

Anatomy of a Phone Solicitation

1. PREPARATION
 - a. Know your product (for example: Beth Tfiloh) review brochures and phone mat to understand how Campaign dollars impact the Beth Tfiloh community
 - b. Know your process – what goal am I trying to accomplish – connect personally, connect them to BT and close gift
 - c. Know your prospect – what age are their children, are they members of the Congregation, are they involved in Sisterhood/Brotherhood

2. OPENING
 - a. Identify yourself as a volunteer
 - b. Make it personal
 - c. Make it upbeat – **your smile is transmitted through the phone**
 - d. Flatter, be enthusiastic (e.g. I chose your card b/c of your past support, I chose your card because I know how committed you are to Beth Tfiloh)

3. PRESENTATION
 - a. Make a connection (e.g. our kids were in soccer together; I sit near your wife in shul)
 - b. Create a conversation with an open ended question (how, what, why)

4. ASK
 - a. Would you consider a gift – these words remind them it is their choice - you are asking them to consider
 - b. If it makes sense, ask for the increase amount only (e.g. Would you consider an increase of \$50?)
 - c. After the ask, **remain silent**

5. NEGOTIATE
 - a. 3 F's - Feel, Felt, Found
 - I know how you feel
 - I have felt that way myself
 - But what I have found is...
 - b. ABC – Always Be Closing
“And that’s why I’m asking you to consider a gift of _____”

6. CLOSE
 - a. Thank you for the gift
 - b. Confirm amount and address
 - c. If the donor is not willing to commit to a gift tonight – offer to take their card and call them back at a later time.

Steps to a Successful Face-to-Face Conversation

The following are well-tested strategies that work! Prospects seen face-to-face through this method pledge on an average, 40% more than the year before.

Stages to a Successful Face-to-Face Appointment Making:

1. Be Prepared

Before picking up the phone:

- a. Know yourself, your prospect, your purpose, your product
- b. Have several possible dates and times to get together
- c. Be upbeat, positive, personal, persistent - The 3 P's
- d. *Know what you want*
- e. All you want is time, the appointment; not money or closure

2. Open (establish rapport)

- a. Identify yourself
- b. Personalize, make the prospect feel good

Examples:

Sarah – you are so committed and involved. I want to talk to you and get to know you better.

Joseph – I chose your card on purpose because you are so generous, you are so devoted to your community, and you do so much for so many.

And if you do not know the prospect:

Robert – I've always wanted to meet you, I've heard too much about you

Carol – I took your name on purpose because our kids are friends, you live nearby, we don't really know each other but I'd like to.

3. Presentation

The ask should be personal.

- a. Ask as a personal favor to you to give you time
Example: I promised myself I would see five generous contributors. It would mean so much to me to meet with someone like you. I would truly appreciate 15 minutes of your time as a favor to me.
- b. Present two already picked times you can meet
Example: Would Tuesday, at 8:00 at Dunkin Donuts be good or Wednesday, at 12:00 for lunch. (2 choices are harder for one to say no)
- c. Let donor know that at the meeting we will talk about his/her Annual Campaign Gift

4. Negotiations/Objectives

- a. *I know what I'm going to give.* **Response:** All I ask is that you meet with me for a cup of coffee. What you give will be your decision.
- b. *I'm too busy.* **Response:** I know, I am busy too, but I'll make it convenient for both of us. How is 12:00 at your coffee shop Thursday?
- c. *Put me known for the same as last year.* **Response:** Thank you! It is a wonderful gift! Just meet with me so I can fulfill my obligation to myself.

5. Thank you and confirm time and date

6. The ASK

At the meeting (solicitation or conversation)

- a. Set a positive and comfortable rapport
- b. Be yourself
- c. Ask open ended questions
 - Why do you give year after year? How did you get involved in Federation work? What impresses you about our community? What do you remember about our mission to Israel?
- d. Let the prospect take about his interests, his stories
- e. Engage in a positive, prospect driven Jewish conversation. The donor will convince himself of the need to give.
- f. Look for common ground, shared commitment , similar motivations
- g. Once establishing a reason to give:
 - Would you *consider* increasing your gift by \$200?
 - always say consider
 - give a specific amount
 - wait- **BE SILENT** after the ask

7. Overcoming Objections

3 F's Feel, Felt, Found

- I know how you feel
- I have felt that way before
- But I have found...

Convert objections into reason to give/meet

8. Closing

Thank you very much!

Reiterate the benefits of Beth Tfiloh and of his/her gift

9. Follow up

- a. Jot a note of thanks for the time and fits, mention something personal about your conversation
- b. Stay in touch
 - You'll want to after this positive, shared experience connected relationship