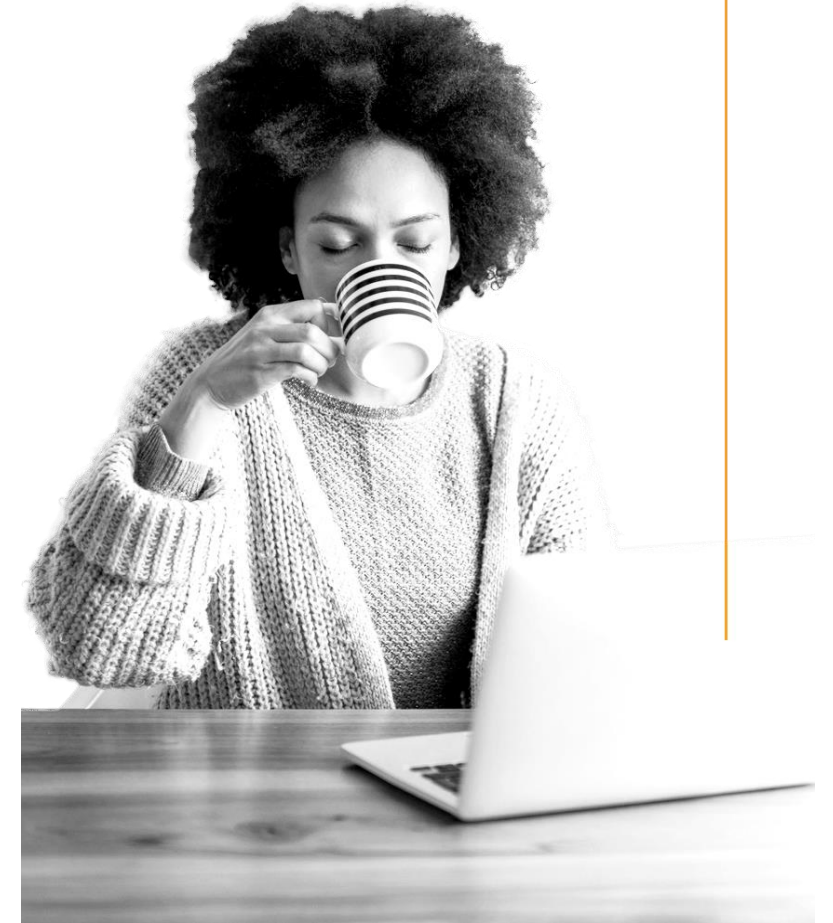


# Welcome

We'll be getting started momentarily.

In the meantime, please introduce yourself in the chat and let us know where you're joining from!

Get comfortable  
and ready to learn!



**fundraising  
academy**  
CAUSE SELLING EDUCATION

**Candid.**



***8 Steps for Cultivating Relationships  
with Individual Donors***

**Yes, we are recording today's presentation.**

You will receive a link to the recording via email in the next 48 hours.



# Presenters



**Dave Holmes**

Educational Programming Manager

he/him/his



**Ivonne Simms**

Educational Programming Manager

she/her/hers

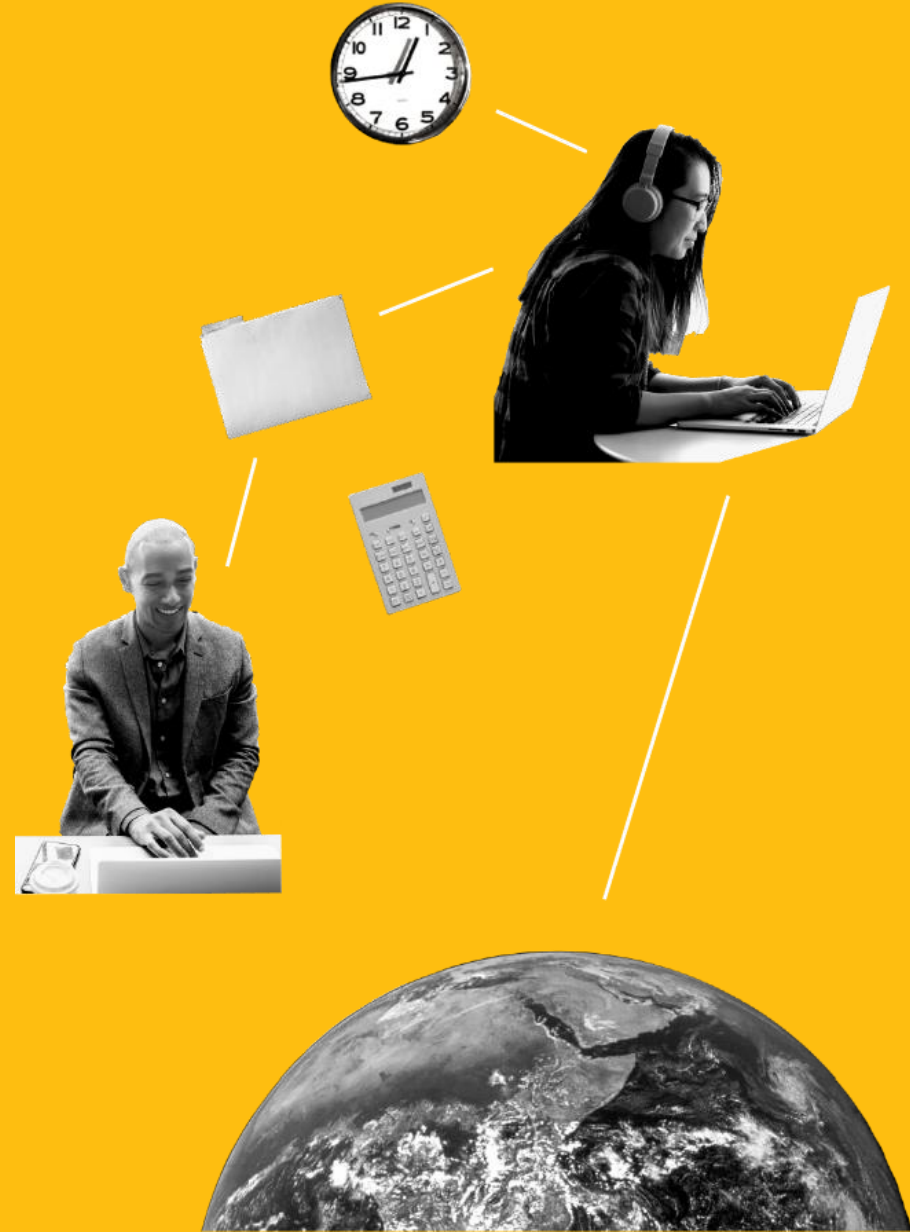
This training is brought to you by...



**Candid.**

# Candid.

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 gets you the information you need to do good.



**Thank you!**

Thanks to Border Philanthropy Partnership!

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CAUSE SELLING EDUCATION

**Candid.**



***8 Steps for Cultivating Relationships  
with Individual Donors***



# 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**



# Agenda

Welcome

Introduction to Cause Selling and the 8 Steps

Overview of steps 1-4 with case study

**Break**

Overview of steps 5-8 and guided activity

Wrap up and next steps

# Answer in chat

What does the word philanthropy mean to you?



# 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

# WE ALL SELL.

Every single day.

In any position and any career.

From parents to scientists and everyone in between.



# **Poll:** **Which of the following characteristics best describes “*Selling*”?**



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**.

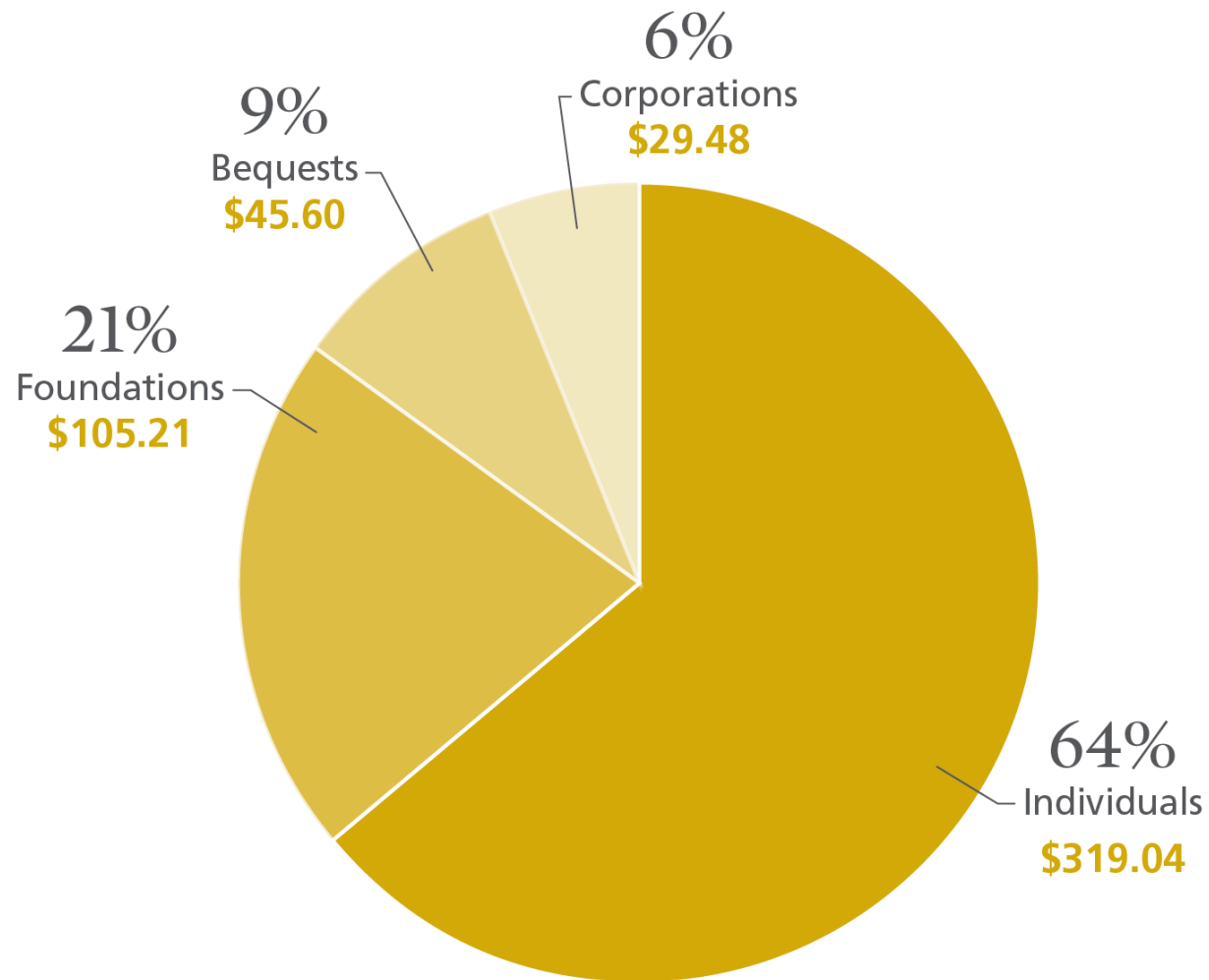
# QUALITIES OF TOP PERFORMING FUNDRAISERS

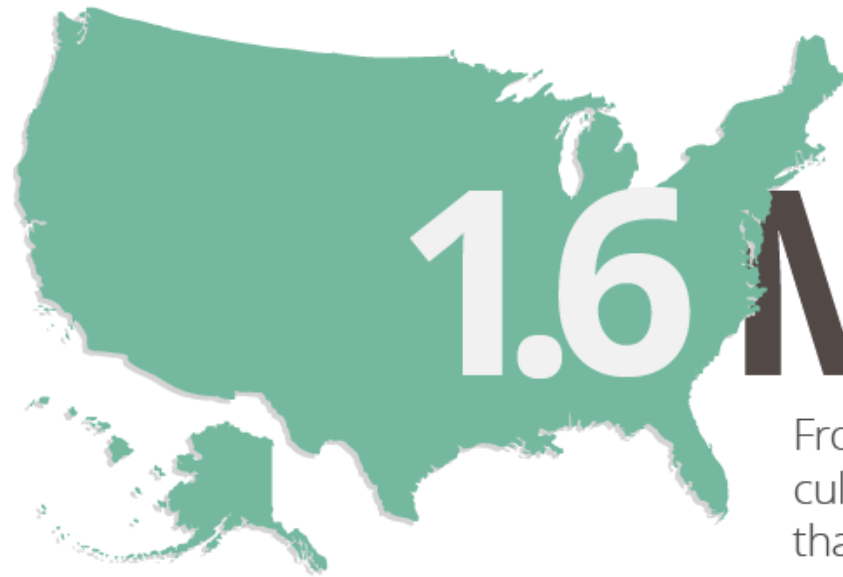
- **Exchange** information (rather than “hard sell”)
- Know **WHEN** to close
- **Advocate** for donors
- Provide added **value** to their donors
- **Trusted** within their own organization
- Engage in positive, **relationship-building** behaviors internally and externally



# 2022 contributions: \$499.33 billion by source of contributions

(in billions for dollars – all figures are rounded)





# 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%

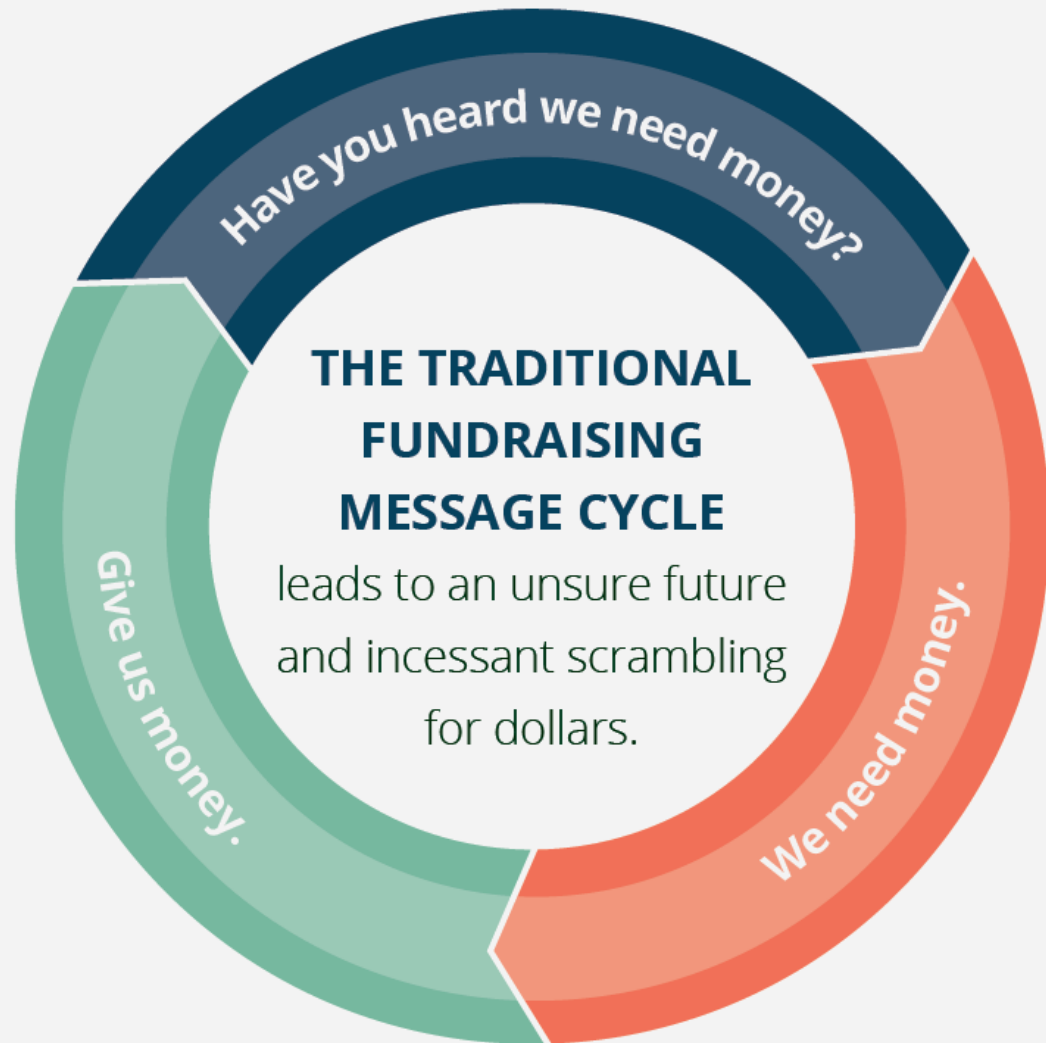
of the workforce

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.

Focus on the  
relationship...

not just the money

# 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?



# Discuss

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?

## Personal

- Friends
- Family
- Mentors

## Colleagues

- Co-workers
- Acquaintances
- Associates

Who do you need to cultivate this relationship with?

## 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](https://www.guidestar.org)

[dsgiving.com](https://www.dsgiving.com)

[fec.gov](https://www.fec.gov)  
(political contributions)

[marquiswho.com](https://www.marquiswho.com)  
(free trial)

[zillow.com](https://www.zillow.com)  
(real estate)

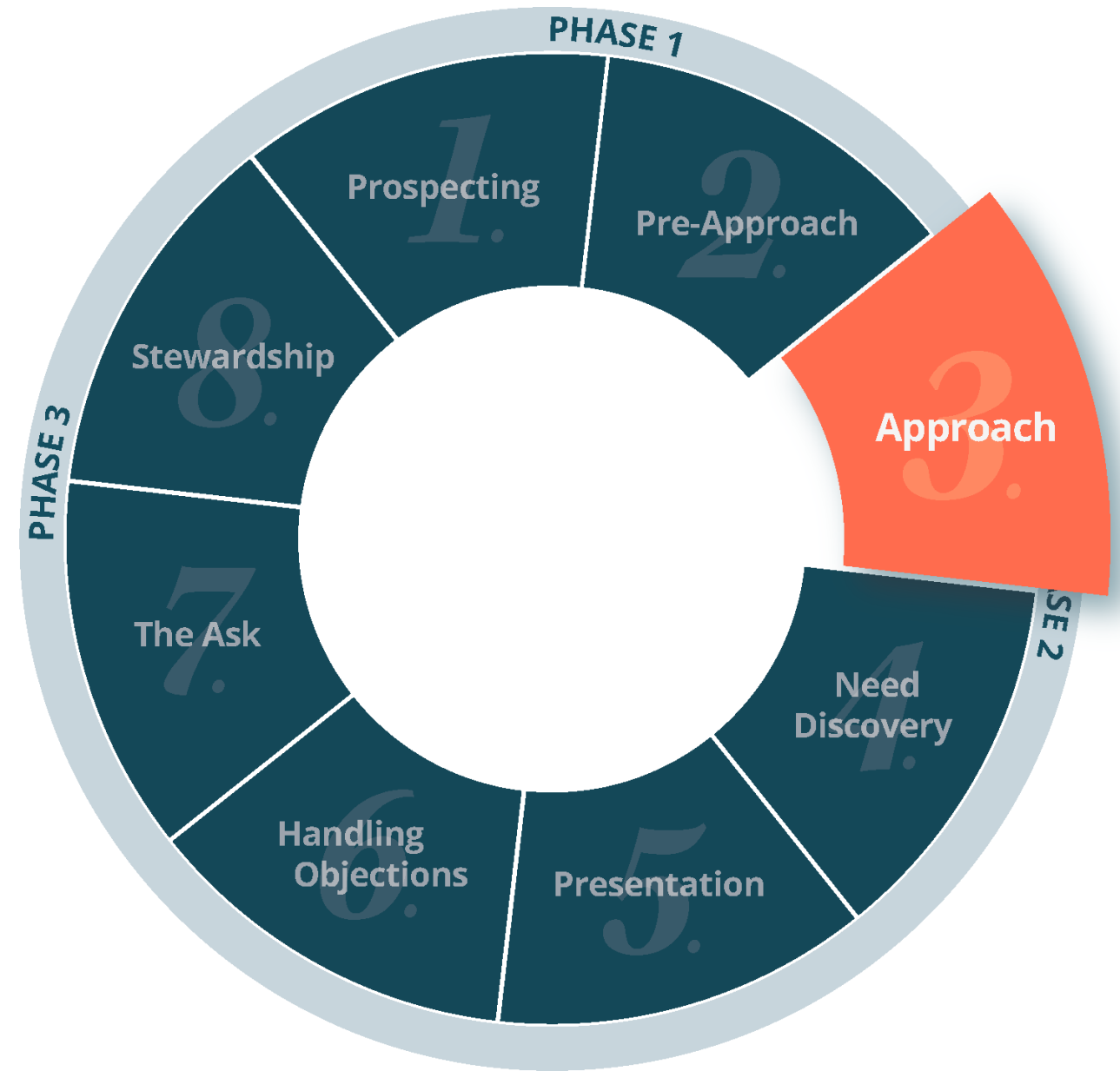
[zoominfo.com](https://www.zoominfo.com)

LinkedIn

[esri.com/data/tapestry/zip-lookup](https://www.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.**

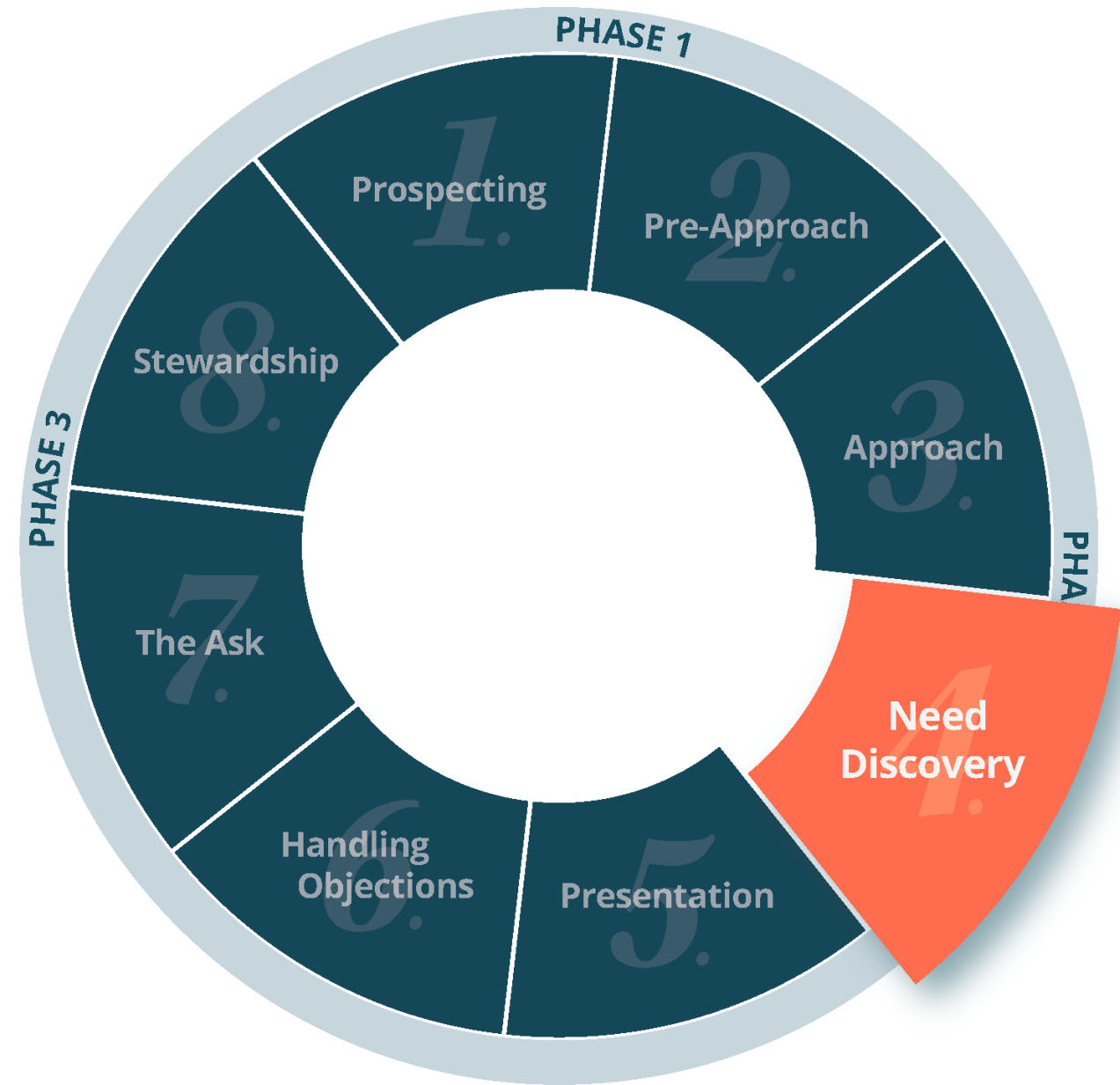
**Ultimately, your donor decides, given your impact this year, now is the right time.**

***What's next? What do you do?***

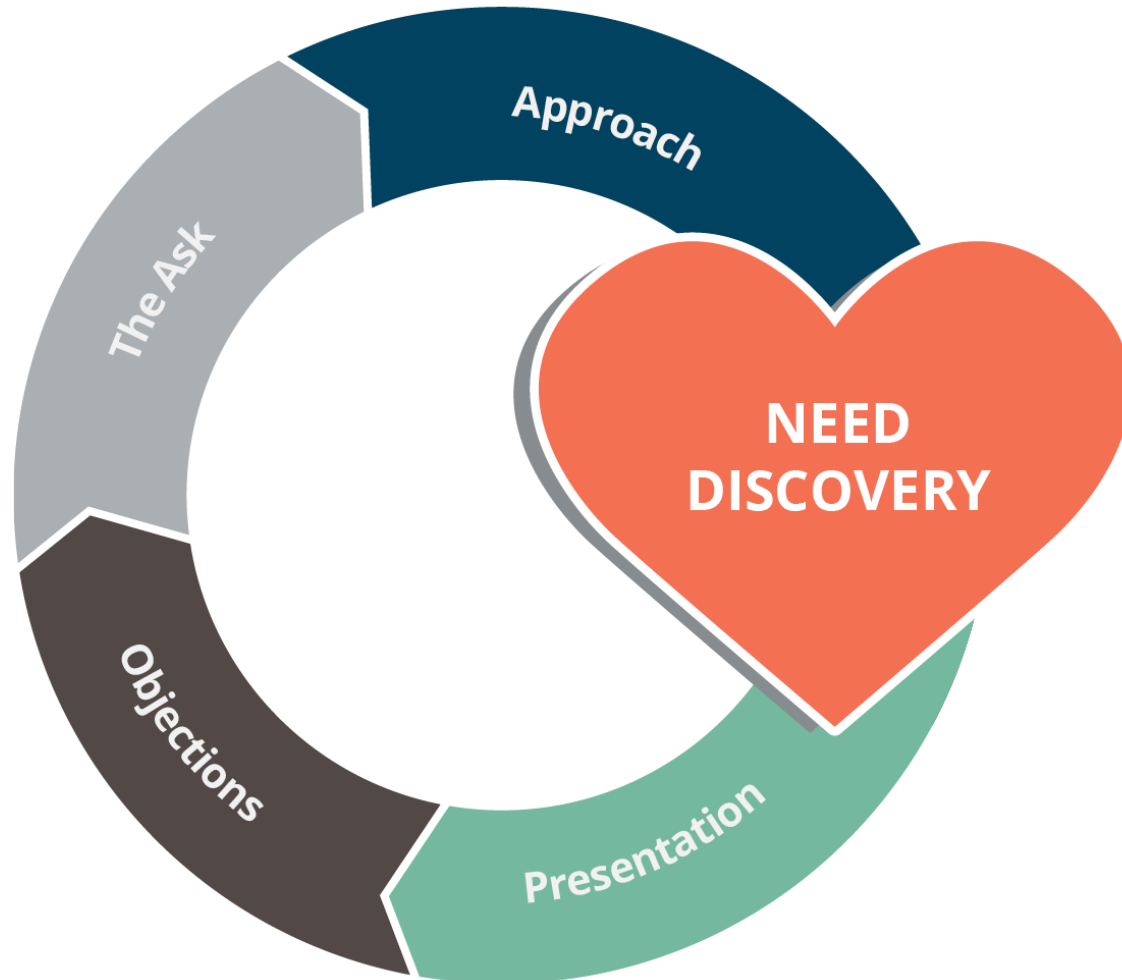
# 4 – NEED DISCOVERY

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

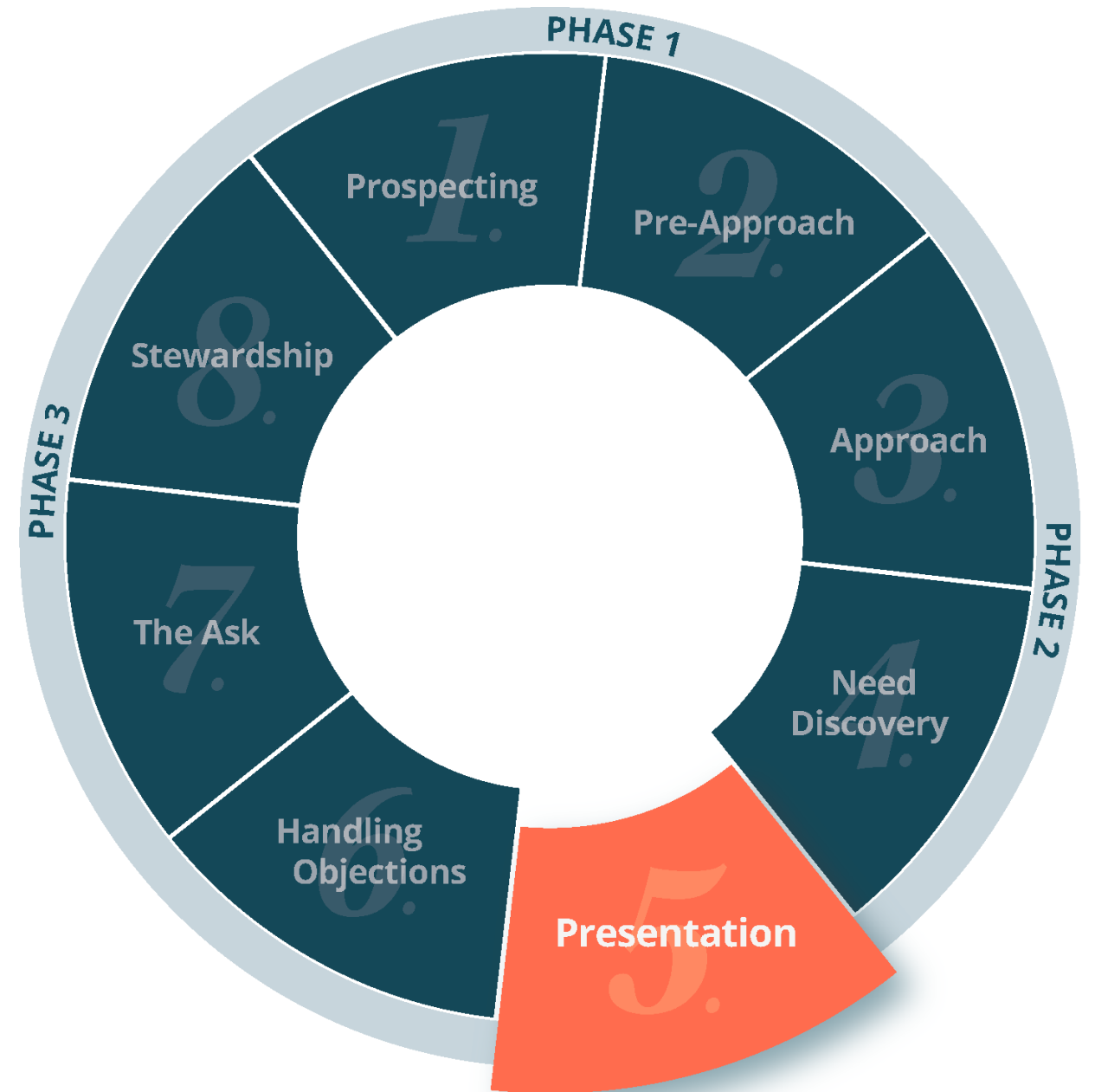
- Know when to use **open-ended** versus **close-ended** questions
- Use the **double-check**
- Use **nonverbal** gestures
- Don't be afraid of **silence**
- **Keep the prospect talking**



# BREAK

# 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

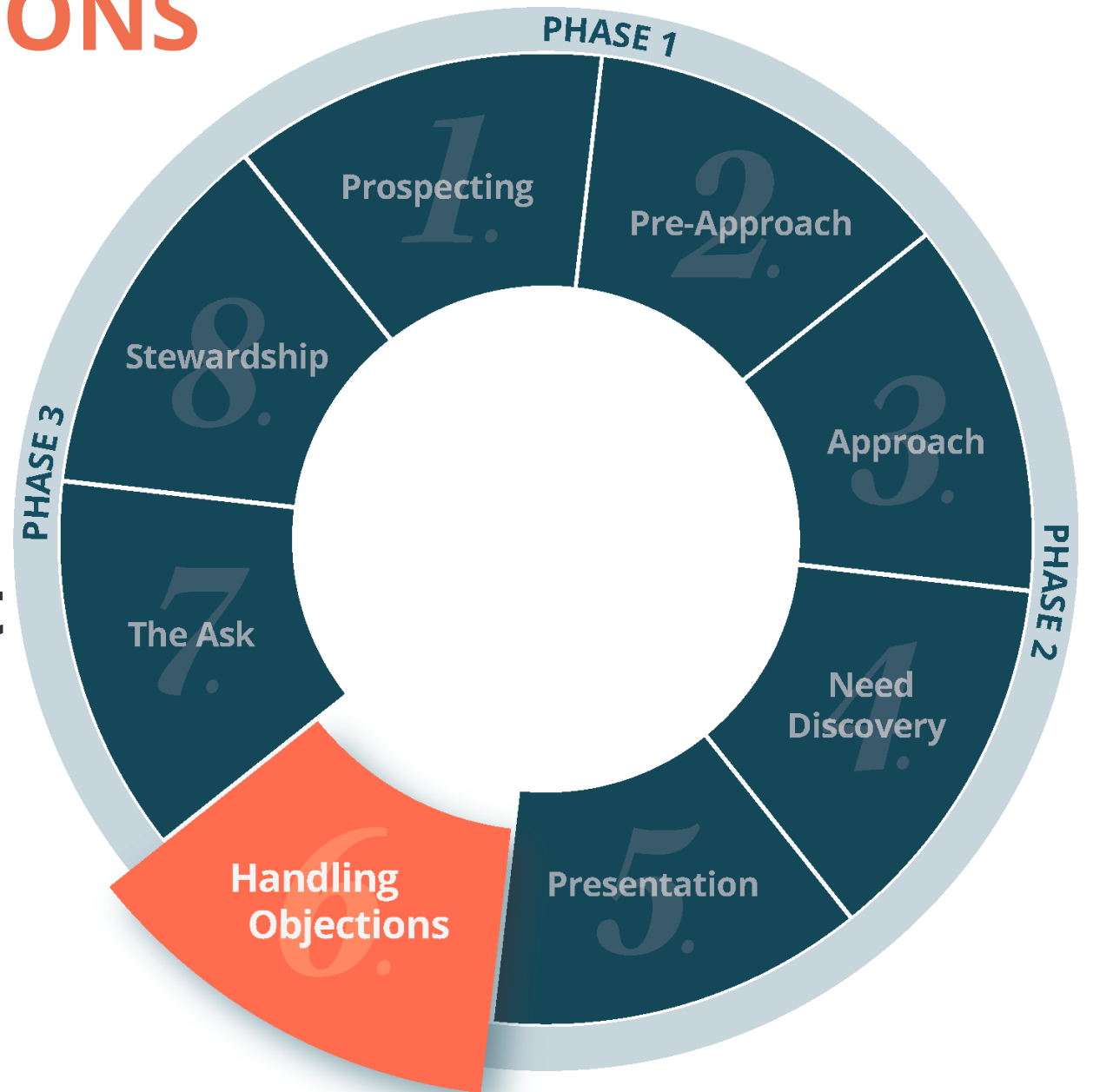
If you can't sell with enthusiasm, the absence of it will be infectious.

# 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**

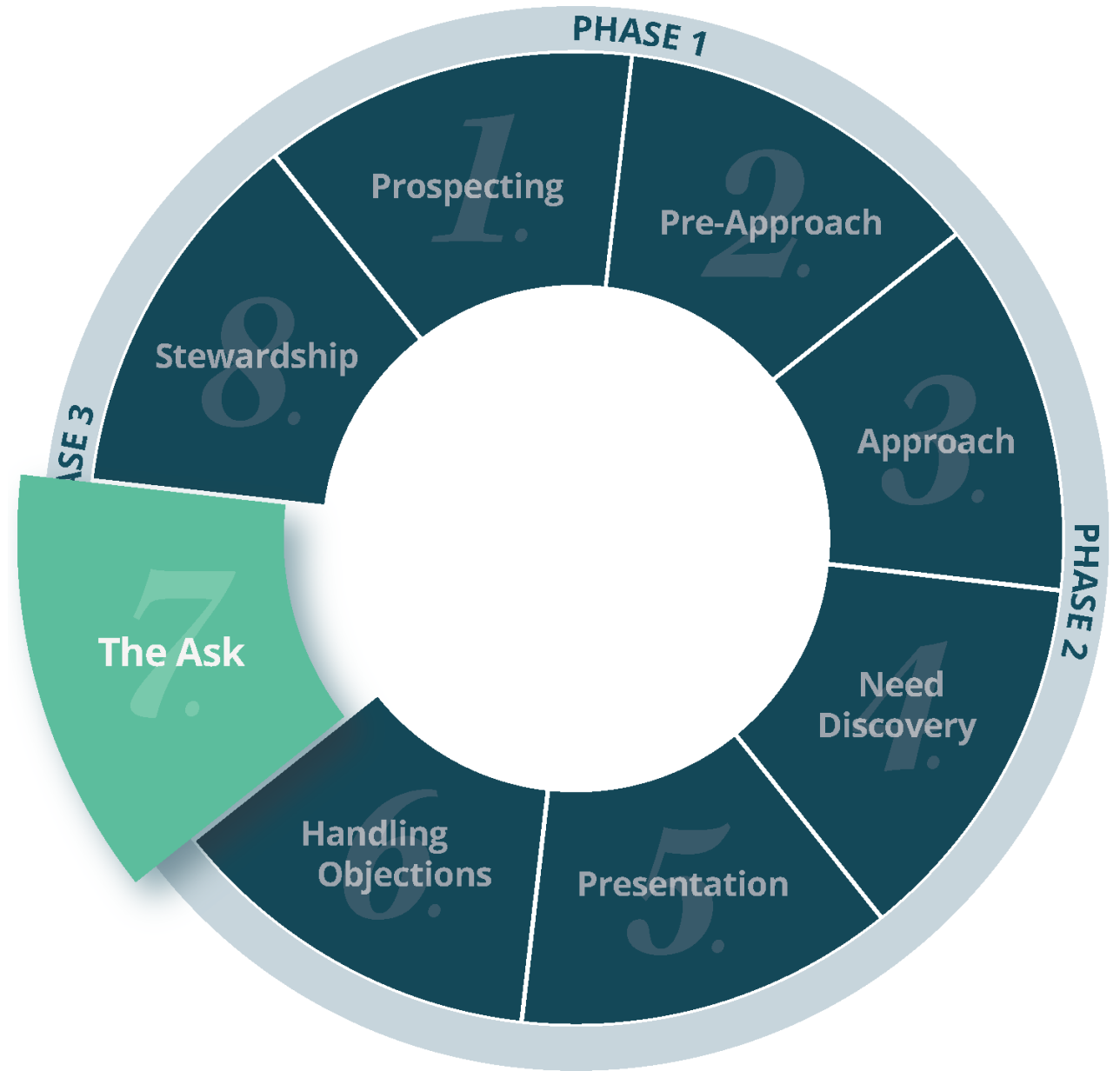


# Tips – Dealing with Rejection

1. *You are not alone*
2. *Forgive yourself*
3. *Refuse to give up*
4. *Remember you are important*
5. *Expect the worst, hope for the best*
6. *Broaden your definition of success*
7. *Commit to attracting more donors than you need.*

# 7 – CLOSING

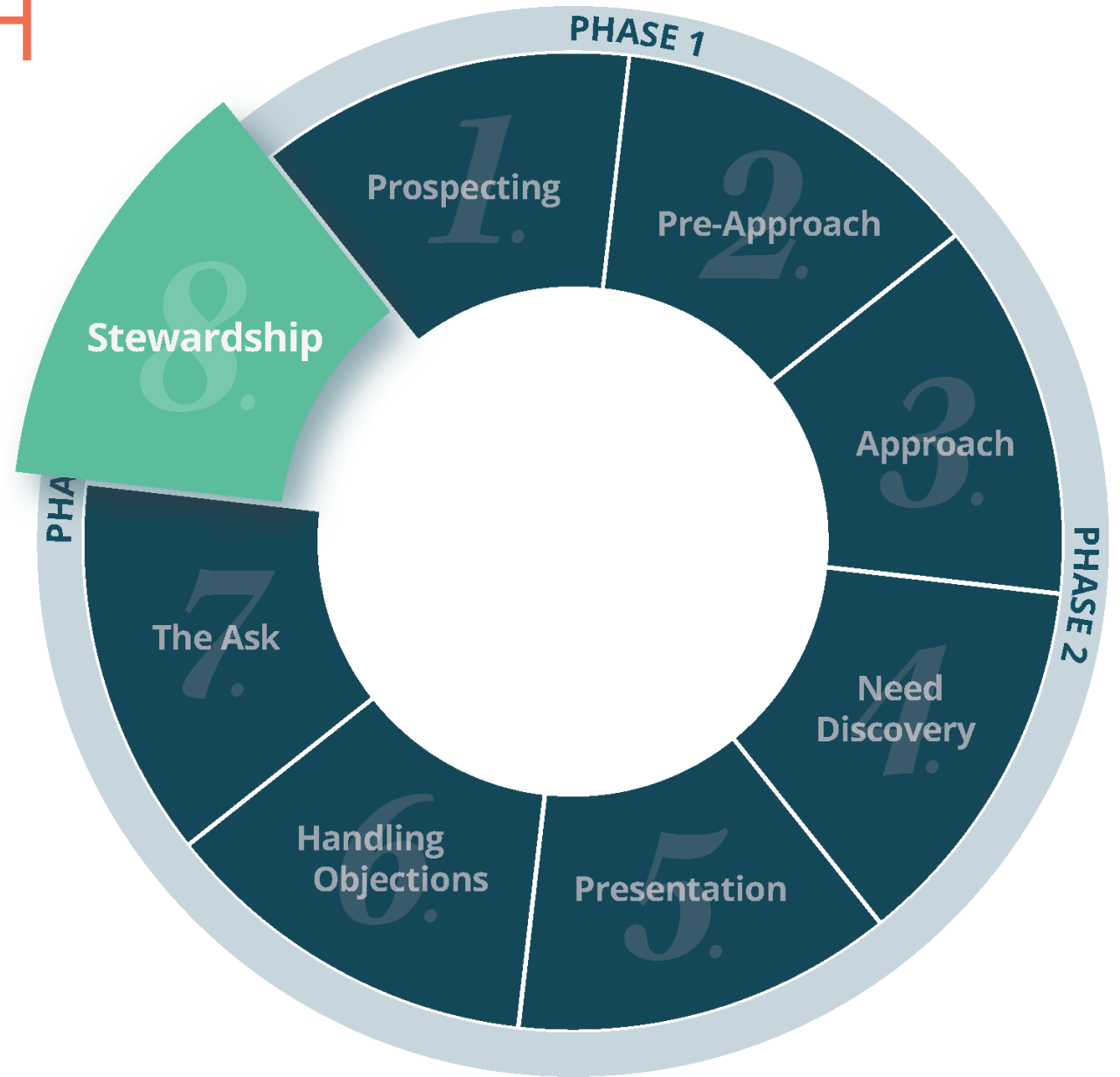
Make the ASK.



# 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

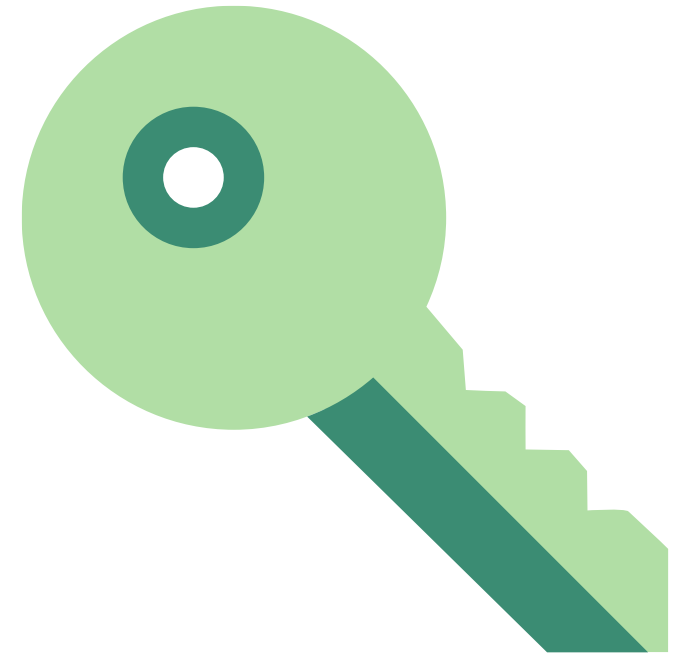
Think Like a **Donor**

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

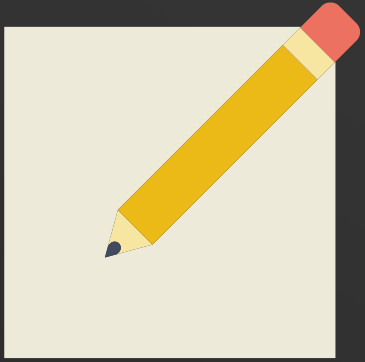
- Treat donors like long-term partners
- Link your cause to your donors' passions
- Provide solutions
- Have regular contact
- Be open and honest
- Say "we"
- Be an enthusiastic ally

## 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?

# How did we do?

Your feedback is important to us! Please take a moment to fill out our course survey:

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# Thank you.

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