

## SOLICITATION SKILLS Tricks of the Trade

*Be ready to inspire and to be inspired!*

- Start with yourself
- Before you begin asking other others for their gifts, consider why you give and to able to tell your own story:
  - How have you benefited from the community?
  - What sparked your involvement?
- Face-to-face when possible because:
  - It is an opportunity to create a relationship
  - Better results are achieved
  - Your passion will come through

### The Solicitation “Tried and True” process

1. Preparation
  - Research the donor’s interests and past giving
  - Know the community’s needs and priorities
  - Know the Tried and True process
2. Open
  - Identify yourself as a volunteer
  - Personalize, make the prospect feel good
3. Presentation
  - Ask open ended questions to lean more about the prospect
  - Why are you involved in the Jewish Community?
  - What makes you a giver year after year?
  - How do you manage to find time to do everything that you do?
  - Listening is the key to donor relationships

4. The Ask
  - You are one Jew, talking to another Jew on behalf of a third Jew who can't speak for her/himself
  - It's not about the money; it's about what the money can do.
  - If you don't ask, you don't get!
  - Use words such as:
    - On behalf of...  
(Making it clear you are asking the community, for people in need)
    - Consider a gift of...  
(Communicating that this is something meaningful to think about)
  
5. Negotiations
  - Objections can be useful to continue the dialogue
  - Objections can build trust when you respond with concern and personal reflection
  - The 3 F's: Feel, Felt, Found
    - I know how you feel
    - I have felt that way myself
    - But what I have found is...
  - ABC - Always Be Closing  
"And that's why I am asking you to consider a gift of \_\_\_\_\_"
  
6. The Close
  - The way you began: positive, personal and complimentary
  - Ask if you can do anything for her/him
  - Leave with mutual good feelings about the relationship, connection and solicitation
  - Thank them

### Helpful hints

- Do's
  - Be open, interested, engaging
  - Be prepared, personal, passionate, purposeful
  
- Don'ts
  - Argue, interrupt, rush
  - Take objections personally

## STEPS TO A SUCCESSFUL CONVERSATION

Linda Adler Hurwitz

The following are well tested strategies that work! It is a proven process!

It raises funds and raises Jews

1. PREPARATION
  - a. Know you as a person
  - b. Know this individual Prospect
  - c. Know Product
  - d. Know Process
2. OPENING (establish rapport)
  - a. Identify yourself
  - b. Personalize, make the prospect feel special
3. PRESENTATION
  - a. Establish connection
  - b. Create conversation
    1. Ask open ended questions beginning with How? What? Why?

- c. Present the case for giving using this prospect's individual interest

#### LET'S TRY IT

#### 4. ASK/NEGOTIATION

- a. The ask

On behalf of our community, would you consider an increase of \_\_\_\_\_, less than \_\_\_\_\_ a week.

- b. Negotiate

1. 3 F's - Feel, Felt, Found
2. Look at objections as reasons to give
3. Then why do you give?

#### 5. CLOSE

- a. Thank
- b. Reiterate - gift , appreciation, address
- c. Suggest involvement

#### FOLLOW UP:

1. Handwritten thank you note
2. Invite to join you at an event

## FACE TO FACE

Same solicitation stages, but different purpose: To get an appointment!