

RELATIONSHIP MANAGEMENT: GETTING RESPONSES, GETTING ON THE ROAD, GETTING IN THE DOOR, & GETTING GIFTS

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Topics Covered

- General Principles
- **First, Who To Ask?**
- Introductory Letters/Emails
- What To Do When You're Not Getting a Response
- Setting and Achieving Meeting Goals
- Remote Relationship Management
- Leadership Gift Asks and Moves Management
- Negotiating Unhappy Donors and Surprises
- User-Friendly Travel
- Effective Thank You Letters and Other Follow-Up

General Principles



“There is only one way under high heaven to get anyone to do anything, and that is to make them want to do it.”

“The rare individual who honestly satisfies heart hunger will hold people in the palm of his hand.”

--Dale Carnegie

General Principles

- Create a **robust sense of purpose**
- All carrots, no sticks
- Be the best version of yourself
 - ▣ Be honest, you're there to talk \$\$
 - ▣ [TED Talk: Paul Zak](#)
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First, Who to ask?

- Finding the best prospects
- Discovery Visits
- Volunteer cultivation/stewardship
- Not stepping on others' toes
- An OCD Ranking System

Introductory Letters and Emails

- Above all, WRITE WITH PRECISION.
- Roman & Rafaelson, *Writing That Works*
- Personalize
 - ▣ Option #1: Letter with Handwriting
 - ▣ Option #2: Email
 - ▣ Option #4,673: Cold Call
- Subject: Headlines, not Labels
- Dive Right In
- Clear over Cute
 - ▣ ...But not a form letter
- Obvious structure
- Plan a follow-up

What To Do When They Don't Respond

- Create a Narrative
 - ▣ Email Chains
 - ▣ Reference Your Awareness
 - ▣ Be respectful, but eager
- Consider a Team Effort
 - ▣ Volunteer/faculty contacts
 - ▣ Specialize your request
- Getting the Meeting
 - ▣ Options for days/times

Setting and Achieving Goals for the Meeting

- The meeting starts with the first contact
- Timing (keep it short)/Flexibility
- 75/25 Rule
- Gifts/Handouts/Leave Behinds
- An OCD approach to trip organizing

Remote Relationship Management

- Managing with your writing
 - ▣ Precise
 - ▣ Honest
 - ▣ Brief
 - ▣ Compelling
- Donor-Centric
 - ▣ Why would they want to hear from you?
- At all times, aim high and specific
- Skype is your Friend!

Leadership Gift Asks and Moves Management

- The Haggadah Rule: How is this gift different from all other gifts?
- Brand
- Impact
- Community
- Stewardship

Unhappy Donors and Other Visit Surprises

- #1 Job of fundraiser: Listening
- “Tell me more” —*Bruce McClintock, Marts and Lundy*
- Appropriate follow up and “promises”
- Examples

User Friendly Travel and Making it Fun!

- General Tips
 - ▣ Rewards/Hotels.com/planning ahead
 - ▣ Local News (buy a newspaper)
 - ▣ Stay in a convenient place, with your own bed
- Scout out some touristy things to do (lots of free activities, check out Groupons/Food Trucks)
- Visiting friends or family, adding on some extra time/days
- Ask the Locals (aka your prospects)
- Down time
- Most Importantly, BE FLEXIBLE

Thank You Letters

- Headlight Rule
- The Three Rules of Penelope Burke
 - Fancy
 - Handwritten
 - **FAST**
- Consider your signatories
- “Don’t waste my gift”

Contact Info



We love email!

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