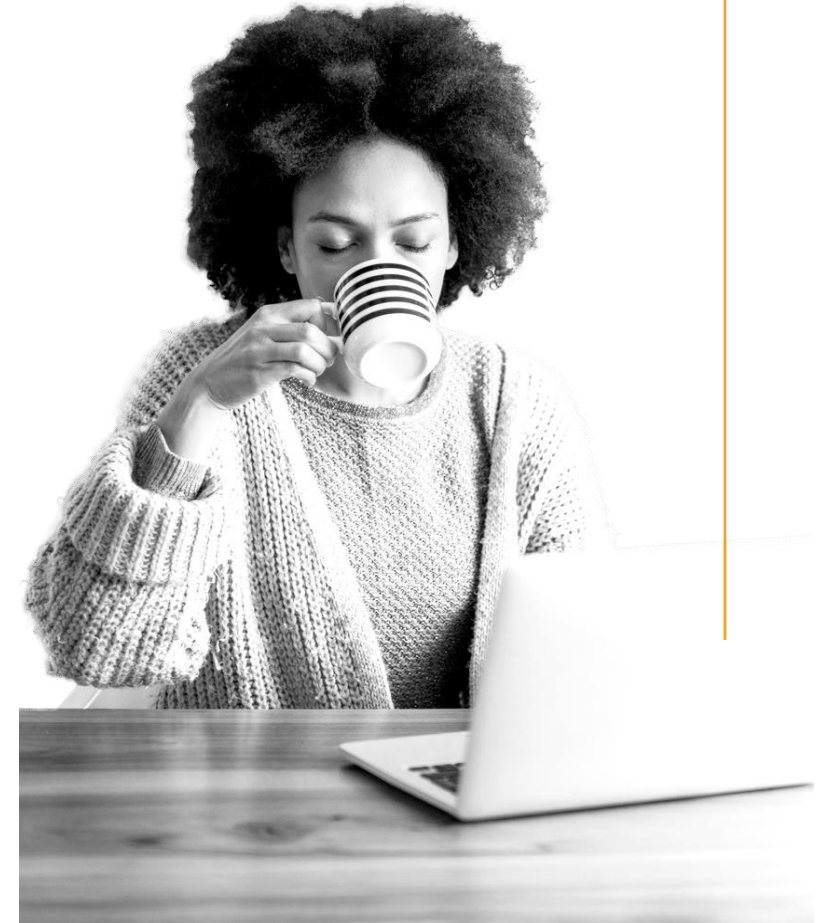


Welcome

We'll be getting started momentarily.

In the meantime, please use the chat to introduce yourself and let us know your name and organization!

Get comfortable
and ready to learn!



**fundraising
academy**
CAUSE SELLING EDUCATION

Candid.



***8 Steps for Cultivating Relationships
with Individual Donors
Part 2: June 15, 2021***

Today's Facilitators



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Programs Manager - West, Candid

Pronouns: she/her



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Grounding exercise

Candid.

What we do

Every year, millions of nonprofits spend trillions of dollars around the world. Candid finds out where that money comes from, where it goes, and why it matters. Through research, collaboration, and training, Candid connects people who want to change the world to the resources they need to do it.

Our response to global events

Thank you for being a part of Candid's learning community. We recognize that this may be a challenging time for many. Candid has shifted its key learning opportunities to a virtual format, and you can check them out at bit.ly/CandidLearningOnline. We've also invested in providing the social sector with the resources they need to make informed decisions about today's most pressing issues:

Learn more about COVID-19 resources here:
<https://bit.ly/CandidCoronavirus>

Learn more about racial equity resources here:
bit.ly/CandidRacialEquity



We are recording today's presentation.



Agenda

Warmup

Overview of steps 4-8 and guided activity

Q&A

Wrap up

Learning Outcomes

- **Explain how selling your cause is a part of fundraising in the social sector**
- **Make the case for the value of donor relationships for fundraising success**
- **Assess your circles of influence to identify prospective new donors**
- **Draft a plan to improve relationships with your existing donors**



The Cause Selling Cycle

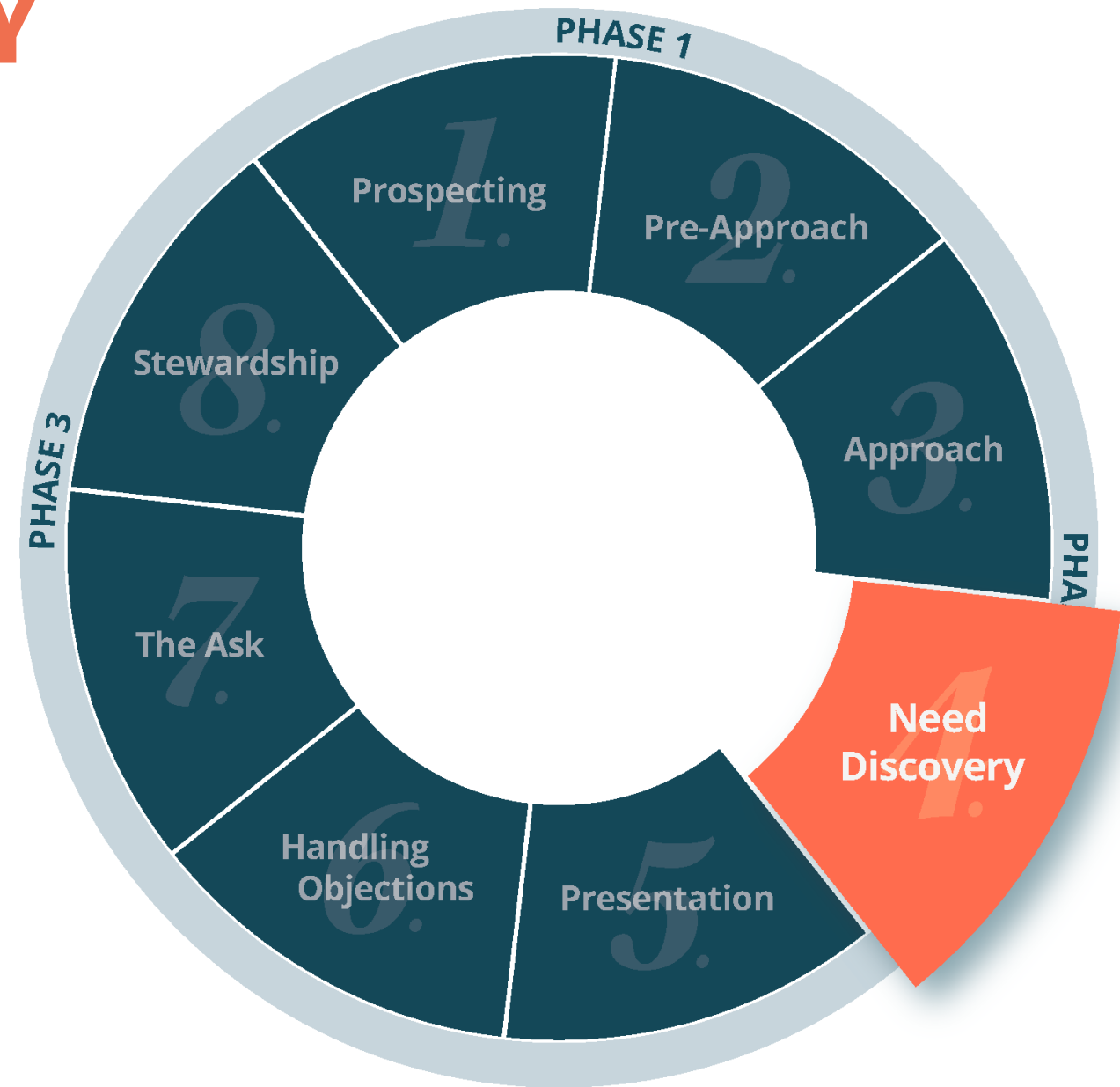


Phase One
Phase Two
Phase Three

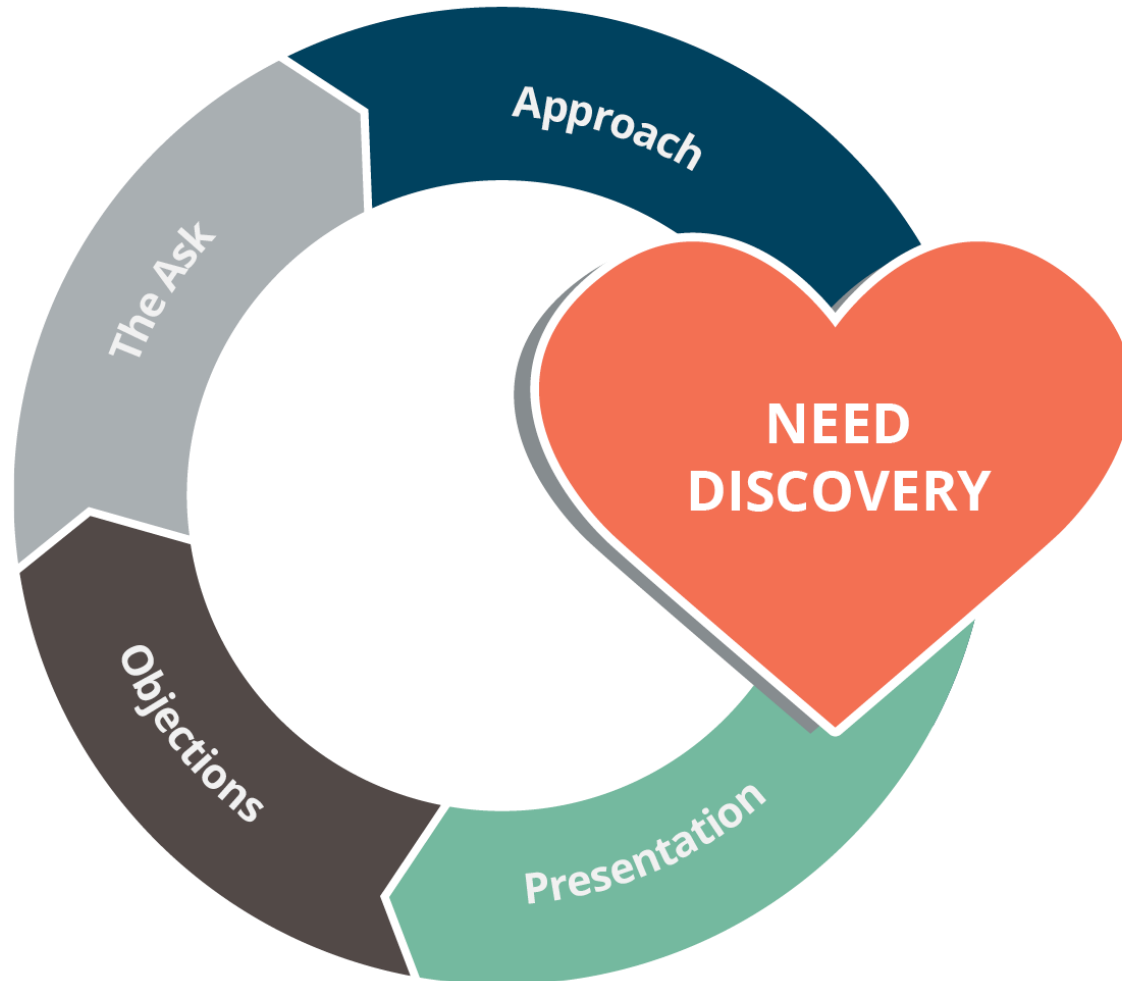
4 – NEED DISCOVERY

The process of becoming aware of the essential connections between your prospect and your cause

*Don't convince; don't tell – **discover with them***



The Heart of the Process



THE CAUSE SELLING CYCLE WON'T WORK WITHOUT ITS HEART.

Because the entire process should be focused on the donor, the Need Discovery step is the critical step! It's there for you to ask questions and get to know your donors so that you can discover what matters most to them.

Tool – Key Questions to Ask

- **Motivation:** Why are you passionate about what you do?
- **Success:** What do you want to achieve?
- **Frustration:** What do you want to avoid?
- **Right fit:** What helps you decide which charities to support?
- **Commitment:** How involved do you want to be in making this change happen?

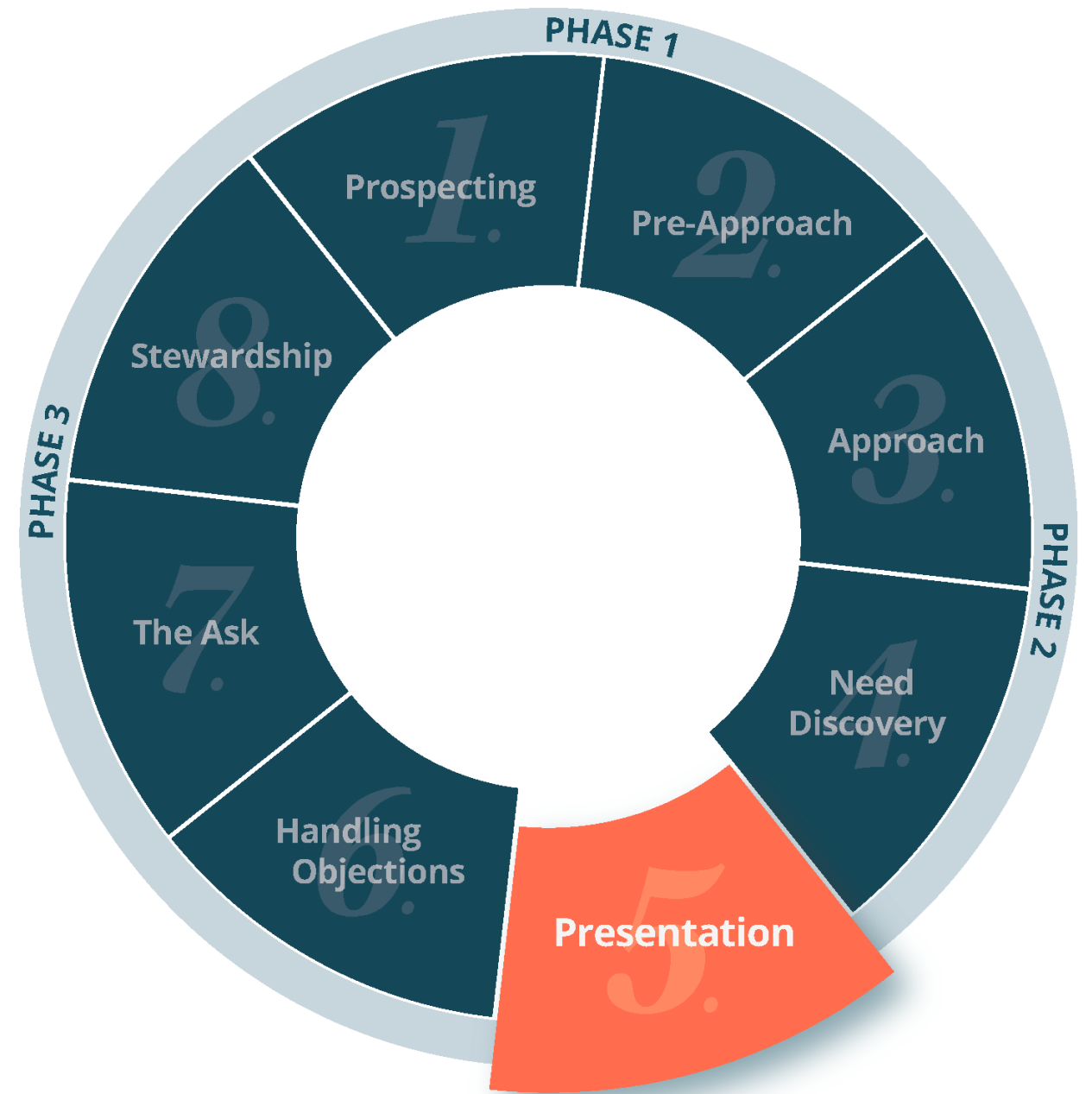
Need Discovery Tips

- Know when to use **open-ended** versus **close-ended** questions
- Use the **double-check**
- Use **nonverbal** gestures
- Don't be afraid of **silence**
- **Keep the prospect talking**



5 – PRESENTATION

Telling a story about the benefits of becoming a true advocate of your cause, building on the connection you've established with your prospect



Truths About Presenting

01

If you don't know your cause, people will resent your efforts to sell it.

02

If you don't believe in what you are selling, no amount of personality or technique will cover that fact.

03

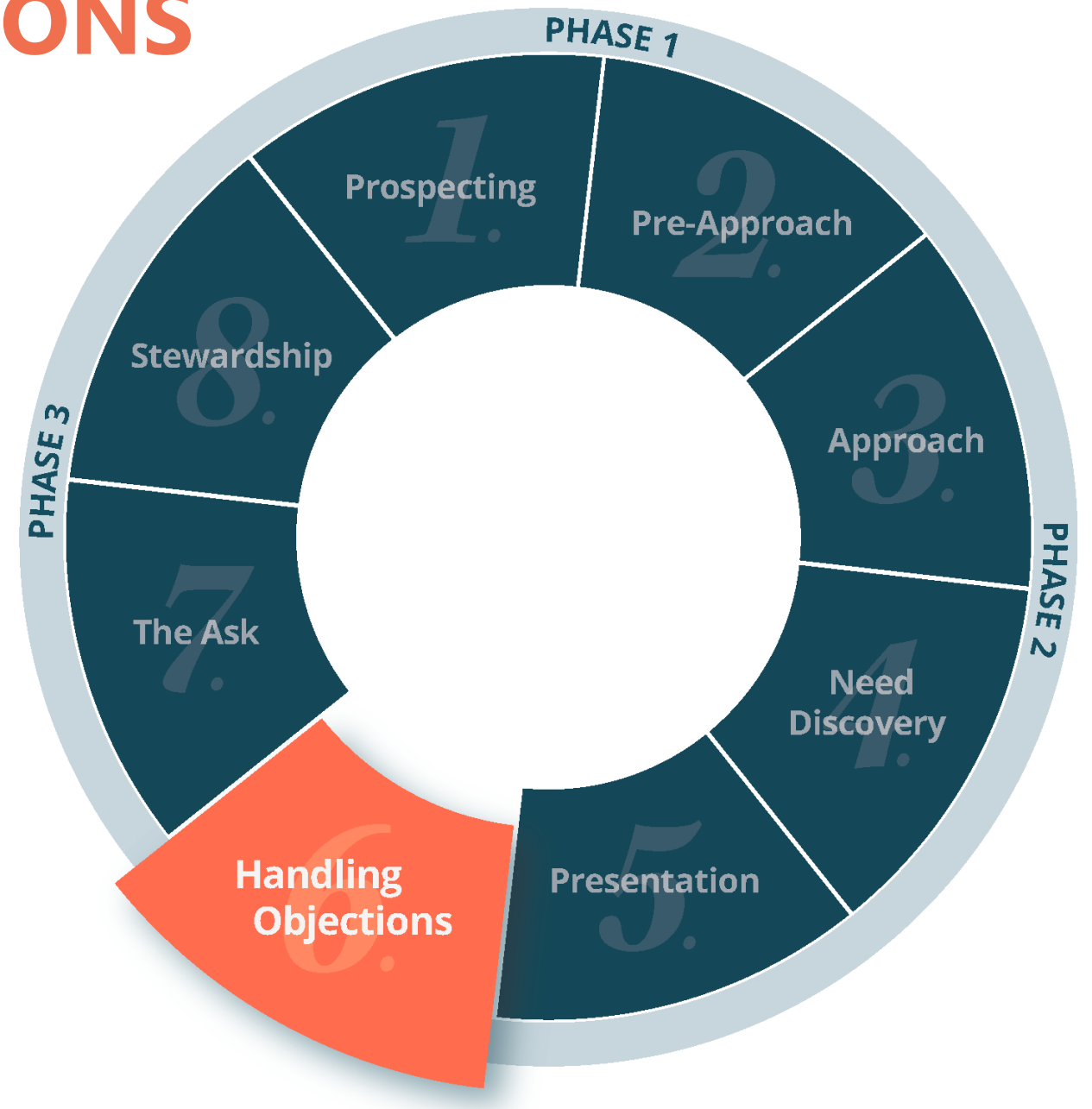
If you can't sell with enthusiasm, the absence of it will be infectious.

TAKE HOME ACTIVITY: Crafting Your Elevator Pitch

6 – HANDLING OBJECTIONS

Objections reveal interest. They are an opportunity to discover what the prospect is really thinking.

With the right attitude, they make your close even stronger.



Categories of **Objections**

- Objection to your **cause**
- Objection to the **fundraiser**
- Aversion to **decision making**
- **Gift** objection (possibly hiding real objection)



How to Handle **Objections**

1. **Hear** the prospect out
2. Confirm your **understanding**
3. **Acknowledge** their point of view
4. Don't let the objection upset you
5. **Answer** the objection
6. Attempt to **close**



7 – CLOSING

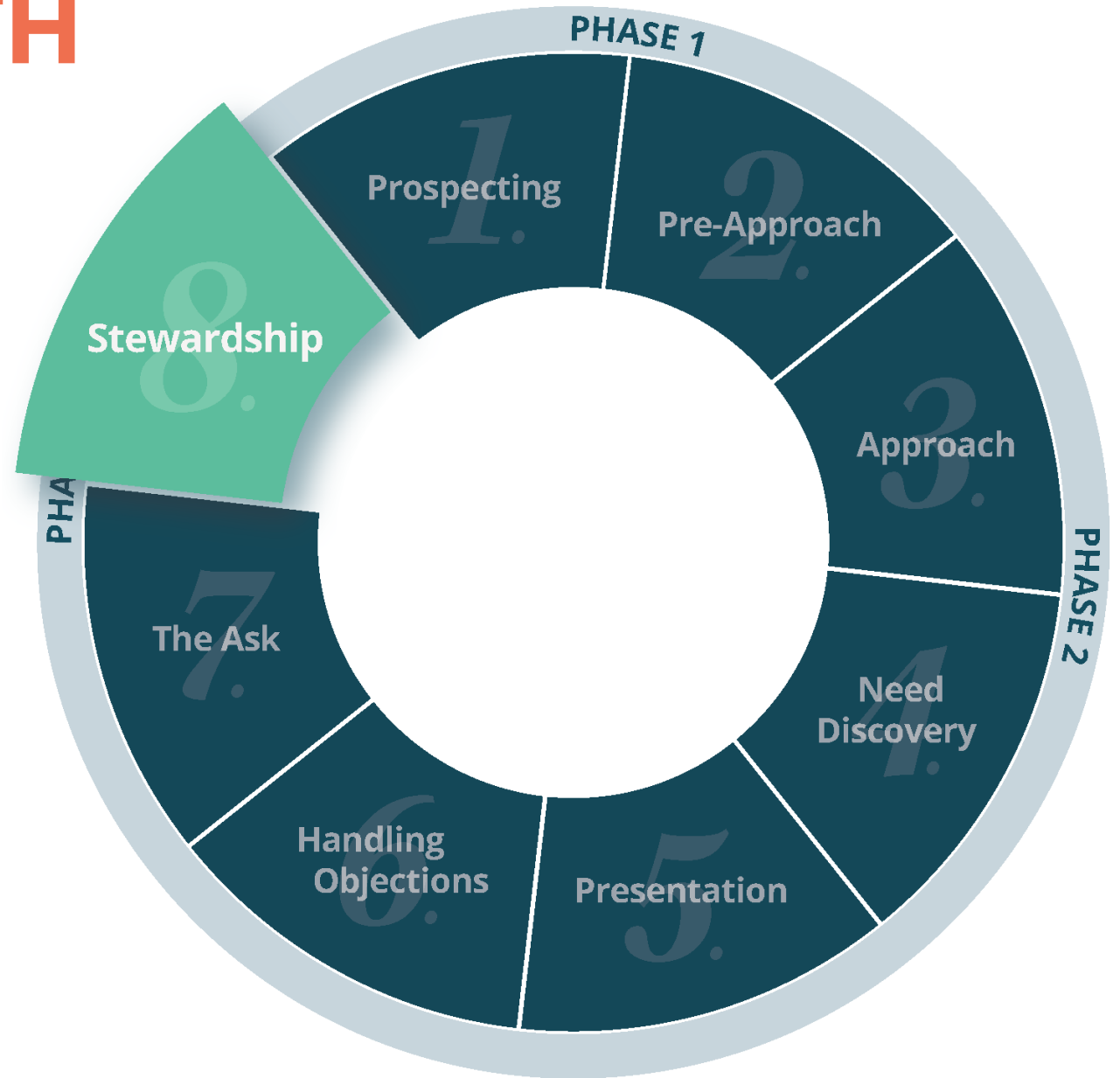
Make the ASK.



Closing

1. Be **assumptive**
2. Provide a summary of **benefits**
3. **Directly** ask
4. **Ask for a specific amount (for a specific purpose)**
5. Remain **silent (Wait for a response)**
6. Stress the **urgency**
7. **No isn't forever**

8 – FOLLOW UP WITH RESULTS



Keys to Follow Up

Think Like a **Donor**

Say **Thank You**

Personalization vs. **Customization**

Pick Up the **Phone**

Treat **Everyone** Like A **Major Donor**



Strategies for Increasing Donor Loyalty

1. Organizational Site Visits
2. Visiting the Donor
3. Regular Contact
4. Being of Service to the Donor
5. Engaging the Donor with the Organization
6. Gratitude and Recognition



ACTIVITY:

DONOR LOYALTY STRATEGIES

RECAP

What did you learn?

Common challenges?

Unique or different strategies?

What can you apply?

Cause Selling Dos & Don'ts

DO

- Treat donors like long-term partners
- Link your cause to your donors' passions
- Provide solutions
- Have regular contact
- Be open and honest
- Say "we"
- Be an enthusiastic ally

DON'T

- Focus only on getting \$\$
- Make exaggerated claims about your cause
- Belittle other nonprofits
- Take donor hesitation personally
- Wait for the donor to call

Cause Selling: 8-Steps Cliffs Notes

1. Find the donor's name (**Prospecting**)
2. Determine donor is qualified (**Pre-approach**)
3. Introduce themselves to the donor (**Approach**)
4. Discover donor's unique passions (**Need discovery**)
5. Tell the story of the mission (**Presentation**)
6. Overcome potential roadblocks to giving (**Objections**)
7. Ask for a gift (**Ask**)
8. Follow up with results to foster loyalty (**Stewardship**)



PERSONAL ACTION PLAN

- The three most important things I learned
- Priority actions I will take when I return to the office
- Resources I need to be successful

Questions?

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bit.ly/CandidLearningNewsletter

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[@Candid_Learning](#)

