Setting Up Your Approach with a Digital Twist
March 18, 2020
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fund·raise

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

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TODAY’S PRESENTER:

Francisco Martinez

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Trainer
Sanford Institute of Philanthropy
The Cause Selling Cycle

Phase One
Phase Two
Phase Three

THE EIGHT-STEP CAUSE SELLING CYCLE
represents the steps good fundraisers take to become great fundraisers.
Learn the objectives of the pre-approach and the best sources for finding the information you need.

How to use social media platforms to reach like-minded prospects.

How to stay true to each platform’s mission statement - figure out what to post and where.
Do you utilize social media to conduct pre-approach research?

Yes, I use Facebook
Yes, I use LinkedIn
Yes, I use Twitter
Yes, I use a different platform (tell us in the Chat!)
No, I do not use social media
The Cause Selling Cycle

The Pre-approach
• Follows Prospecting and precedes the Approach

The Key
• To meet face-to-face with only qualified prospects who have the means and ability to give, coupled with a genuine passion for your cause
Leads can be qualified at any point in the cycle.

- **Prospecting**
- **Pre-Approach**
- **Approach**
- **Need Discovery**

Qualified Prospects
Who is a **Qualified Prospect?**

- Strong **possibility** of becoming donors
  - Possess the necessary **characteristics** that make them logical contributors to your organization

They have the **means** to give, the ability to make the giving **decision, interest** in your organization’s mission, and *(ideally)* an **existing relationship** with your organization’s staff or volunteer leadership that provides access to make a request for **support**
Utilize Social Media During Pre-Approach

Disclaimer: Increasing your social media presence by no means guarantees more donations

• BUT you can maximize the reach and effectiveness of social media to boost your pre-approach efforts

• You can also perform a quick search of prospects via Google & Social media to begin qualifying them
The M.A.D.D.E.N. Test

- Money
- Approachable
- Desire
- Decision-Making Ability
- Emotion

- Need you can satisfy - (passion for your cause)
M.A.D.D.E.N. Activity

Prospect Qualification Worksheet

Download the handout from your GoToWebinar panel!
We will also send you a copy in the follow-up email.
Leverage LinkedIn

• The Power of LinkedIn Search
• What other Nonprofits has my prospected engaged with?

Leverage LinkedIn
Leverage LinkedIn

• What can we uncover from Articles and Activities?

Articles & activity
2,260 followers

Ethics In Fundraising: Your Thoughts?
Tony Beall
Published on LinkedIn

Hi! Happy Monday! I have the unique and humble honor to produce an 800-1,000 word article for a global publication on the topic of Ethics in Fundraising, Sanford Institute of Philanthropy. ...see more

15 Likes • 2 Comments
Like Comment Share

See all activity

See all articles
Leverage LinkedIn

- What can we uncover from the **Groups** your prospect is a part of?
96% of nonprofits agree that Facebook is the most important social networking tool for their organization.

- HOWEVER, fewer than 1/3 of nonprofits spend more than 6-10 hours per week in social media.
Get Tactical on Facebook

- Throughout the year video **document** your impact
- At the end of the year compile an **impact video** and place it on social
Get Tactical on Facebook

• When people click on it, have it lead potential prospects to your homepage, where they can learn more about you, making your approach that much easier.
Utilizing Social Media: A Practical Approach

- Research on LinkedIn
- Get to the Point on Twitter
- Inspire Through Your Facebook Page
Research on LinkedIn

- LinkedIn = the largest professional network in the world. Greater benefits for organizations that use it correctly.
  - The people in your network actually matter as opposed to people who like your organization on Facebook.

- Great resource for prospect research – giant prospect qualification database

- Spheres of Influence
Research on LinkedIn

• Research donor and prospect profiles to learn:
  • Spheres of influence – who do they know? Can someone make a connection for you?
  • Valuable clues on how to best appeal to them

• Write recommendations for others, including your board members and major donors

Note: when making connections with donors and prospects, do so with your organization’s LinkedIn page – NOT your personal.
Get to the Point on Twitter

Micro-blog ➔ Keep in touch with stakeholders quickly without having to write (and read) overwhelming amounts of text.
Quality over quantity: Have the right followers

• Do they re-tweet your messages to amplify your cause to an interested audience?
• OR are they just following you in hopes you’ll follow them to look big to their audience?

Look for followers who talk about things that are relevant to your cause and/or community. Those are the connections really worth having and learning more about.
Inspire Through Your Facebook Page

• Grow your **community** of like-minded people
• Share meaningful experiences

**Expert Tip:**
Create *Impact Videos* and share them to your Facebook page, directing fans to your *donation page.*
Set up the right type of account!

- **Facebook Group**: Useful for group communication to people who have a particular **common interest**.
  - Features:
    - Email all members
    - Make the group private, providing a feeling of exclusivity

- **Facebook Page**: Useful for most organizations for **increased reach** and **visibility**
  - Features:
    - Anyone can like a Page to show their support and read what you’re posting without being a fan or liking your Page.
The majority of nonprofits say **Facebook** is the most important social network for their organization.

**Twitter** comes in second, with **YouTube** in third.
Questions?

Please send them in the chat!
CONTACT

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2nd Edition
Cause Selling textbook
Now available on Amazon!

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BE AN AGENT OF CHANGE.
CHANGE THE STATUS QUO.
Learn how to develop and nurture donor relationships to advance your cause in today’s giving landscape with Cause Selling the Sanford Way: A Guide to Relationship-Driven Fundraising.

LEARN MORE AT CAUSESELLING.ORG
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Harassment & Misconduct: It’s not just a “For-Profit” Issue

April 15, 2020
11:00am – 12:00pm PST
2:00pm – 3:00pm EST

Register Today!
Thank you
TAKE YOUR CAUSE AND CREATE IMPACT.

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