

Face-to-Face Solicitation – Your Job as a Solicitor

Thank you for agreeing to be a solicitor!

- First, you are a storyteller. Your job is to tell a story about the organization that resonates with you, and will resonate with the prospect.
- Simultaneously, you are a listener and observer. Listen to and watch the prospect.
- And you are an engager. Engage the prospect in a dialogue about the organization. Remember! A solicitation is a conversation, not a presentation. Ask questions. Engage the prospect. Find out what the prospect cares about.

Your resource materials

- Your brain, heart, personal experience, and passion. That's what is most important!
- The organization's *case statement*
- The *solicitation tips* that are attached to this document (pages 3 and 4)
- Prospect sheets (You will select your own prospects. Your staff has made some preliminary recommendations and will review these with you.)

Your job

1. Give your own gift before you ask others to give.
2. Get a meeting with the prospect – preferably in person. If necessary, over the telephone. The key is, a special meeting to discuss giving to the organization.
 - Tell the prospect why you want to meet with him/her/them: To tell you how we have used your prior gifts. To provide you with an update on our accomplishments. And to speak with you about another gift.
3. Tell the organization's story and engage the prospect in conversation.
4. Ask for the gift. (And ask for the specific amount suggested on the *prospect sheet!*)
5. Get the answer regarding the gift.
 - Don't settle for letting the prospect decide later and mail in the gift. You've lost the power of face-to-face solicitation. If the prospect wants to think a while, set up a time to call back.
6. Report to the organization office with your results.

Your steps

1. First, review the case statement and highlight the key points that you want to cover.
2. Identify some stories you can tell the prospect, based on the prospect's interests and aspirations.

3. Review the *prospect sheet* so you are familiar with the background. Call the office and get more information if you need more to feel comfortable.
4. Call the prospect and set up a meeting. (If absolutely necessary, solicit over the telephone when the prospect will give you 15 minutes or so. But it's best to do this face-to-face: over lunch, over a cup of coffee, at the office, etc.)

Key points for you to remember about soliciting

1. It's okay if you don't know all the answers.
 - Just smile – and say that you will get back to the prospect with the answer. Then call the office and get the answer. Call the prospect back – this is great – another chance to ask for the gift and develop the relationship!
2. Always ask for a specific amount – and that should always be an increase over prior gifts. (See specific amount on the *prospect sheet*. This amount was determined by an analysis of the prospect's gift history and what the organization knows about the prospect.)
 - Industry standards say that 15% of the time, you'll get an increase! And the rest of the time, you'll likely get the same gift as last year. Asking for an increase is the only way to get one – and is an excellent strategy to maintain the same gift level.
 - Use the phrase: “Would you please consider giving \$___.”
 - If the gift is “large”, ask the prospect if s/he needs additional time to pay the gift. Specify by when you want the gift paid. (The organization has to decide if it wants pledge payments and over what time period.)

Key points for you to remember about the organization

- See resource materials developed for your solicitation program.

At the meeting (whether in person or on the telephone)

1. Start out by saying thank you! Thank you for the time and thank you for the prior gifts.
2. Remember: This is a conversation, not a presentation. Engage the prospect in a discussion. Listen. Watch the body language. (Or listen to the hesitations or enthusiasm.)
3. Explain your role as a volunteer. Talk about why you believe in the organization's program. Mention your own gift in the context of your commitment to the cause. (Not the amount but that you gave money and do so every year.)
4. Talk about the community desire for and response to specific services offered by the organization. Highlight a favorite story or program at the organization.
5. Talk about how the organization will use the money. (Look at the case statement – show the *case statement* to the prospect. Leave a case statement with the prospect.)
6. Ask for the specific amount noted on the *prospect sheet*.
7. Get a commitment to you, before you close the meeting. (Or arrange to call back later to get the answer.)
 - Don't leave a gift envelope with the prospect - without a specific amount pledged. It is important that the prospect make the financial commitment to you directly.

Yes! You can ask for (and get) big gifts.

Suggestions for Effective Solicitation

There is only one way to solicit a large* gift: call in person!! Describe your project and the way it helps to solve a community problem; match the prospect's needs to those of your cause; and ask for the prospect's support.

Be interested in the prospect. S/he gives because of personal interest and need. Can you meet that need? * P.S. Remember - "large" gift depends upon your organization's size and needs.

1. Pick the right prospects

- a) It is the appropriate contact that makes the difference in fundraising (and almost everything else!)
- b) Keep this mantra in mind: The right prospect asked by the right solicitor for the right project at the right amount at the right time.

2. Solicit in person

- a) Face-to-face solicitation is the only method. The job is too important and the stakes are too high for it to be done any other way.
- b) Beware: When making the appointment, don't accidentally end up soliciting the prospect over the telephone. Present the information and the request in person. The prospect will respond more favorably.

3. Convince yourself first

- You'll be on firmer ground when soliciting others if you have already made your own commitment. This enhances your ability to convince others. Your gift lends credibility when you ask others to give.

4. Know your cause and tell a good story

- a) Be knowledgeable about the problems and opportunities and the role that your organization plays in responding to this situation. Be familiar with the organization's programs and services. Read the support materials before you begin soliciting. Use these materials in your discussion with the prospect.
- b) And most especially, tell a story about real people who are helped by your organization. Tell a good story and people will respond.
- c) Don't worry if you don't know some answers. That's fine – even good! Tell the prospect you'll get the answer and call back later. Another contact is good.

5. Know your prospect – their motivations, aspirations, interests and disinterests

- Think about their possible motivation(s) for participating in addressing these community issues. Draw on their experience and interests in your discussion.

6. Ask for a specific amount - and secure a promise

- a) Use the phrase: "Would you please consider a gift of \$ ____."
- b) It is crucial to ask for a specific amount. People are more comfortable when you give them a sense of what is expected - then they can make their own decision.
- c) Get a commitment of a specific amount before you end the solicitation. If the prospect needs time to think about an amount, tell him/her you will call back in a few days to get the specific pledge. Then call back.

7. Know your job

- a) Focus on your job as a solicitor. You are wonderful and your work is important.
- b) Stick to the campaign timetable. Don't wait too long to make your calls. Get them done early!
- c) As soon as someone has pledged a gift, call the organization office with the amount. The office will then send an acknowledgment letter.
- d) Please, do not wait until later to call the office when someone pledges. That means the donor doesn't get a thank-you letter until later. And that's very unfortunate.

8. At the meeting

- a) This is a conversation, not a presentation. Engage the prospect in a discussion. Listen. Watch the body language.
- b) Explain your role as a volunteer. Talk about why you believe the organization's services are important. Mention your own gift in the context of your commitment to the cause.
- c) Talk about community issues and how the organization can help respond to the community issues. Discuss the organization's programs.
- d) Remind the prospect how his/her gift will help respond to this community problem. Talk about how the gift will influence other gifts.
- e) Ask for the specific amount.
- f) Aim as high as you can. Challenge and stretch the prospect.
- g) Get a commitment to you, before you close the meeting. Don't leave a gift envelope with the prospect - without a specific amount pledged. It is important that the prospect make the financial commitment to you directly.

What if...contingency plans!

- a) Don't just accept a gift that is too small. Try first to negotiate it up.
- b) Don't just accept a "no." Keep telling the stories. Ask if you can come back in a month and ask again.
- c) If the prospect agrees to consider your appeal but wants to take more time to decide, make arrangements to follow up personally and secure the final decision.
- d) Remember, your job is to get the answer - not just ask!

After the meeting...

- Report in! Call the office immediately and report your results. The office will send out a thank-you note. (Remember: the faster you notify the office, the faster the donor receives an acknowledgement of the gift!)

For more information, call the organization's office.