

39 Steps

(with apologies to Alfred Hitchcock who gave a 1950s movie that title)

by

Katharine DeShaw, James Toscano, and Becky Glass

1. Schedule an interview/appointment.
2. Get interview scheduled by phone, but don't have it turned into the solicitation.
3. Prepare for the interview: know donor history, interests
4. Think out in advance other ways to involve prospect.
5. Decide in advance on a gift amount with a peer rating group.
6. Don't be afraid to ask for a large gift, perhaps with a multiyear pay-out.
7. Take a knowledgeable second person with you, ideally a peer. Together rehearse the interview.
8. At the interview, eliminate barriers, keep it eyeball to eyeball.
9. Use materials; bring something to leave behind.
10. Get the prospect involved through shared values.
11. Show optimism, warmth. Talk about successes of the organization and the beneficial outcomes of your work.
12. Let the prospect know they are needed for continuing success.
13. Ask them for help, advice.
14. Get them to talk about their experiences with the organization or the values it represents.
15. Compliment donors on past advice, gifts, thank them for past service, gifts.
16. Fact-finding to verify research:
 - "How do you feel about...?"
 - "What do you think...?"
17. Listen *carefully* to the answers.
18. Reassure prospect that the organization will do what it promises to do, give examples of previous accountability.
19. Use examples, anecdotes, statistics, surveys about organization's needs against the backdrop of its successes.
20. Treat prospect's objections as questions.
21. Be in loose control of the interview.
22. Ask for the gift—and ask for a specific amount.
23. Then pause...(silence is golden)...if yes...big "Thank you!"
24. Show direct benefit of gift to society, to prospect's values.
25. Show how tax laws help prospect give large gifts.
26. Break down gifts by year, month, day.
27. Close the interview—don't overstay.
28. If you get "no" for an answer—suggest prospect take more time and set up follow-up appointment.
29. Use more than one meeting if you are going for a very large gift.
30. Invite prospect on a site visit...see mission in action.
31. Follow up with 24-hour turnaround personal thank you letter.
32. Have Board acknowledge gifts with thank you notes.
33. Ask donor to suggest others who might give. Ask donor if they would be willing to call on others for the organization.
34. Upon return write a "call report."
35. Keep donors involved. Communicate often.
36. Ask for other things besides money: advice, ideas, time.
37. Invite donors to non-fundraising events. Appropriately reward them with symbolic exchanges.
38. Send progress reports, milestone/achievement reports, annual reports.
39. Repeat.