

# How To Get in the DOOR

Rebecca Rothey, CFRE, CAP®  
Director of Major and Planned Gifts  
Baltimore Community Foundation

- Discuss the challenges faced when attempting to secure visits
- Explore strategies for overcoming those challenges, including techniques for making calls and other methods for securing visits
- Share some final thoughts

**Today We Will ...**

- Political fundraiser for many years
- Spent two decades doing cold calling
- Since transition to the nonprofit sector have been at human-need organizations with no natural partners
- Even with years of practice, still get that knot in my stomach when calling someone I don't know

## **My Background**

# **The Challenge**

- Current reality: fund raising has become a metrics game = creates stress
- At the same time, there are more fundraisers soliciting the same pool of potential donors
- Donors are becoming increasingly sophisticated
- Must be sharp and good at what we do to succeed

## **A Numbers Game**

Stress is the biggest enemy for making  
successful calls

The Birds

[http://www.youtube.com/watch?v=D15HPy  
4x73g](http://www.youtube.com/watch?v=D15HPy4x73g)

**"Cold" Hard Reality**

**Let's Get Started**

- Block time to make calls on your calendar
- Remove all distractions
- Be yourself!

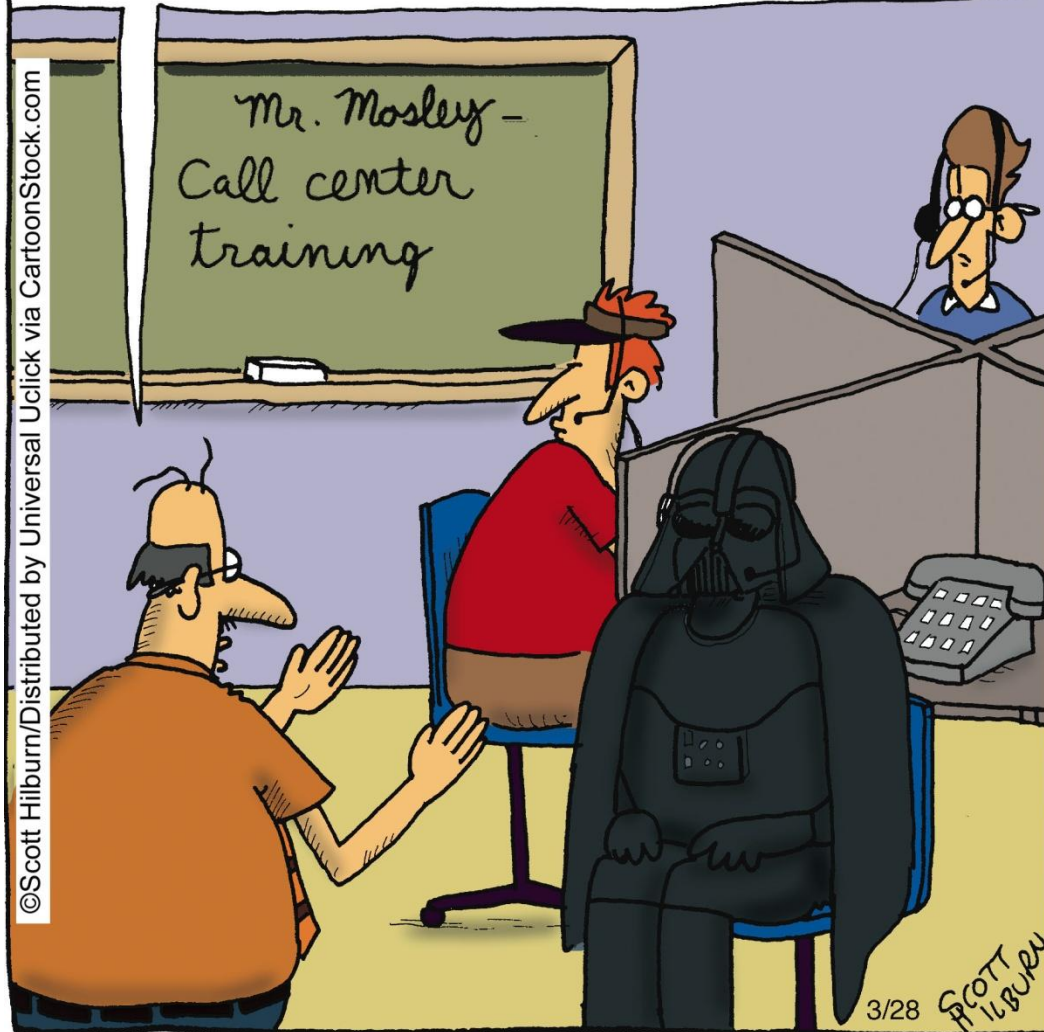
**Basics**



- Read the donor's contacts first
- Make sure s/he hasn't said no calls
- Note any relevant information that could help make the call easier ... "I see you attended our last event. What did you think?"

**Know Who You're Calling**

AND AFTER OUR PRACTICE SESSIONS, I CAN'T STRESS THIS ENOUGH - DO NOT BREATHE DIRECTLY INTO THE HEADSET. IT SCARES PEOPLE.



©Scott Hilburn/Distributed by Universal Uclick via CartoonStock.com

3/28 SCOTT HILBURN

- Know why you're calling, "Mary, you've been a long-time, loyal supporter..."
- Write a script – then memorize it
- Practice using a mirror, tape recorder or have a trusted colleague listen to your calls
- Take advantage of being new to your organization/major gifts fund raising

The Pallbearer

<http://www.youtube.com/watch?v=ef77ViM-f14>

**Practice**

- Take two minutes to write down a sample introductory phone call
- Now, turn to your neighbor and take turns sharing your calls
- Give your partner positive feedback
- Anyone want to share a great call by your partner?

## Practice Exercise One

- Listen carefully – no eye contact
- Know when to stop talking
- Close for the meeting
- Say thank you and get off the phone
- If appropriate, send a confirmation note

**Close for the Meeting**

- Write down your preferred way to close for a meeting
- Turn to a different neighbor and take two minutes to share each of your styles
- Spend two minutes giving each other positive feedback
- Anyone want to share?

## **Practice Exercise Two**

Solicitation visit calls: Donor should know why you're coming!

- "I'm hoping you'll consider ..."
- "I'm hoping to share with you a project about which you've expressed interest ..."
- "We're finally ready to start the program you've been suggesting we should offer ..."

**Solicitation Meetings**

- Try to get them to leave the door open,  
“I’m going to be in your area again ...”  
“Would it be alright if ...”
- Create a tickle in your database to follow up when they tell you to call back
- Send a hand-written note thanking them for their time

## Handling Refusals





**"Put me down as one of the cranky 20%."**

- Even, non-reactive tone
- Validate, don't argue
- Listen more than you speak
- Recap what you've heard them say
- Ask them how they would like to resolve their issue
- Follow up promptly and respectfully

**Nasty or Cranky Donors**

- Learn when to push and when to back off
- Ask permission ...  
    “Would it be alright if ...”
- Always be polite
- Humor helps

**Persistence**



“Is it just me, or do you screen all your calls?”

- Multiple screening devices
- Have a message ready
- Say when you'll try again
- Take notes and put them in contacts: do what you say you'll do
- Send a follow-up email if appropriate

## **Answering Machines and Voice Mail**

©Scott Hilburn/Distributed by Universal Uclick via CartoonStock.com

SCOTT  
HILBURN

SIR, MR. POT'S ON LINE 2.  
HE SAYS HE'S RETURNING  
YOUR PHONE CALL.

4/9

THE POT CALLS THE KETTLE BACK



# **Other Ways to Secure Visits**

- Prefer phoning first, unless there's a note on file indicating otherwise
- Which means, keep thorough notes in your database
- Refer to previous voice message
- Keep it short and polite
- Proofread before hitting the send button
- Have a specific action step/request

**Emails**



- Especially helpful if covering a wide geographic area
- Do what the letter says you will and when
- Time carefully: both the mailing and the suggested visit window
- Keep careful note of visits secured and other responses
- Send a confirmation letter

## **Introductory Letters**



"I'm sorry, he's not available. Can you call back when you're more important?"

- Depends on where you work:
  - Board members
  - Development committee
  - Fellow alums
  - Other program beneficiaries
- Go alone or invite a peer
- This is one time to name drop!

**Referrals**

- Premium Membership
- Using InMail
- Requesting introductions
- Side benefit: job offers

**LinkedIn**



PREMIUM



Search for people, jobs, companies, and more...



Advanced



Home

Profile

Connections

Jobs

Interests

Business Services

Upgrade



## Rebecca Rothery, CFRE

PREMIUM

Director of Major and Planned Giving, Baltimore Community Foundation

Baltimore, Maryland Area | Nonprofit Organization Management

Current The Baltimore Community Foundation

Previous Catholic Charities of Baltimore, Red Cross of Central Maryland, The Children's Guild

Education Notre Dame of Maryland University

Complete your profile

Edit

500+ connections

www.linkedin.com/pub/rebecca-rothey-cfre/8/345/b7a/

Contact Info

### Background



#### Summary

Philanthropic advisor to donors and their professional advisors. More than thirty years experience fund raising, fifteen in planned giving. Exceptional donor relationship-building skills through process of identification, cultivation, solicitation and stewardship. Designed and managed planned giving marketing programs, creating unique brands. Creative self-starter with a passion for the non-profit sector and for encouraging donors' philanthropy.

Specialties: gift planning, major gift solicitation, relationship building, marketing, communication, proposal writing, estate administration, public speaking, outreach, training

### People You May Know



Eleanor B. Smith 2-3

Director of Donor Relations and Operations...

Connect • 5



### One Question Site Survey

IT TAKES ONLY SECONDS TO ANSWER BELOW

Among the following airlines, which one do you prefer most?

SELECT ONE ANSWER

Delta

Are You a Female Director - Apply Now to the National Association of Professional Women. Register I

# Eleanor B. Smith

2nd

Director of Donor Relations and Operations at Notre Dame of Maryland University

Baltimore, Maryland | Higher Education

Previous Bunting Management Group, Eleanor B. Smith Photography, Inc., Carroll County Times Newspaper

Education Loyola University Maryland

Connect

Send Eleanor B. InMail



13 connections



[www.linkedin.com/pub/eleanor-b-smith/9a/876/a](http://www.linkedin.com/pub/eleanor-b-smith/9a/876/a)

## Background



Experience

### Director of Donor Relations and Operations

Notre Dame of Maryland University

May 2014 – Present (3 months)



### Director of Philanthropy And Financial Analyst

Bunting Management Group

May 2005 – May 2014 (9 years 1 month)

PROTECT YOURSELF ORGANIZATION WITH DIRECTORS AND OFFICERS



TRAVELERS

## People Also Viewed



**Tarah J.**  
Homemade ci



**Anne Naunt**  
at



**Beth Donnel**  
Special Events  
Way of Centra

Are You a Female Director - Apply Now to the National Association of Professional Women. Register Free

## Eleanor B.

Director of Donor Relations  
Baltimore, Maryland

Previous Education  
Bunting Man...  
Loyola Unive...

Connect

Send



### Background



Experience

### Director of Donor Relations and Operations

Notre Dame of Maryland University

May 2014 – Present (3 months)



Anne Naunton  
at

### Introduction Request



Rebecca Rothey, CFRE



Eleanor B. Smith

### Who should make the introduction?

Showing 5 shared connections between you and Eleanor B. Smith.

Sort by: Connection strength to Eleanor B. Smith



**Adam Donaldson**  
Member Services Director at  
Association of Baltimore Area  
Grantmakers

3 Shared Connections



**Cheryl Casciani**  
Director of Neighborhood  
Sustainability

3 Shared Connections



**Kathleen Elliott**  
Development Director at Central  
Scholarship

2 Shared Connections



**Rebecca Ruggles**  
Founder & Coordinator, Maryland  
Environmental Health Network

2 Shared Connections

- Know who's attending
- Find a relaxed opportunity to chat
- Suggest, but don't ask, for a meeting
- Send a hand-written follow-up note
- Call or email a week or two later

**Agency Events**



- Have a reason:
  - Deliver a gift
  - In the area
  - Request for information
- Keep it brief
- Make the primary purpose to say “thank you”
- “Perhaps we could meet the next time ...”

**Drop By**

- Inexpensive and increasingly easy to use, especially with tablets
- Create an account with a phone number
- Voice only or video
- Anyone had success using Skype?

**Skype**

# **Final Thoughts**

- We read our fears into silence
- Don't know what's going on in our donors' lives
- Ask open-ended questions

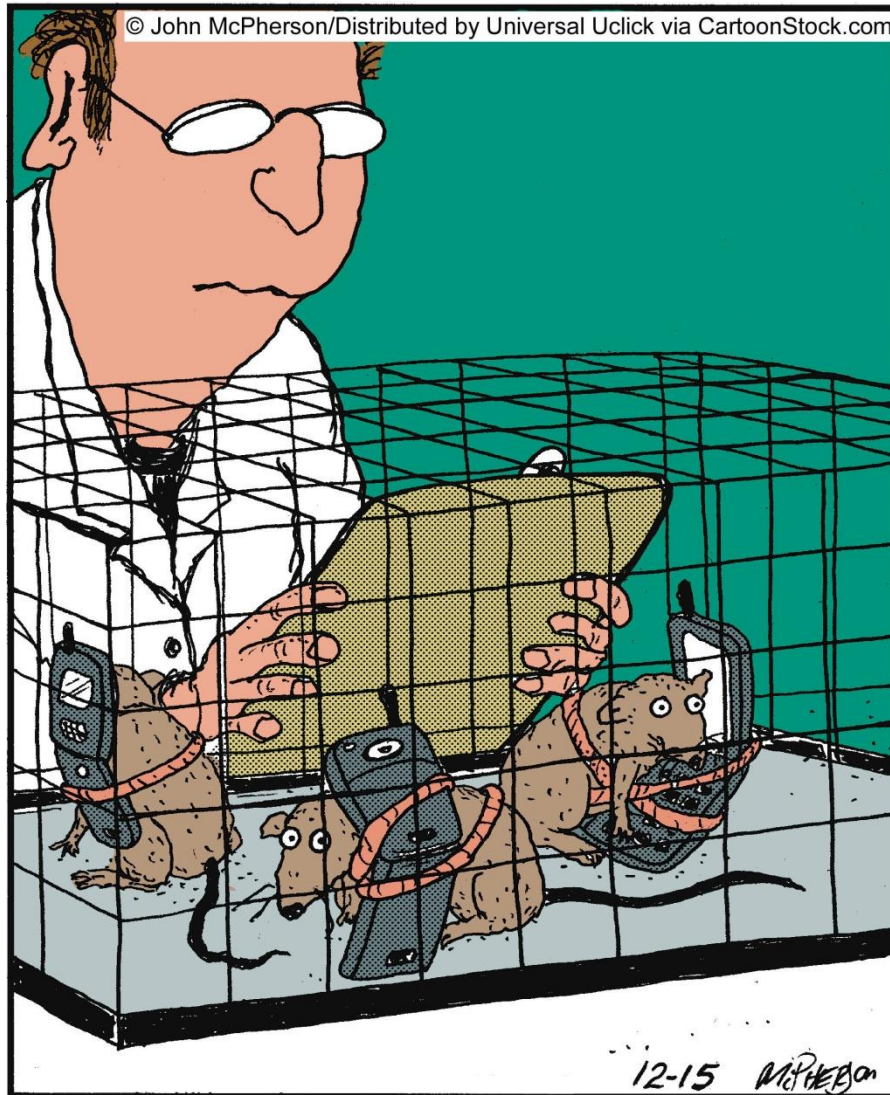
From Bridget Jones's Diary:

<http://www.youtube.com/watch?v=mrX4SwMyGdQ>

**Insecurity**

- Success creates its own challenges
- The more you're out, the less time there is to make calls
- Plan your calendar carefully
- Be proactive communicating with your supervisor if you get behind
- Allow time to decompress, if possible

## **Time Management**



**Dr. Dexter's research on long-term cell phone use  
was derailed by the enormous text  
messaging bills.**

- Allow yourself to have bad days
  - we all do
- If possible postpone your calls, your mood will come through
- Remember this too shall pass
- Greet the world with humor

**Bad Days**

- Enjoyment of your work comes through – smile into the phone
- This is serious business, but it doesn't mean you have to be
- Most folks we call are good people who want to make a difference

**Have fun**



- It's a numbers game
- At least five calls for every person reached/meeting secured
- Patience and persistence
- Only need one yes ...

The Pursuit of Happiness

<http://www.youtube.com/watch?v=xPBBnS4br9w>

**Most feared word in the English language?**

**Remember Why We  
Do This Work**

- Commitment to our organizations' missions
- The rewards of helping donors achieve their charitable objectives
- The thrill of success

**It's about the mission**

- Practice = 10,000 times
- Take notes: what went well, what didn't?
- Develop a personal style and learn to vary it as needed
- Enjoy your work!

**Practice Makes ...  
More Practice**

# Keep on calling!

Rebecca Rothey, CFRE  
Director of Major and Planned Giving  
Baltimore Community Foundation  
2 E. Read Street, Baltimore, MD  
21202  
rrothey@bcf.org  
410-332-4172 X132 | Fax: 410-837-  
4701  
[www.bcf.org](http://www.bcf.org)  
INVEST *in* Baltimore

## Thank you