

FIELD NOTES



A QUICK-READ STRATEGIC RESOURCE
OF DONOR BY DESIGN GROUP

IT'S JUST A CUP OF COFFEE.

For many non-profit volunteers and even staff, the mention of fundraising can bring out a long list of stress-induced excuses.

It's not a lack of passion for the organization, rather a misconception of what they can do to help further the cause.

Assure your volunteers that when you ask them to meet with a prospect (especially for the first time), **it's not to ask for money.** The meeting is an opportunity to learn more about the prospect's interests and connection to your organization and to allow the volunteer share a little about your mission and vision.

Here are a few tips for your nervous volunteers...

FIRST: GET THE MEETING

- Be patient, be persistent and try multiple ways to get the meeting.
- You are setting up a conversation, not an appointment.
- Assure them we are looking for their feedback and they have been identified as a community leader whose opinion matters.
- Don't talk about money.
- Be excited about the organization and they will hear it in your voice!

Congrats: getting the visit is a great indicator of future giving!

SECOND: HOW TO HANDLE OBJECTIONS

It's not easy getting a meeting, even if it is just a cup of coffee. But a few simple phrases can help volunteers handle objections.

"I'm too busy."

This is so personally important to me, I'm willing to wait. When might your calendar have an opening?

"I don't really want to get involved in anything right now."

No problem. We are just looking for about an hour of your time and your perspective.

"I'm not sure if I'm interested in giving to your organization/your project."

Of course. At this point, we are sharing our vision and asking for feedback from key community leaders/influencers. We are not at a point where we are ready to fund raise. (This is especially applicable if you are in the early stages of a capital campaign and simply want to share the vision.)

THIRD: THE CONVERSATION

A few key questions will help your volunteer learn invaluable information about a prospect and how they might joyfully support your organization.

- What is your story related to our organization?
- What do you know about our organization?

- What is the reputation of our organization?
- (After you share the plan/vision): What do you like? Would you change anything?
- What are some of our most pressing community needs?
- Is there anyone else we should be talking to?
- How can we best keep in touch?
- Would you like to come tour our organization with me sometime?



NEXT: KEEP IN TOUCH!

Now that your volunteer knows more about the prospect's interests, they can have more personal conversations connecting them to your organization. After enough meaningful interactions, asking them to support your mission will feel like a natural next-step in the relationship. But that's a conversation for another day...

Looking for ways to take the fear out of fundraising? Contact us for more information on trainings, consulting services and resources to help your volunteers succeed!

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