August 16, 2013

poisner.com/2013/08/12-tips-for-getting-fundraising-meetings/

One of the biggest keys to successful fundraising is asking people in a meeting for money.

Events, letter, phone calls, and emails all belong as part of a robust, comprehensive fundraising system. But thriving organizations almost always find that one-on-one solicitations are where they secure most of their unrestricted funds.

Many fundraisers I train believe that making the ask at the meeting is the easy part – where they profess to get held up is in getting the meeting in the first place.

Here's a dozen tips for how to get the meeting

1. Make sure you're working connections and not cold prospects. If they're not current donors, you should focus on people you know, or having someone who knows the donor connect you (either by making the meeting request directly or at least letting you use their name). If you're counting on your board to supply connections and they're not being helpful, find others who will be.

2. Make the request via phone, not email. It's too easy to duck an email and in an email you can't engage them, motivate them, and respond to any misapprehensions they might have about the meeting. Or worse, they may give in response to the email, but at a much lower level than you would secure in a meeting.

3. Start the process far in advance of when you really need the meeting to happen. If you need the ask to take place in November, start requesting the meeting in October. The further out you set a proposed date, the less likelihood that conflicts will get in the way. Or, if you ask for a time 10 days out and they say they are already booked, it gives you an easy (and hard to refuse) follow-up ask for a later time when they're not booked.

4. If they say it's a bad time to talk, ask if you can call back "in an hour/tomorrow.

5. Start by thanking them if at possible. For past donations. For past volunteer work. For some other community work they've done even if not for your organization.

6. Be passionate and upbeat. Passion is contagious and people are more likely to want to spend time with someone if they perceive you as upbeat. You are selling yourself as much as the organization in trying to set up the meeting.

7. Make clear you're looking both for their input and to see how they can help. Propose some topic where you're seeking input (your upcoming or new strategic plan, your communications, ideas, some specific organizational issue, etc.).

8. Focus on their convenience, not yours. Always offer first to meet them at their home, office, or a nearby coffee shop or restaurant. Let them choose. Be willing to meet early in the morning, just after work, or during the evening.

9. Use peer pressure. If you know they're friends/colleagues/rivals of someone else who you've met with or are meeting with, figure out how to drop that into the conversation.

10. Propose a specific date and time. Don't ask: can we meet? Ask: Can we meet on Tuesday the 22nd at 3 p.m.? This "assumption of yes" will get them focused on when you should meet, not whether.

11. If they say something that divulges something personal (e.g. I'm going to my son's wedding"), don't be afraid to follow up with a question designed to make the relationship more personal (e.g. "Congratulations! Where is he getting married?" You should be genuinely interested in them as a person, not just a checkbook.

12. Be prepared to pivot back to a second ask if they initially say no. Most eventual yes's and successful donor visits will start out with donors initially saying "I'm too busy" or "Don't waste your time with me, I'll donate regardless" or some similar statement. Make the case why it's valuable and ask again.

Above and beyond these tips, the most important thing is to be relentless. You will often have to try to call a donor a dozen times before reaching him or her. Don't leave messages and don't give up. Just keep trying at different times and dates.