



The Little Things

...and how they affect the BIG picture

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What is the Big Picture?

#1 Client Satisfaction

(or Director of Annual Giving, VP, Board of Trustees, etc)

- **How?**
 - **Total Pledges**
 - **Total Dollars**
 - **Fulfillment**

Pledges

- **Non-Donor Participation**
 - **Realize how important Nons are**
 - **Typically account for at least 20% of all pledges**
 - **Make sure the callers realize the importance**
 - **If you can call Nons, you can call anything**
 - **Can't call Nons = trouble**



Non-Donor Participation

- **Identify Non-Donor Problems**
- **Giving Up/Hang-ups?**
 - **Not the real problem**
 - **Giving up vs. Hang-ups**
 - **Callers give up when they don't know what to say, so giving up isn't the real problem, it's their training**
 - **Prepare them for the difficulties on Nons**



Non-Donor Participation

- **The Real Problems**
- **#1 Initial Objections**
 - “I’m calling for a couple different reasons”
 - Tip sheets
- **#2 Procrastination Objections**
 - Fence sitters
 - Can make or break non-donor participation
 - Post at station



Non-Donor Participation

- **#3 Comfort Level with Script**
 - **Begins in training, continues on phone**
 - **“outline” vs. “script”**
 - **Bullet points vs. paragraph form**
 - **Each caller is different, identify their problem sooner rather than later (ie. First night calling)**



Non-Donor Participation

- **Address all 3 of these problems on their first night of calling**
- **Don't abandon them after 1st night**
 - **Ongoing training is just as important as initial training**



Lybunt Participation

- **These are our most important records**
 - **Don't make it sound too easy!**
- **Donor Training 10-20 minutes w/ tip sheet**
 - **Don't *just* train on upgrades**
 - **Adjusting speed of call**
 - **Avoiding quick renewals**
 - **Being prepared for procrastination objections**



Lybunt Participation

- **1st Time Lybunts**
 - Segmented out for a reason, train appropriately
 - Were all Non-donors last year
 - Emphasize the “Thank You”
 - Remind of last gift throughout the call
- **\$1-49 Lybunts**
 - Train in much the same way
 - Under \$1,000 fact



Parent Calling

- **10-20 minute Parent training**
- **Tip sheets**
 - **It's all in the rapport**
 - **Tip sheets by class year**
 - **Potential Objections**
 - **Paying tuition**
 - **Give after graduation**
 - **Give directly to child**

Dollars

▪ Upgrades

- **Get creative! Try new things!**
- **Quantitative Asks**
 - **\$10 minimum upgrade x 7,000 donor pledges**
 - **“We have a goal to raise an additional \$70,000 and we’ve figured out that if everyone increases their gift by just \$___, it adds up that much!”**
 - **Wording**
- **Smaller scale, still significant to 1 student**
- **Beginning of close vs. end of close**

Fulfillment

- **The Close**
 - **Make it simple**
 - **Commitment \$_____**
 - **CC x2**
 - **Commitment \$_____**
 - **MG**
 - **Email**
 - **Commitment \$_____**
- **Post at stations**
- **Training**
 - **Make everyone say it from memory during 1st training**
- **Emails**
 - **Work into nightly games/competitions**



Fulfillment

- **Credit Cards**
 - **Assumptive 1st Ask**
 - **Persuasive 2nd Ask**

- **It's all in the wording**
 - **How you say it is more important than what you say**

Credit Cards

- **1st Ask**
 - *“We’d prefer you make your gift by credit or debit card. Which will you be using tonight?”*
 - **“Prefer” in the 1st ask makes it non-assumptive**
 - *“Which credit or debit card will that be on?”*

Credit Cards

- **2nd Ask**
 - *“...By using your (credit card/debit card) tonight you will help us save \$4 in postage and processing costs...”*
 - not persuasive enough
- **Quantitative Ask**
 - \$4 per pledge x 9,000+ pledges = \$36,000+
 - *“We prefer that you put your gift on credit or debit card because if everyone were to do this, we would save over \$36,000 in postage and processing costs.”*



Beyond Calling...

- **Retention**
 - **Affects the bottom line**
 - **More turnover = more training pay**
 - **As well as weaker callers!**
 - **Adjust training to avoid initial turnover**
- **Motivation**
 - **More than just nightly games**
 - **Themed days, Phonic Awards, Birthdays**
 - **Get creative!**



The Little Things

- **Moral of the Story:**
 - You only get 1 chance to say things, so you want to say them right
 - Ongoing training is just as important as initial training
 - Never let yourself run on “autopilot”