Approaching the Prospective Donor: *Step 3 of the Cause Selling Cycle*

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fundraise

YOU’VE GOT A CAUSE
LEARN HOW TO FUND IT.

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TODAY’S PRESENTER:

Tony Beall

Director, Sanford Institute of Philanthropy
The Cause Selling Cycle

THE EIGHT-STEP CAUSE SELLING CYCLE represents the steps good fundraisers take to become great fundraisers!
Discover ways to capture the **interest** of prospects.

Understand how to make a **positive first impression**.

Find out how to **leave the right first impression at your next event**.
APPROACH
OBJECTIVES

To make a **favorable** or **positive** impression

To gain the prospect’s **undivided attention**

To develop **positive interest** in your cause

To lead smoothly into the **discovery phase** of the interview
What is considered the average amount of time a prospect takes to decide whether or not to give?

- Immediately
- 2 Minutes
- 4 Minutes
- 30 Minutes
- One Hour
Scheduling a Meeting & Delivering Your Message
Scheduling a Meeting

Gatekeepers

• Be **respectful** of their important role
• Be **honest** about your intentions
• Use and **remember** their name
• Establish **rapport**
• Be **thoughtful**
Scheduling a Meeting

• When is the **best time** for the prospect?
• What’s the best **location**?

For YOU → the prospect’s home or office

*you can gather clues regarding their passions*

• Recognize the **first appointment** often requires prior calls, emails, or letters.
Delivering the Message

• Your message is a blend of symbols to influence the prospect’s attitude or behavior.
• It involves both verbal and nonverbal elements.
• If verbal and nonverbal messages are in conflict, the listener generally relies on the nonverbal message.
First Impressions

You might only get one chance, so make it count!
Nonverbal Communication

- Body language transmits feelings and emotions
  - Facial expressions
  - Stance and posture
  - Grooming
  - Clothing & accessories

Look the part!
Nonverbal Language

Representing your cause:

- Get the prospect to take you **seriously**
- A **respectful appearance** is an added compliment

_No matter your message, it’s your visual appearance that speaks first!_
Voice

5 things to watch out for:

1. Strive for **clarity and articulation**
2. Watch your **volume**
3. **Modulation** for emphasis
4. **Rhythm**
5. **Rate** of Speech
Thank the prospect for the meeting
Avoid trite or cliché greetings

Plan your greeting in advance
Keep it simple, respectful, and confident

Failure to prepare in advance can lead to stammering or faltering speech
The Handshake

- Maintain **eye contact**
- Apply firm, **consistent pressure**
- Hands should meet at an **equal distance** between you and the prospect vertically

Other tips:
- A woman should **initiate** the handshake with a man
- If your palm tends to be moist, carry a **small handkerchief**
Proxemics

the physical distance individuals prefer to maintain between themselves and others

- Carefully test for a prospect’s comfort zone
- Comfort zones tend to change with gender, status, or age
- Four to twelve feet could be a good distance in which to begin with a new potential donor
- The intimate zone should be entered only by invitation or during a handshake
Communication Barriers

- Jargon
- Distractions
- Insufficient time
- Interruptions
- Odors & lighting
- Poor listening
Build a **Foundation of Trust**

- Prospects **don’t want fact-sheet style** knowledge
- They want to know they can **trust you**
- Build trust through a consistent display of **INTEGRITY**
Integrity is *not* a short-term gimmick.

It's a *long-term commitment* that builds donor loyalty and your authority over the long haul.
Meeting Tips

Introduce a solution
- Don’t tell them what the cause “needs”
- Share the solutions your cause provides

Visual Appeal
- Use impactful photos, drawings, or other visuals
- PowerPoint deck (brief)
Types of Approaches
1. **Relevant Benefit Approach**

Useful when you **already know** the issues and areas that are of the **most interest** to the prospect.
2. Impact Approach

Useful when you already know the prospect’s dominant gifting motive
Types of Approaches

3. Curiosity Approach

You should know something about the prospect and even one of their **hot button issues**
4. Compliment Approach

Signals your honest interest in the prospect

Make it sincere, specific, and of genuine interest
5. Referral Approach

Helps you establish leverage by borrowing the influence of another donor or someone the prospect trusts and respects.
6. Educational Approach

Show your knowledge and expertise in your cause.

Would work well in a virtual meeting.
Types of Approaches

7. Hands-On Approach

Provides a **visible image** of what your cause represents

- Stirs **interest**
- Creates a feeling of **commitment**
- Makes a **multiple-sense** appeal
Events
Before the Event

- Know your audience
- Set a single goal
- Choose the right type of event
- Think creatively
- Budget realness
- Create a compelling invitation
- Ensure a dynamic experience
During the Event

- Check-In/Customer Service
- Circulate Staff/Board Members
- Connect
- Keep It Moving
After the Event

Thank you

Thank attendees & supporters

Pursue EVERY potential relationship

Examine & critique
Don’t forget to download the summary!
Questions?

Please send them in the chat!
CONTACT TONY!

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Winter is Coming! Now’s the Time to Plan Your End-of-Year Campaign!

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Thank you

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