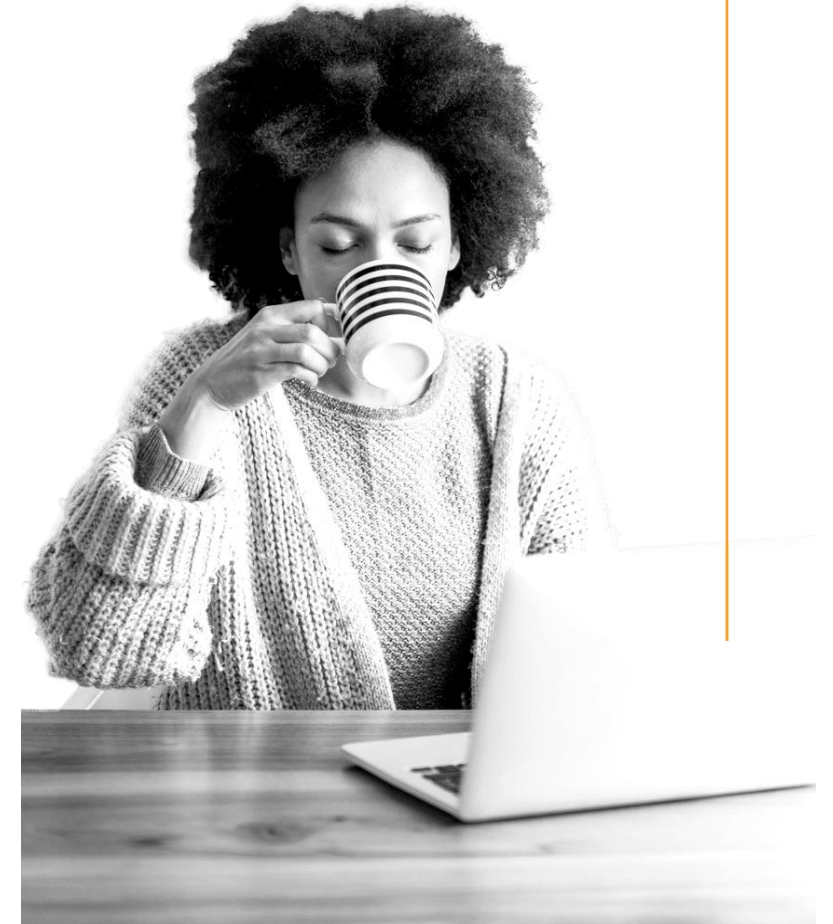


Welcome

We'll be getting started momentarily.

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

Get comfortable
and ready to learn!



**fundraising
academy**
CAUSE SELLING EDUCATION

Candid.



***8 Steps for Cultivating Relationships
with Individual Donors
Part 1: June 8, 2021***

Today's Facilitators



Krista Berry Ortega

Programs Manager - West, Candid

Pronouns: she/her



Laura Bergman

Programs Assistant - West, Candid

Pronouns: she/her

Grounding exercise

Candid.

What we do

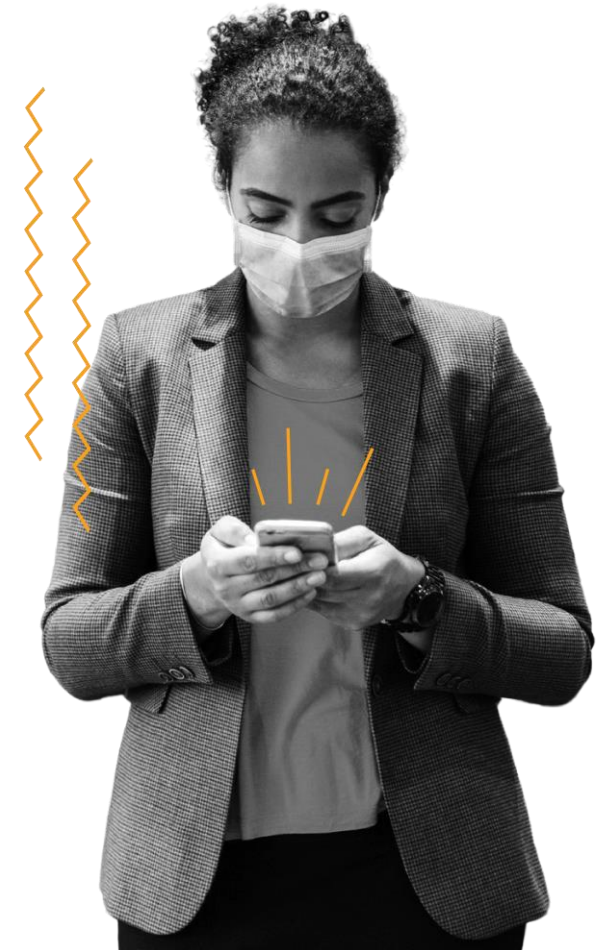
Every year, millions of nonprofits spend trillions of dollars around the world. Candid finds out where that money comes from, where it goes, and why it matters. Through research, collaboration, and training, Candid connects people who want to change the world to the resources they need to do it.

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

Introduction to Cause Selling and the 8 Steps

Overview of steps 1-4 with case study

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**



Share in chat:

What is your experience level with today's workshop topic?

- Very experience
- Experienced
- Somewhat experienced
- New to this topic



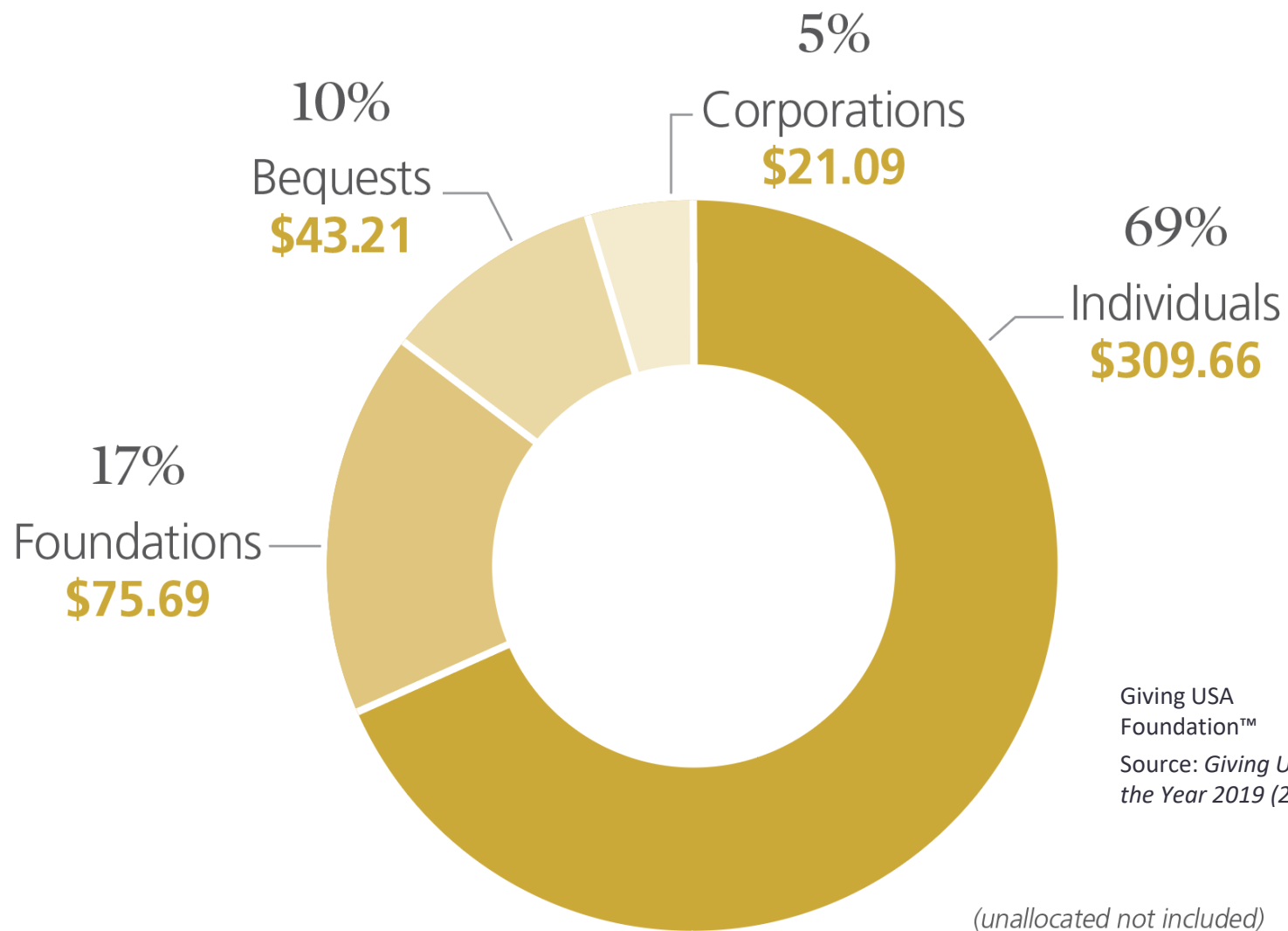
phi·lan·thro·py

Empowering people to follow their passions to make a greater impact on society.

Benevolence, Generosity, Humanitarianism, Public-Spiritedness, Altruism, Social Conscience, Charity, Charitableness, Brotherly Love, Magnanimity, Open-handedness, Bountifulness, Beneficence, Unselfishness, Humanity, Kindness, Kindheartedness, Compassion

2019 contributions: \$449.64 billion by source

(in billions of dollars - all figures are rounded)

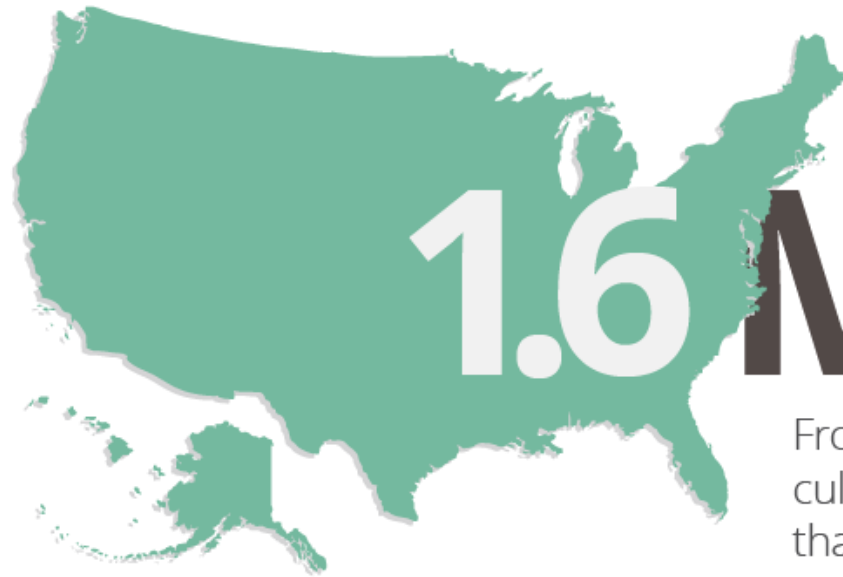


Giving USA
Foundation™

Source: *Giving USA: The Annual Report on Philanthropy for the Year 2019 (2020)*. Chicago: Giving USA Foundation.

(unallocated not included)

© 2021 Fundraising Academy



1.6 Million

From churches to food banks to cultural centers, there are more than 1,570,000 tax-exempt 501(c)3 organizations in the United States.

10%

of the workforce

Behind only manufacturing and retail, the charitable sector is the third largest workforce in the U.S. It provides 11.4 million jobs and employs 10 percent of the nation's population.

WE ALL SELL.

Every single day.

In any position and any career.

From parents to scientists and everyone in between.



QUALITIES OF TOP PERFORMING FUNDRAISERS

- **Exchange** information (rather than “hard sell”)
- Know **WHEN** to close
- **Advocate** for donors
- Provide added **value** to their donors
- **Trusted** within their own organization
- Engage in positive, **relationship-building** behaviors internally and externally

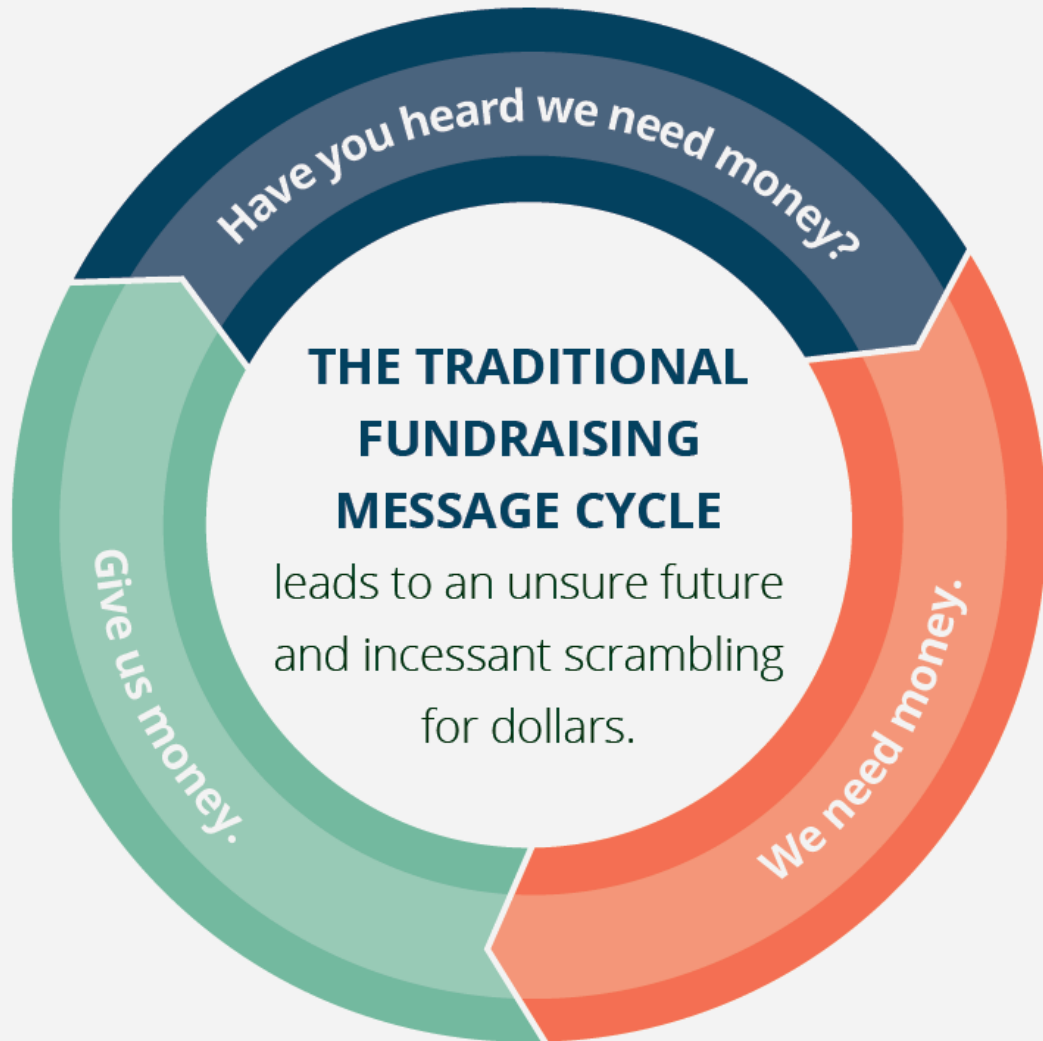
Focus on the
relationship...

not just the money

Cause Selling is a relationship-based program for nonprofit fundraising in **eight steps**.

It uses **entrepreneurial** business development tactics to help fundraisers build better **relationships** and **stronger prospect pipelines**.

The Solution: Cause Selling



Traditional Fundraising vs. *Cause Selling*

PHASES	TRADITIONAL MODEL OF "ASKING"	PERCENTAGE OF TIME SPENT IN EACH PHASE
APPROACH	TELLING	10%
IDENTIFYING NEEDS	QUALIFYING	20%
MAKING THE PRESENTATION	PRESENTING FEATURES	30%
RESISTANCE & GAINING COMMITMENT	CLOSING LONG & HARD	40%

TRADITIONAL ASKING

PHASES	RELATIONSHIP MODEL OF "ASKING"	PERCENTAGE OF TIME SPENT IN EACH PHASE
APPROACH	BUILDING TRUST (RAPPORT)	40%
IDENTIFYING NEEDS	PROBE, ASK, QUESTION & LISTEN	30%
MAKING THE PRESENTATION	SELL BENEFITS	20%
RESISTANCE & GAINING COMMITMENT	REASSURE "MAKING THE ASK"	10%

CAUSE SELLING

The Cause Selling Cycle



Phase One
Phase Two
Phase Three

Why Do People Give?



What is the
number one
reason a donor
decides to give to
a nonprofit?



1 - PROSPECTING

The process of looking for, or searching for, prospective donors



10

Methods of Prospecting



*Master these
techniques!*

-  **1** Referrals
-  **2** Circles of Influence
-  **3** Event Prospecting
-  **4** Direct Email and Mail
-  **5** Social Media

10

Methods of Prospecting

*Master these
techniques!*

-  **6** Warm Calling
-  **7** Networking
-  **8** Organization-initiated Prospecting
-  **9** Your Website
-  **10** Crowdfunding

Circles of Influence



Activity: Your Circles of Influence

Who do you know well enough to ask to connect you to new people?

Who do you need to cultivate this relationship with?

Personal

- Friends
- Family
- Mentors

Colleagues

- Co-workers
- Acquaintances
- Associates

Businesses

- Brands
- Location/
Space
- In-Kind
Donations

Civic Peers

- Other
friends in
leadership

2 – PRE-APPROACH

The planning and preparation done prior to contact with the prospect



Pre-approach Checklist

- **Who drives philanthropic decisions?**
- **Giving history with your organization?**
- **Personal interests?**
- **Passions and priorities?**
- **Other charitable work and giving?**
- **Their connections?**

Pre-approach Information Sources

- **Colleagues**
- **Current Donors**
- **Board Members**
- **Print Magazines**
 - **Donor event coverage**
 - **Socialite magazines**
 - **Civic groups**
- **Online Resources**



Online Resources

guidestar.org

dsgiving.com

fec.gov
(political contributions)

[marquiswho](http://marquiswho.com)
(free trial)

zillow.com
(real estate)

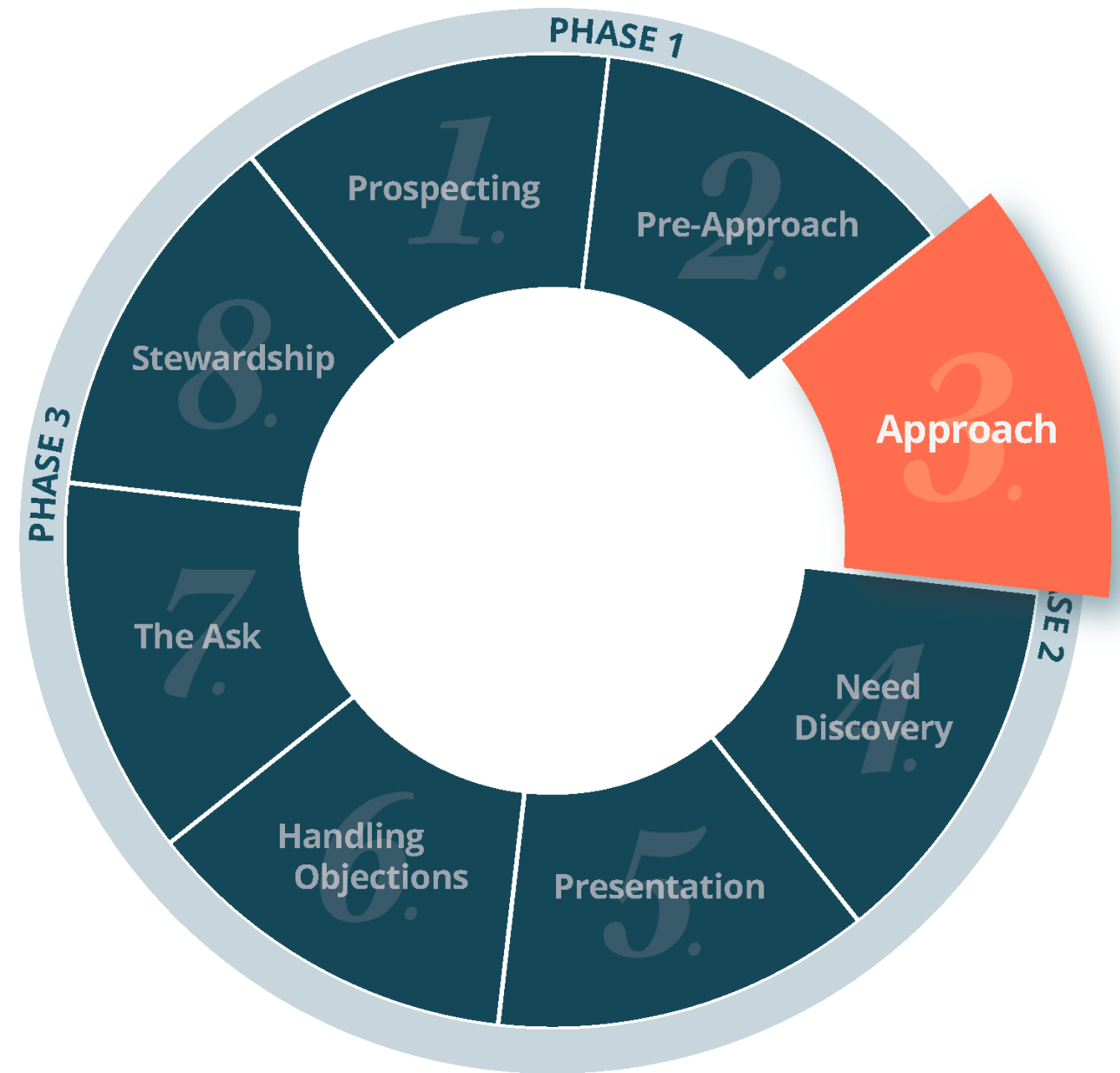
zoominfo.com

LinkedIn

esri.com/data/tapestry/zip-lookup

3 – THE APPROACH

**Speaking to
(and sounding out) your
prospect for the first time**



Types of Approaches

- **Relevant Benefit** - when you know the issues that are of interest to the prospect
- **Impact** - when you know what motivates the donor to give
- **Curiosity** - when you know something personal about the prospect, especially hot button issues
- **Compliment** - signals honest interest in the prospect when sincere, specific, and genuine

Types of Approaches

- **Referral** - borrows the influence of someone the prospect trusts and respects
- **Education** - demonstrates knowledge and expertise
- **Hands-on** - appeals to numerous senses

Remember!

***You Only
Get One
First
Impression***



CASE STUDY

Your long-time donor is bringing a couple from her neighborhood to your next donor reception.

The couple is well-known for their philanthropy.

Your donor is hesitant about bringing this couple because she says they get asked by nonprofits all the time and she doesn't want them to feel uncomfortable.

Ultimately, your donor decides, given your impact this year, now is the right time.

What's next? What do you do?

Questions?

See you next week for
Part 2 (steps 5-8)

Connect with us

Sign up for our online newsletter
bit.ly/CandidLearningNewsletter

Find us on Facebook and Twitter at
[@Candid_Learning](https://www.facebook.com/Candid_Learning)

