The University of Colorado

Discovery Calls

Conversation Drivers & Key Indicators

Presented by

Matt Wasserman
Vice-chancellor of Development, CU Denver

Lisa Feldman
Assistant Vice President, Annual Giving

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Road Map

• List Management
• Tools & Resources
• Scripting
• Calling
CU Offers Excellent Customer Service

CU

PASSION

LOYALTY

COMMITMENT

Donor
Donor-centric Model

- Identify & Qualify
  - Build Trust Based Relationship
  - Locate & Confirm Philanthropic Passion
  - Match Passion to CU
  - Orchestrate Evaluation
  - Create Gratifying Gift Experience
- Gain Gift Commitment

Background information is Critical

- Year of graduation or parent year
- Degree(s)
- Past Giving
- Past Designations
- Affiliated with campus organizations?
- Currently on any boards or committees
- Recent events in life
- Etc…
Background information is Critical

• Giving:
  – Total giving amount
  – Last gift
  – Gift size
  – Years as a donor
  – Where was gift given to
• Who is the prospect manager? Are you on the team?
• Affinity – where on donor continuum
• GG+A rating
Working Smart for your Highest Return

• Goal: Meeting and exceeding Major Gift Officer Metrics
• Metrics and Methodologies
• Outreach Channels
  – Phone, e-mail, intro letter
• Other Resources
  – Board members, faculty, events, other donors, colleagues
• Continuous & creative contact

*It takes 3 - 5 contacts to secure 1 appointment*
Time Management

• Metrics
  - Segmentation
  - Prioritization
  - Follow the proven method

• Tips on time management
  - Calendar
  - Focus
  - Energy level
  - Creativity
  - Tools
Script: Secure a Visit

- Describe your role as seeking to deepen connections to CU (Campus Specific)

- You’d like to update them on __________ and bring them news from ______________

- Interested in learning from them as well

- Will be in your area __________ and hope to take them to lunch on ______________
Fundamentals of a Script

- Introduction
- Rapport Building
- Impact/Gratitude
- Be prepared to respond
- Next Steps
Discovery Meeting Tips

- Open ended questions only – get donors story on the table
- Show respect
- Warm them up
- Actively listen

*Discovery Meeting Process Guide*
Discovery Meeting Tips - Be Nimble

- Listening is KEY
- Allow for venting
- Acknowledge their perspectives, frustrations
- Never pass judgment
- Don’t pretend to have all of the answers but commit to helping them seek answers
- Always be gracious and follow the golden rule—The customer is always right!
- Determine next steps
Tips for SUCCESS!

- Persevere
- Strategies to handle “no”
- Schedule time and stick with it
- Be disciplined
- Keep your energy level high
- Stay up to date with your unit and CU news
- Practice active listening
Commit to Improve Your Craft

- Development is a vital piece of the University of Colorado
- You represent CU
- Seek out mentors
- Practice with supervisor and seasoned colleagues
- Roll play