

# 30 EASY

'Get the Visit' Major Gift Strategies



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# Introduction

Major gifts begin with **“Getting to Know You.”** If you want to be a successful major gift fundraiser, stop worrying so much about the ask and think more about securing the “getting to know you” visit. **If you can get a visit with a donor, you have an 85% chance they’ll make the gift.**

Who says? Veteran major gifts guru [Jerold Panas](#), that’s who. He also says, *“To milk a cow you must sit by its side.”*

It’s common sense really. Yet, somehow, it’s easy to throw common sense out the window when it comes to asking for a gift — which many people are deathly afraid to do.

If you’ve ever heard a board member, staff member (or even yourself) say, *“I’ll do anything but fundraising,”* you’re not alone.

There’s a simple way to set yourself up for success so you’ve nothing to be afraid of. And it’s similar to knowing when to ask a friend for a favor, and feeling comfortable doing so.

**You have to get to know people before they’ll be interested in investing more time in you!** And ... getting to know people is pretty fun stuff.

This ebook outlines several effective ways to get started, along with 30 strategies to ensure you get a visit with major donors. Implement them as part of your fundraising campaign, and you’ll start building meaningful connections to help support your cause.



# Successful Major Donor Solicitations Aren't Matches Made in Heaven

**They're matches made on the visit(s).** Visits where you align the values your organization enacts with the values your donor wants to enact.

**All successful fundraising is a value-for-value exchange.** Until you know where your donor's passions lie, this is very difficult to do well. You might receive a gift, but it won't be the most passionate one you might be able to secure if you better understood what floated the donor's particular boat.

**You need a visit. Sometimes several visits.**  
**TRUE STORY:** Five years ago, San Francisco Conservatory of Music President David Stull walked into a breakfast meeting to ask board member Bill Bowes for \$10 million to \$15 million to buy land for a student dorm. Bill wasn't that excited about the project, and offered \$5 million.

Stull persevered. He followed up with this response: 'Bill, we need to act, and if we don't find real estate and buy it, it won't matter what our aspirations are, because there won't be land to acquire, no matter how much money we have. We need to get there, and we need to get there fast.' Bowes took it all in without changing his expression, and responded, "Yes, that's correct."

Stull has a voice made for radio and a dramatic delivery. By the time he finished his pitch, Bowes had gone from \$5 million to \$16 million as a start. They were able to acquire a piece of real estate in a very hot bidder's market, all because they had this pledge. Then an adjacent piece of property came up. An exciting opportunity.

Over a series of meetings, Stull persuaded Bowes to pledge \$46.4 million, about half the total cost of the capital campaign. When asked why he made the gift, Bowes' answer was simple: "*Music makes me happy.*"

This story makes me personally happy, because I led development initiatives for the Conservatory for four years early in my career. Way to go!

# Get Up Close and Personal

To quote fundraising guru Tom Ahern, *“I pay attention to what interests me and what interests me most is me. Ask anyone.”* We are our favorite topic of conversation. [Humans spend 60% of all conversations talking about themselves.](#)

With smaller donors, “getting to know you” can be accomplished online or through mail. Use donor surveys, ask for comments on blog posts, include return postcards or response cards in mailers, ask for email feedback, and solicit social media actions. With major donors, you need to have a conversation.

Why? So the donor can talk, rather than you. So you can listen ... and observe their body language. Otherwise, you’re mostly broadcasting, talking and looking at yourself. You need to look at your donor, and give them time to talk about themselves.



# You Don't Schmooze? You Lose!

There's actual research showing the benefits of schmoozing. Which is what a visit is all about!

**Establishing rapport with another person really does alter behavior** ... in a positive way. When people get to know each other, they tend to work towards a mutually satisfying outcome. They come to trust each other, and are inclined toward more fairness, respect and accommodation.

When you rush to get down to business — like making your encounters with donors all about the monetary ask — you don't end up with your best outcome.

## Why You Must Ask for Advice

Perhaps you're familiar with the old adage: *"If you want advice, ask for gifts. If you want gifts, ask for advice."* It's true!

Hence, the "advice" or "thank you/getting to know you" visit. Not the "let me update you" visit.

**If you tell me you want to update me on your work, I'll likely tell you to send me something in the mail.** Or point me to your website. But if you ask me for my advice or opinion, now you have me intrigued.



# 30 Easy “Get the Visit” Major Gift Strategies

Ready to get started with those great conversations with donors? Here are 30 tips to help you take the next steps toward a visit with major donors.

## 10 Methods to Get the Visit

1. Call to say thanks for support and invite for a visit

2. Pre-call letter (“I will call you next week to set up a visit to get to know you better ...”)

3. Email (“I would love to get your advice if you’ve got 20 minutes for a brief visit ...”)

4. LinkedIn message or direct tweet (“Can I give you a call to get some feedback?”)

5. Meet donor at event and ask if you can call to set up a visit

6. Ask board member to introduce you

7. Ask another donor to introduce you

8. Ask a staff member to introduce you

9. Ask a volunteer to introduce you

10. Phone call follow-up



# 10 Openers to Get Your Foot in the Door

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## Ask for Advice

11. “You know our community so well; I would love your input on any needs we’re not addressing as well as we could be.”

12. “You’ve been a long-time supporter, and I’d love to get your take on ...”

13. “I know you’re interested in our seniors program. We’re considering a new service, and I’d love to get your thoughts.”

14. “We’re in beta on a new website, and I’d love to come over and walk you through it to get your feedback before we go live.”

15. “We’re considering building an endowment, and I’d love to hear your thoughts.”

## Thank You or “Getting To Know You”

16. “I’m new here and my job is to get to know our loyal supporters (board members, committee members, donors, volunteers, alumni) so you can see the impact you’re making.”

17. “I want to personally thank you for your past support and learn more about your personal interests.”

18. “Every donor has a story to tell about their connection to \_\_\_\_\_ (name of organization). I want to hear yours.”

19. “You’ve long supported our mission, and I’d love to learn more about why this cause is near and dear to you.”

20. “I’ll be right near you (in your city, by your office, home, etc.) and would love to drop by to get better acquainted.”

## 10 Calling Tips



21. Identify yourself (as staff, board, volunteer, etc.).

22. Ask if they have a moment to talk.

23. Begin by thanking donors for their support; volunteers for their service; and community members for their leadership.

24. Let donors know right away you'd love to meet them in person (tell them their feedback is too important to you for just a phone call).

25. Have suggestions ready as to where and when you might meet, and a plan B.

26. Leave a simple message with your purpose and call back number if you get voicemail.

27. Smile, even if you get voice mail (it adds warmth and a conversational tone to your voice).

28. If you don't hear back, call again a second and third time.

29. Call at different times of the day.

30. Commit to a call routine (e.g., dedicate a 30-60 minute window of your day when you are at your most energetic).

# Sample Scripts

Here are a few scripts you and your volunteers can use when calling prospective donors to invite them for a face-to-face visit. This might be an intimate event, a tour, or a one-to-one get-together.

## Invitation to an Intimate Event

*“Hi Mark. This is Claire Axelrad calling from the XYZ Charity. I’m calling to thank you for your loyal, generous support. You are so important to us, and we want to let you know how much by inviting you to an intimate get-together at the home of one of our board members next month (state date). Don’t worry. We won’t be asking for more money. We’d just love to get your feedback on the work we’re doing and learn more about you.”*

*You’ll have an opportunity to get your questions answered by our executive director, and we’ll also have a few surprise guests I think you’ll be interested to meet. We’ll start with appetizers at 6 p.m. Can I look forward to meeting you there?”*

## Invitation to Offer Advice

With every invitation, especially when you’re working with donors you know fairly well, you might want to have something in mind for which you’re going to ask for specific advice and input. The following are a few scripts to get you inspired:

*“Mark, I have an idea I’d love to bounce off you.”*

*“Mark, we’re thinking about starting a new project and I’d love to get your thoughts.”*

*“Mark, we’re working with a designer on a new newsletter template and I have three options. Would you be available to meet to review them and give me your thoughts?”*

*“Mark, I’d love to pick your brain about something that just came up. I think you’d have a useful perspective.”*



# How to Handle Hesitations

Inevitably, some folks are going to turn down your gracious invitation. They may say “I really don’t need to meet with you. You’ve got my support!” Or “I know what this is about, and it’s really not necessary. Use your time on someone who needs convincing.” So... what do you do then?

*“Mark, thank you so much for your pledge of support. But ... I’m the one who really needs to meet with you. You’d be doing us a great favor. You see, you’re just too important to XYZ for us to not get to know you better. You’re a loyal supporter/community leader, and we’d love to find more folks like you.*

*For that to happen, we need to know more about what engages you. And about what you think might engage others. Maybe there are things we could be doing differently. You’re doing an awesome good deed with your philanthropy.*

*You’d be doing a double awesome good deed by providing us with in-person feedback. Can we find a time to connect? It would really mean a lot.”*





If they still refuse to meet in person, try to schedule a brief phone call – maybe on Skype? It can accomplish the same purpose. If they won't schedule a time, see if they have a little time now ... during the conversation.

Sometimes folks will say their schedule is really busy now. Could you call back in a few months? Or after they return from vacation? What I tend to find is that these folks are always busy or on some vacation or another. So ... how do you pin them down?

Try this out: *“Mark, of course, I totally understand. Can we get something on the calendar now, even if it seems far away? I know it will be here before we know it, and by then other things will be in the way. And meeting with you is just so important to XYZ that I don't want it to fall through the cracks. What you think about our work, and how we're doing it, and how we're letting others know about it, will be supremely helpful to us as we plan ahead to help even more in the months and years ahead. So, do you think you might have some time on X or Y date for me to get your advice?”*

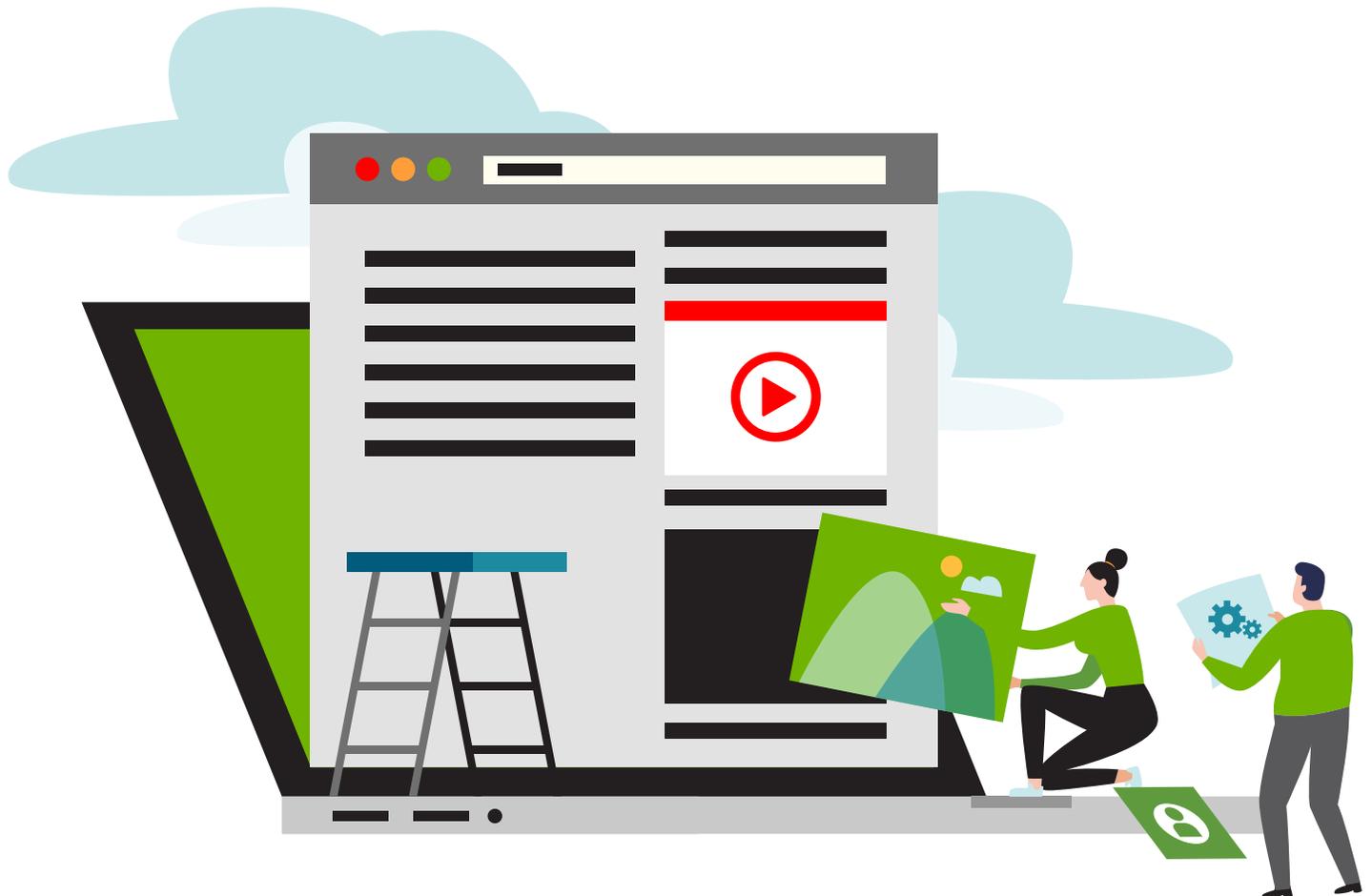
# Bottom Line

Visits are an important part of successful major donor fundraising because they enable you to build a genuine, informed relationship with your supporter.

It's not just about the money. Remember, donors are people first and donors second. People like to be known. And to be known they have to be seen, listened to and appreciated.

Most folks will be willing to talk to you if you are seeking their feedback, advice and counsel.

Asking for a visit is a way of giving your donors a gift — because they get to talk about themselves!



## About the Author



Claire Axelrad, J.D., CFRE, is a fundraising visionary with 30 years of frontline development work helping organizations raise millions in support. Her award-winning blog showcases her practical approach, which earned her the AFP “Outstanding Fundraising Professional of the Year” award.

Claire, who teaches the CFRE course that certifies professional fundraisers, is a regular contributor to Guidestar, Nonprofit Pro, Network for Good and Maximize Social Business. Her passion is coaching nonprofits to address 21st century challenges and overcome barriers to sustainable funding.

[Find out more >](#)

# About Bloomerang

We believe in the value of life with a mission, and we applaud the choices nonprofit organizations make to improve the world.

We exist because they exist. We take great pleasure in creating tools and teaching principles that help passionate nonprofit organizations make smart decisions that are proven to help them reach out, grow and thrive.

**Our Strategic Vision:** to be the world’s best developer and deliverer of tools and perspectives that generate value for nonprofit donor relationships.

**Our Core Purpose:** to improve donor retention in the nonprofit world.

At [Bloomerang](#), we’re helping nonprofits become more successful at increasing revenue. Our user-friendly software is designed to help organizations naturally boost donor engagement, fundraising and retention through best practices and a user-friendly donor database interface.

Take a look at why [Bloomerang](#) has been rated “The Best Donor Management Software” based on user feedback. Explore a demo of our software here.

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