



The University of Colorado

Discovery Calls

Conversation Drivers & Key Indicators

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University of Colorado

Boulder | Colorado Springs | Denver | Anschutz Medical Campus



Road Map

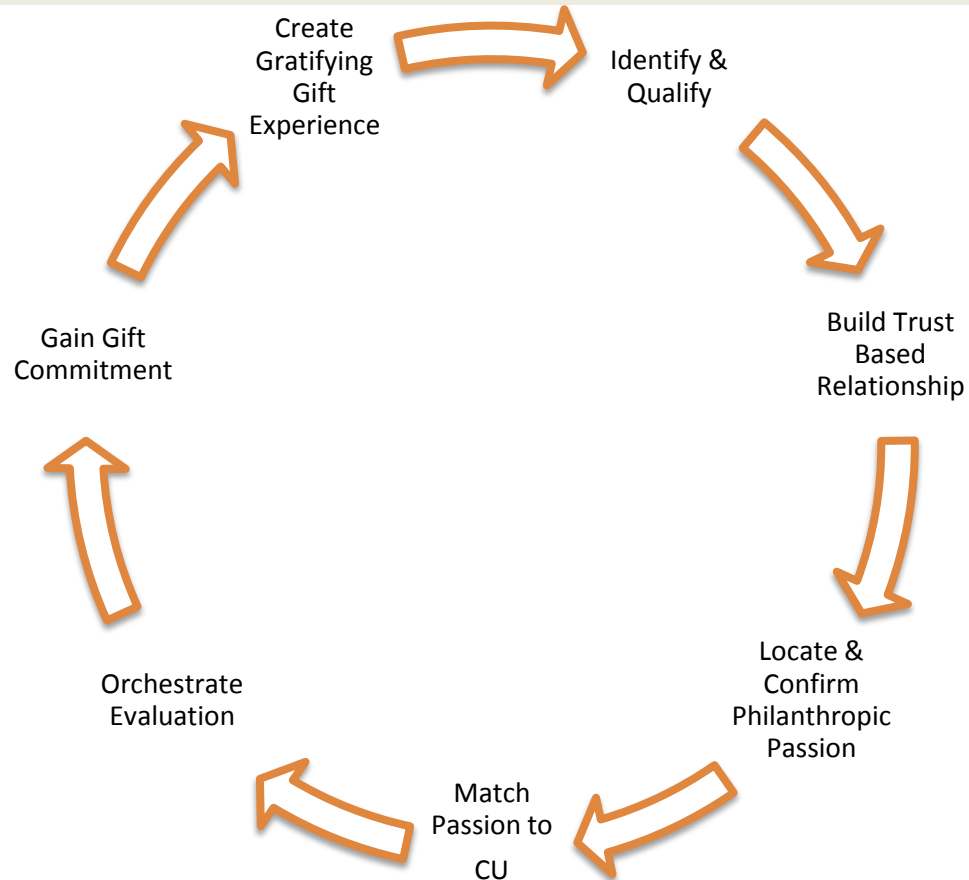
- List Management
- Tools & Resources
- Scripting
- Calling



CU Offers Excellent Customer Service



Donor-centric Model





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

