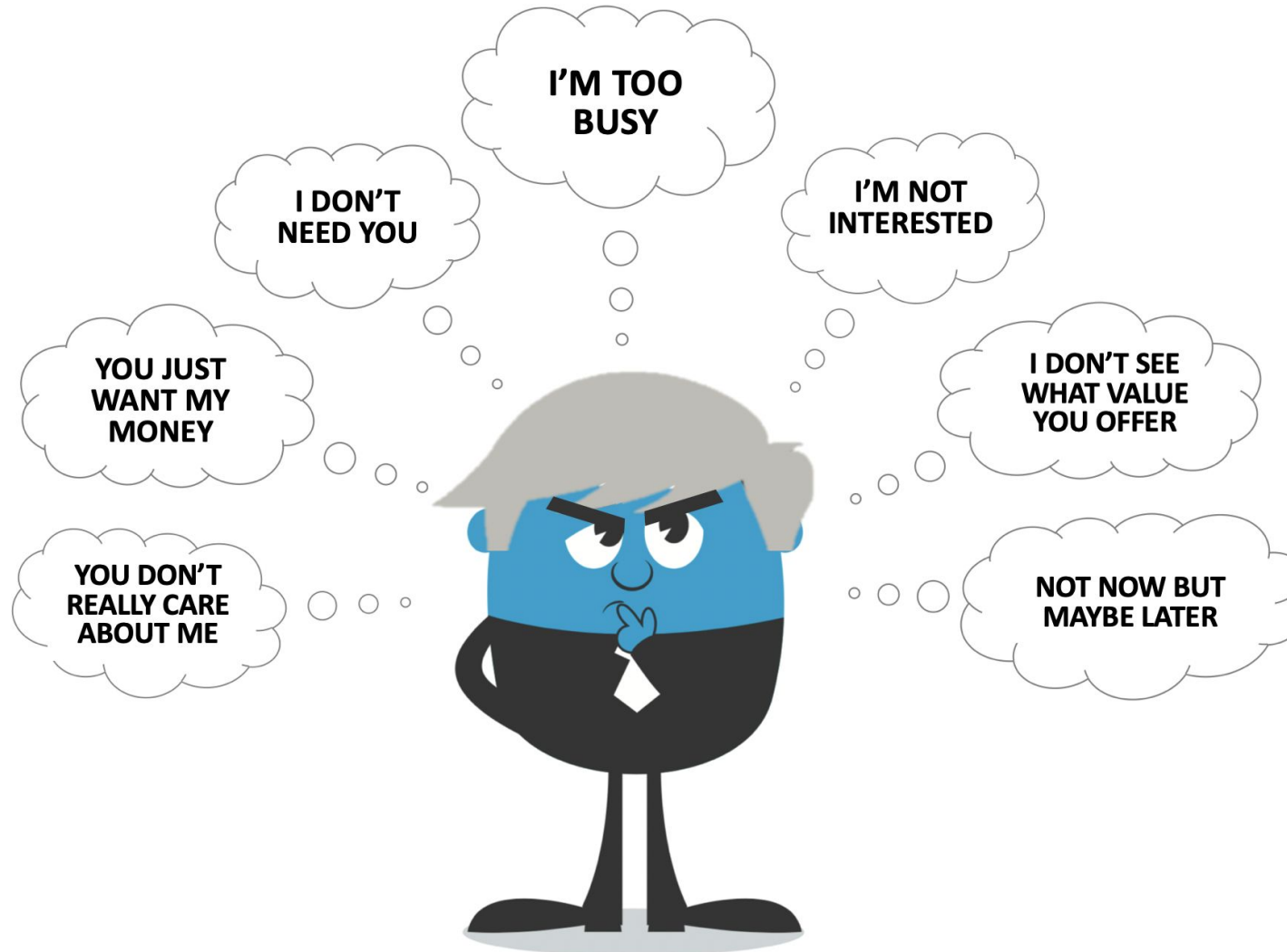
## RECOGNIZE THE EXISTENCE OF THE VALLEY OF DISTRUST



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# TACTICS

2

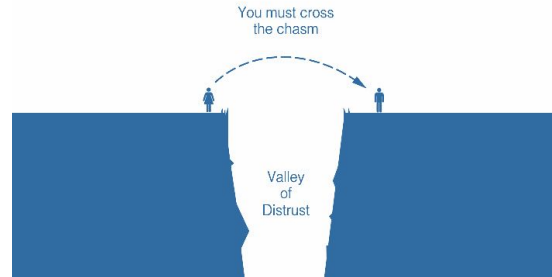


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# TACTICS

## 3

# BUY INTO ENGAGEMENT CALLING



**(UNLESS THE DONOR SIGNALS READINESS SOONER)**

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



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# TACTICS

## 4

# PROVIDE VALUE



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# TACTICS

4

## HOW TO PROVIDE VALUE

**THINK!**

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



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# TACTICS

4

## HOW TO PROVIDE VALUE

### LISTEN TO WHAT THEY SAY

“VERBATIMS”

### MONITOR WHAT THEY DO

“DIGITAL BODY LANGUAGE”

- ✓ Why do they care?
- ✓ Who inspired them?
- ✓ Level of passion?
- ✓ Where does your mission rank?
- ✓ What programs interest them?
- ✓ Interest in giving assets?
- ✓ Timing for giving assets?
- ✓ Interest in meeting with you?



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# 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



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# TACTICS

## 4

# HOW TO PROVIDE VALUE

RECENCY IS THE KEY TO SUCCESS!



**+700%**

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



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# TACTICS

5

## PRACTICE YOUR DIALOGUE

**Ask questions - Listen 75% of the time**

**Show 'em that you know 'em**

**Be relevant**

**Be emotional/enthusiastic**



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# TACTICS

## 6

# GIVE THEM POWER

“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”



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# TACTICS

6

**GIVE THEM  
POWER**

**BE CURIOUS**

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



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# TACTICS

7

**BE CLEAR, THEN  
SHUT UP!**



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# TACTICS

7

## 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



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# TACTICS

7

## BE CLEAR, THEN SHUT UP!

### DO NOT SAY:

*"I'd like to update you  
on what we're doing."*



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# TACTICS

7

## 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?”



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# TACTICS

7

## 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?”



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# TACTICS

7

## 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?”



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# TACTICS

## 8

# LEAVE VOICEMAILS



### Offer to provide value that is relevant to them

- ✓ Show 'em that you know 'em
- ✓ Show gratitude for their past support
- ✓ Be relevant
- ✓ Be emotional
- ✓ Be enthusiastic



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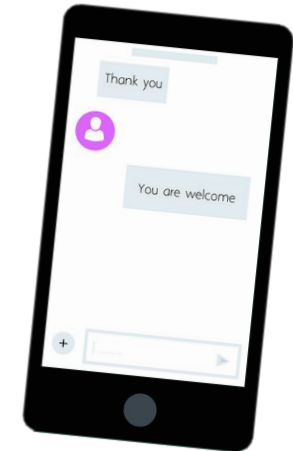
# TACTICS

## 9

# UTILIZE LINKEDIN & TEXTING



- ✓ Ask for permission to text.
- ✓ LinkedIn:
  - ✓ Connect with supporters before calling or visiting.
  - ✓ Like posts, comment, repost company marketing to your network.
  - ✓ Send value to supporters via LinkedIn messages.
  - ✓ Consider LinkedIn SalesNav.



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# TACTICS

10

## COUNT YOUR FAILURES AS SUCCESSSES



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# BONUS

## 11

# LEVERAGE REFERRALS



Who do you know  
who knows them?



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# REVIEW

1. Adjust your mindset
2. Valley of distrust
3. Engagement calling
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**QUALIFIED APPOINTMENTS WILL  
ALMOST SET THEMSELVES**



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**How MarketSmart's system  
helps you land  
more appointments**

How we help people like you:



**1. Pre-qualify supporters who** are  
ready for outreach now.



**2. Effortlessly cultivate prospects until**  
they are ready to take the next step.



**3. Make it easy for qualified supporters**  
to schedule meetings with you.



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# Donor-driven fundraising process

Prospect research  
Predictive analytics

Donor-driven engagement  
+ Automated cultivation



Powered by  market smart



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# Donor-driven fundraising process

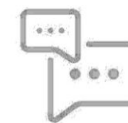
Prospect research  
Predictive analytics

Donor-driven engagement  
+ Automated cultivation

Discovery calls & visits  
(in-person or virtual)



ONE-TO-ONE  
CULTIVATION



SOLICITATION



NEGOTIATION



STEWARDSHIP

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# Donor-driven fundraising process

Prospect research  
Predictive analytics

Donor-driven engagement  
+ Automated cultivation

Discovery calls & visits  
(in-person or virtual)

Frontline fundraiser  
caseload management



Powered by  market smart



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# **Donor-driven** fundraising process

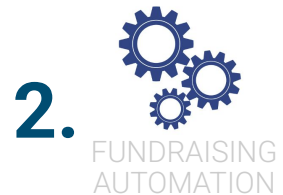
Donor prioritization  
Staff optimization



Powered by [market](#)  **smart**



- ✓ **Scale discovery** with unassigned supporters
- ✓ **Qualify readiness** for mid-level, major & planned gifts
- ✓ **Assign outreach-ready prospects** to fundraisers



- ✓ **Warm up leads** until ready for outreach



- ✓ **Schedule meetings** when the timing is right

# Engagement Fundraising System



**Smart Strategy**



**Smart Software**



**Smart Support**

**FREE**  
DO-IT-YOURSELF



Schedule a  
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# Engagement Fundraising System



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# Engagement Fundraising System



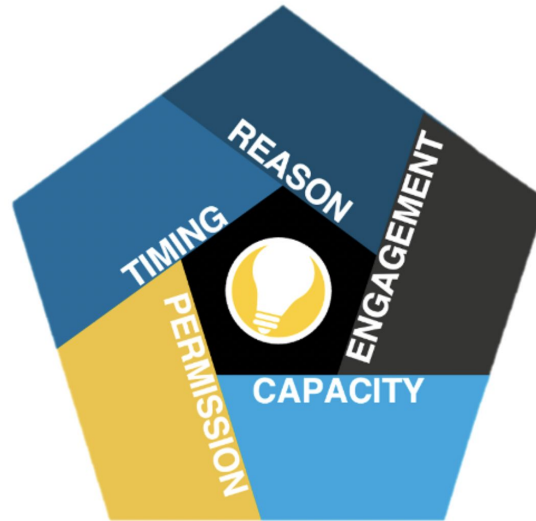
“““

With their Engagement Fundraising system, fewer staff can accomplish much more - with a better ROI.

JOSEPH LOVELL



Smart Software



Prioritization  
Pentagon



“““

People are reaching out to me, instead of the other way around! How refreshing is that?

CHERYL SMOOT





# Engagement Fundraising System



Smart Strategy



Smart Software



Smart Support

**“AI-Enhanced > Human-Focused”**



**Implementation**



**Training**



**Ongoing Support**

- Dedicated Customer Success Manager
- Online Chat (With a Real Human)

**Special Bonus**  
Online Training Course  
with Dr. Russell James



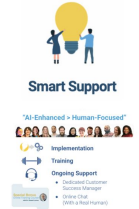
MarketSmart  
allows me to work  
with prospects  
who are willing  
and ready to talk.

ART TRACY  
SKIDMORE





# Return on investment (ROI)



Immediate ROI

10x

Long-term ROI goal

100x



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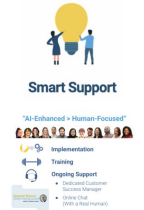
“

\$60 returned for every \$1 invested and we haven't even really scratched the surface yet.

JONELLE BECK  
UNIVERSITY OF THE  
PACIFIC



# Return on investment (ROI)



	Do-it-yourself	With market <span>smart</span>
Time to launch	6–12 months	10–12 weeks
Staff required	Multiple employees	Done-for-you
Learning curve for getting results	High — trial and error	Low — proven system
Lead prioritization time and effort	High — manual	Low — dashboard
Lead alerts and notifications	None	Automated
Return-on-investment guarantee	None	No risk! — 10-to-1 ROI guaranteed



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# Clients

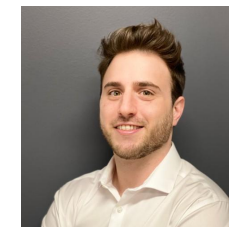


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# THANK YOU! QUESTIONS?



**SCAN FOR WEBINAR  
FEEDBACK SURVEY**



**JEFF GIANNOTTO**

Director of Sales

[jgiannotto@imarketsmart.com](mailto:jgiannotto@imarketsmart.com)



**SCAN TO SCHEDULE  
A FREE  
CONSULTATION**

- ✓ Discuss your mid-level, major, and planned giving goals.
- ✓ See if you qualify for our 10:1 ROI Guarantee.
- ✓ No sales pitch – just a clear overview of how MarketSmart can help.
- ✓ Walk away with practical ideas, even if we're not a fit.

imarketsmart.com

