How to Build Strong Relationships that Maximize Major Gifts

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Welcome!

I'm Beth Ann Locke, The Fundraiser Coach. You're about to learn some of the most impactful strategies for cultivating strong relationships with your donors.

As a fundraiser, you're often asked to fulfill a lot of different roles in your organization.

But the time you spend investing in relationships with your donors is never time wasted.

In fact, it's the single most likely contributor to receiving a gift that's far beyond your expectations.

When you understand how to build authentic relationships with the individuals within your donor pool — which is exactly what you'll learn in this guide — you can:

- Confidently call on their support when you're spearheading a new initiative because you know its goals are close to their heart
- Take pride in your ability to bring in significant amounts of funding "like magic" (that's how it will seem to everyone else)
- Experience the excitement of announcing that a donor will be contributing two-times, three-times or even ten-times what your team had dared to imagine

When you know how to create connection so that donors feel like partners (not just ATMs), they will surprise you with the depth of their passion for your work... and that's a wonderful feeling.

This free guide to maximizing major gifts will teach you:

- My #1 tip when it comes to creating lasting relationships in the major gift space
- The 3 types of Discovery Calls you should be making to your donors
- Key Elements of each type of call (including word-for-word language you can use)
- How to uncover your donors' deep motivators, and
- The step-by-step process I follow to make a great impression every time

But more importantly, if you embrace the practice of cultivating strong donor relationships, you'll experience the joy of helping supporters shape their legacies by generously contributing to the causes with meaningful support.

The #1 question I hear from my coaching clients, from people I meet at conferences, and people who call in to consult with me is this:

"How do I create and sustain lasting donor relationships in the major gift space?"

Actually, it usually sounds more like:

> *"Oh my gosh, I need more donors, I need to raise more money, I'm also really busy... and my boss says just raise the money right away."*

Have you asked that question before?

Typically, when people ask me that, what they really want to know is:

"How do I get the relationship with my donors where...

- *I can pick up the phone and run a giving opportunity by them, and they'll listen with interest?"*
- *I can send them an email with a request to meet and hear from them promptly, whether it's a yes or no?"*
- *When an emergency happens that relates to my nonprofit, they'll take my call, we have a discussion, and they may even make a meaningful pledge of support?"*

That's the kind of relationship fundraising many of us want to be in because that's how we get sustainable support.

So how do you get there?

My #1 Answer? Discovery Calls

Discovery Calls (a.k.a. conversations with donors) offer you the opportunity to:

- Learn the donor's reasons for supporting your nonprofit and to understand their interests and values. We know that connecting to values is vital to relationship building and can quickly move donors to even greater giving.
- Continue previous conversations you've had and explore the donor's current mindset and readiness to give.
- Check in on the donor to inspire or to update on the impact of their gift.

While these calls to donors may sometimes (unexpectedly) result in gifts being made, your primary goal is to strengthen the the relationship between donors and your nonprofit so that you have an opportunity to maximize their giving.

There are 3 types of Discovery Call I like to use:

1) The Thank You Call

On the Thank You Call, you're simply calling to thank them for their support. Early in the call, I make sure to get ahead of their worry that I will ask them for a gift right then. Because a lot of nonprofits are calling and asking for any gift rather than building relationships.

Key Elements of a Thank You Call:

1. Identify yourself and your nonprofit, and thank them for their gift.
2. Ask if they would like to hear more about how their gift is making the impact that you told them it was going to do when they donated.
3. Share the impact of their contribution. ← This is one of the easiest ways to build a stronger relationship with your existing donors.

Sample Conversation Starters:

> *"Hi Mr. Brown, I'm [your name] calling from [nonprofit] just to say thank you for your recent gift. You've been such a wonderfully faithful donor over the last 8 years. Do you have time to share why our work is so meaningful to you?"*

Or

> *"Good morning, Chris. I hear you've given generously several times this year. Thank you so much! Is now a good time to chat with you? I'd be honored to share how your gift is working to create change." ← Use whatever's most relevant to your mission impact here.*

Note: Discovery Calls are NOT calls where you ask the donor for donations!

2) The “It’s Been a Minute” Call

This is a call strategy you can use with donors who haven't heard from you for a while — whether that’s six months or even over a year.

It also works if they’ve dropped off as donors and you'd like to connect with them to test whether they're ready to get re-engaged.

Key Elements of the “It’s been a Minute” Call:

1. Identify yourself and your nonprofit, and thank for their past support.
2. Ask permission to share your news and update them about the current work of your nonprofit. Using permission-based language puts the donor in the driver's seat. Remember, you aren't asking for a gift.
3. Comment on the importance of their past support — which has brought your nonprofit to where it is now.
4. Offer the donor a sense of where the nonprofit is moving — inspire them with the vision of what is on the near-horizon.

Sample Conversation Starters:

“Hi Ms. Li, It's [your name] from [nonprofit] calling to say thank you. I'm getting in touch with donors like you who have been such wonderful supporters in the past. We've missed you since [last contact]. May I ask how you’ve been?" [Pause, listen, conversation].

"May I share with you how [nonprofit] has grown since your last gift? [Pause, listen, share.] Your generosity has allowed [nonprofit] to have an amazing impact [note past to now]. ← However you're speaking about this.

[Listen for interest, enjoy conversation.] "Thank you for chatting with me. I look forward to connecting again soon.”

3) The Intro Follow-Up

Have you ever had a board member tell you they have a great prospect that you should be in touch with, who has the ability to give a sizable gift... but while they're happy to share with you the name and email, the board member just doesn't want to get further involved?

This is a common problem that's best solved by having set practices in place and communicating those practices to the members of your board.

I tell board members and other ambassadors I'm working with: "It's important that you make a heartfelt introduction with the prospective donor and me so that there's a real connection." I call this the "transfer of trust". (read more on my blog).

It's also crucial for the board member to mention in the email why and how they are involved with your nonprofit, about the impact your nonprofit has in the world, and why the mission is important.

Once you've received that introductory email, you can take it from there.

Here's an idea of what you can include in your email reply to them both:

"Thank you so much for the introduction, [board member].

[Prospect], [board member] has spoken highly about you and mentioned that you're interested in hearing about the impact [nonprofit] is making in our community. Might we find a time for a coffee to chat / might you be able to shoehorn a meeting into your busy schedule / find time for a 20 minute call. ← Base this on your impression of their schedule – be flexible!

I have time on Tuesday and Thursday next week, whether in person, on the phone, or by Zoom, whichever is best for you. As [board member] has likely mentioned, [nonprofit] is accomplishing [mission impact] and I enjoy sharing about our work. I look forward to hearing from you soon."

Key elements of the response email:

- Thank the board member for the introduction.
- Request a short meeting (less than 30 minutes) so that the call doesn't feel like such a big ask — it's better if they ask for more time because they want to know more.
- Acknowledge the prospect may have a busy schedule.
- Offer different platforms, since you don't yet know what they prefer.
- Mention nonprofit impact in the community/ region/ around the globe.

These Introductory Discovery Calls are often very fruitful, especially when you use deep listening skills.

You can read my blog for more about how storylistening and storyweaving can help build incredible connections.

These "calls" will take place in 1 of 3 formats. You may:

- Call on prospects or donors with in-person visits,
- Call on prospects or donors by picking up the phone, or
- Call on prospects or donors over Zoom, Teams, Meet, etc.

Remember, use the platform that's most comfortable for the donor.

But here's the thing:

Conversations reveal values!

And people will invest in causes that align with their values and their interests.

Before I go any further... I can hear you saying...

I hate asking for money.

This sounds awkward.

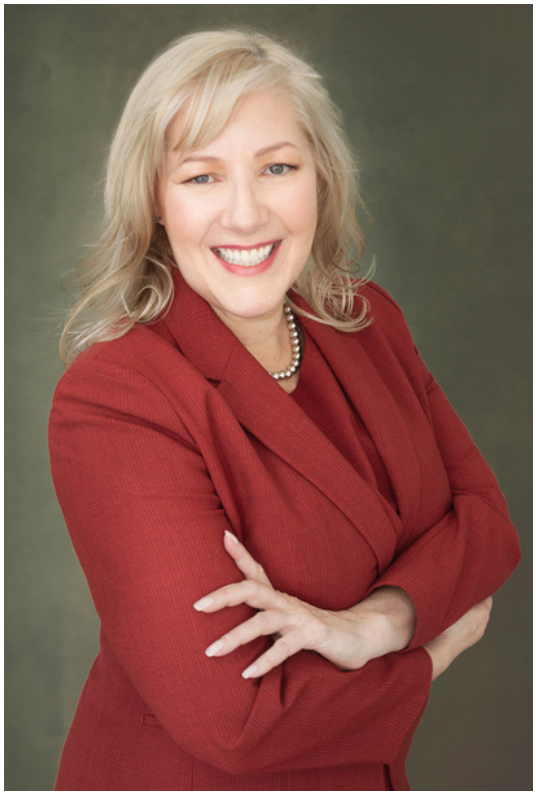
We're all tired of Zoom!

I have so many priorities to juggle, where will I fit this in?

I'm doing the job of three people right now!

I dislike it when people call ME, so ugh.

I can anticipate these comments because I've heard them all.



Have we met properly yet? I'm Beth Ann Locke, The Fundraiser Coach.

I teach a creative, connection-based approach to working with major donors. If you're a career fundraiser who wants to learn sustainable strategies to raise more money in less time...

You're in the right place.

I've spent 30 years cultivating gifts from major donors and crafting strategies for nonprofits.

Now, I'm helping fundraisers and nonprofits connect with philanthropists of every level, but especially those ready to make a major gift.

Your success is my ambition — let's achieve it together!

I've helped nonprofits all over the world to refine and diversify their funding strategies, including:

- Yesh Tikva
- Developing World Connections
- Lorain Scholars Foundation
- Gail Perry Group
- Preston High School, The Bronx
- Laboratory to Combat Human Trafficking
- Children's Hope Alliance
- The Aga Khan University
- BC Wildlife Federation
- Parkinson Society of B.C.
- Washington STEM

Here's what clients say after working with me:

"I chose to work with Beth Ann because I was impressed with her wealth of knowledge and easygoing style. I wanted a judgment-free coach.

In the early months of our partnership, she was an excellent sounding board and helped me find solutions to many challenges. As time went on, Beth Ann was a wonderful resource on technical questions and helped me set more realistic goals.

I would highly recommend Beth Ann's services to fundraisers and executives alike. She has the knowledge and skills to help you tackle any technical challenge. More importantly, she has a next-level understanding of people and will support your growth in this critical soft skill."

Andrea Brown, VP for Development
Institute for Community Living

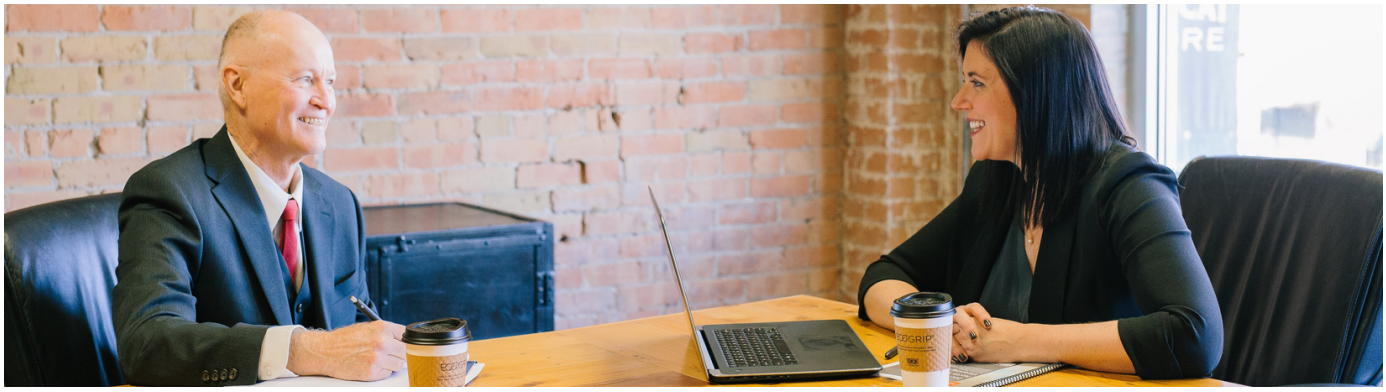
Interested in learning more about how I can support you or your nonprofit?
Book a connection call today.

During a Discovery Call, your goal is to learn more about your donor or prospect and try to understand what it is about your mission that's most aligned with their values or that has the greatest interest for them.

"What kind of questions may I ask to prompt these conversations?"

Here are 10 tried-and-true questions for digging below the surface. Questions 7-10 are for donors only. Consider printing this page when you make one of these calls:

1. "How did your family do charity when you were growing up?" ← My very favorite of all time. This question leaves open that some families gave to charity and some received charity. In your conversations, it's important to disregard any preconceived notions you may have about this person and whether or not they've had an easy life.
2. "What did you want to be when you were young?"
3. "What's the most important thing our community / the world needs right now?"
4. "When you and your family sit down to consider your giving for the year, how do you choose — and do you feel comfortable sharing that with me?"
5. "When you think about the work of our charity and the impacts, which ones make your heart sing?"
6. "Do you mind telling me about your top 5 charities? Will you share how they become favorites?" ← Don't assume yours will be among them and don't be disappointed; either way, you'll learn about what they love.
7. "Why did you first give to us?"
8. "What do you tell others about us?"
9. "Would now be a good time to discuss your gift/ gift to our campaign?"
10. "When you consider your life, how do you wish to be remembered?"



“Ok... So how do I actually do this?"

Here’s my step-by-step process for rocking your calls:

1. **First, start with one segment of donors.**
Looking at a giant list will just fry your brain. Start with a group of 10 or 20, max, knowing you're probably only going to call five a day, and some of those aren't going to pick up the phone. (Always leave a message!)

   Once you have created my segment, pull the most helpful information.
Such as: the names of the donor(s), their contact information and city, the first gift date and amount, the most recent gift date and amount, and the largest gift date and amount. Note how they typically give; and any other key facts, e.g. board service or significant volunteer moments. One easy way is to print out the donor profile and use that for taking notes.

2. **Next, grab a pen and paper and get ready!**
By phone: I smile before I speak - you can hear it through the phone.
In-person: I dress professionally (however that is for your work), arrive early, and keep the meeting to 30 minutes unless they wish to continue.
By Zoom: When meeting with a donor or prospect on Zoom:
   a. I make sure that the camera is at my eye line or a bit higher, so I'm looking slightly up rather than looking down at them.
   b. I make sure my lighting is comfortable for me and it’s not difficult for them to see me (I'm not in silhouette!), and
   c. I don't stress too much about my background, focus on the donor.

3. **Another Pro Tip: have an image of a mission moment nearby.**

   This serves as a reminder of why you're doing this noble work!

   You're not calling to ask for money, You're calling to let them know how we can change the world together.

4. After the call, write notes to summarize everything discussed.
Take notes during a phone call, fewer if on Zoom, and if in person wait until the meeting is finished (and capture in a voice memo).

Summarize the key points in a note, with any next steps. Make a calendar appointment to connect in a few months. Consider writing a thank you email set to send at the end of the day.

Next, because connecting with values are fundamental to moving toward an ask, my tip is to add a note called Values and Interests. I place what I learned about their values, interests, and passions for easy reference.

As we build the connections between the donor and our nonprofit impact, colleagues will be able to easily find the revealed interests and values that the donor finds meaningful.

There you have it! The 3 types of Discovery Call that will help you strengthen your donor relationships so that you can maximize major gifts.

Your next steps...

For these strategies to have a visible impact on your revenue goals, you WILL have to actually put them into action.

So while you're sitting here with these tasks top of mind, why not take a minute to schedule the following into your calendar:

1. Start with a list of 10 donors you either need to thank, haven't heard from in awhile, or need to get to know.
2. Time-block one hour, mid-morning, to make Thank You or It's Been a Minute calls.
3. If you're reaching out to a new prospect, I suggest you send an email to find out what times work best for them. If they don't respond in 7 - 10 days, make the call.
4. On the day of your scheduled calls, go back to the previous pages and refer to my step-by-step process for rocking your calls.
5. Share this guide with any colleagues or peers you think may benefit from implementing the approaches you've learned in this guide.

If, after ticking off the tasks above, you're curious about getting my insight into your nonprofit's unique fundraising needs, I'd love to speak with you for our own complimentary Connection Call:

Book a Call with Beth Ann now

On this call with me, I'll ask you to tell me a bit more about the challenges you're up against when it comes to maximizing major gifts, and offer a couple of ideas on how you might improve your existing efforts.

If you're interested in further support, I'll share more about how we can work together. I offer:

1:1 Coaching for Fundraisers on the Rise

What if you could become your organization's biggest asset — and build the fundraising skill-set that will secure your career in this field?

I teach time-efficient methods of building relationships with donors. So that you can create the connections that bring major donors to the table.

Work with me 1:1 to learn from my 30 years' experience meeting and surpassing my organizations' funding goals.

Your first step?

Book a free Connection Call today

Strategic Consulting for Nonprofits

Your next level of funding is on the other side of something different.

Luckily for you, different is what I do.

For the past 30+ years, I've worked with some of the biggest nonprofits in North America to diversify their fundraising revenues and help them raise more money through my creative, connection-based approach.

Now, I can help you and your team create a plan that leads to sustainable, long-term success

Let's chat about what comes next

Here's what clients say after experiencing my deep support:

Beth Ann was instrumental in helping us secure our largest donation to date

There are many aspects of working with Beth Ann that were a tremendous help to me. She was patient with my limited knowledge and guided me in so many ways. Beth Ann helped me organize my thoughts and guided me on how to structure my asks. She even mentored me right before a call to a major donor.

Beth Ann was instrumental in helping us secure our largest donation to date of $100,000, in addition to some smaller ones ranging in $20,000-$40,000 — previously our largest donors were those who donated between $250-$1,000.

If you're seeking the guidance of an expert who will also provide a personal, hands-on approach and someone who is sincerely genuine, then Beth Ann is the person for you.

Cristina Fragale, Senior Director of Recruitment and Development
Preston High School, The Bronx

Thanks to Beth Ann's support, we exceeded our annual targets within six months of hiring our new fundraiser!

In the course of our work together, Beth Ann was instrumental in helping us create and fill our first fundraising position. She helped us identify where the opportunities were for raising funds and what type of candidate we should look for to help meet our targets.

Thanks to her support, we exceeded our annual targets within six months of hiring our new fundraiser!

If you're looking for expert support to help you raise more money, Beth Ann will meet you where you're at, and be committed to helping you get to where you want to be.

Joshua Molsberry, Executive Director,
Developing World Connections

THE FUNDRAISER COACH

Ready? Let's talk.