

# Successful Major Donor Conversations

The goal of every major donor engagement is to personally invite them to consider partnering financially with your ministry. Here are five action steps to improve your ask.

## 1. Scheduling the Appointment

The telephone call to schedule the meeting is often the most difficult part of the stewardship process. It takes discipline to set aside time daily and weekly to be on the phone, or text or both, encouraging partners, scheduling face-to-face visits, inviting them to large group briefings, or organizing home gatherings.

Here's a sample script:

*"Hello Bill, this is Fred, just checking in on you and Mary to hear how your summer is going..."* Continue the conversation with some small talk to ask what God is doing in their lives. People like to share their life with you--it's relationship building.

The phone call should accomplish five goals:

1. **Thank** them for their ongoing investment in your ministry and the eternal impact they are making with people you serve.
2. **Update** them on your life and their family, church, business, children, grandchildren, and plans that involve your ministry (prayer journey, a mission trip, special event). Invite them to a special event or perhaps to host a gathering in their home).
3. **Share your Excitement** about your campaign.
  - a. A story of how your ministry changed a life
  - b. One or two key metrics that demonstrate forward momentum
4. **Offer a Glimpse of the Vision.** Share your 60-second pitch about how this campaign will make a difference for Christ. Give a 30,000-foot overview of the key reasons for the campaign and why it's the right next step for your ministry.
5. **Ask for a face-to-face meeting.** *"Could we schedule a time to meet with you and share our Gift Proposal/Case for Support and invite your prayer support and financial partnership?"*

**Remember**—the goal of the phone call is to schedule the meeting, not ask for a gift.

**Q: CAN YOU JUST SEND US THE INFORMATION AND WE WILL THINK AND PRAY ABOUT IT?**

**A:** *Bill and Mary, this step of faith is so important, we feel the best way to share this information is in a face-to-face discussion. I know the summer months are busy. Could we schedule a time to meet in person? This project is important enough to the great commission and our ministry that we would like to meet you in person in your home. Would that be possible in the next few weeks?*

## 2. The Ministry Partner Visit

This kitchen table experience is where true stewardship decisions are made. The unique relationship between you and your ministry partners is most evident in this personal setting. You can share the story (the capital/capacity building campaign), make a request, and ask them to become “friend raisers” by encouraging them to network with their friends. These settings are intimate, and unlike a group setting, their questions come easily and can be answered in detail. You should visit with your top 50+ ministry partners in person every year in their homes.

## 3. Asking

An important aspect of the ask is clearly sharing the vision and answering every question.

### Q: WHY NOW?

*A: As we look at our opportunities to serve others, this campaign overcomes the critical ministry barriers we face. This new facility will help us reach more people more effectively. We are convinced that the hour is late and we sense an urgency from the Lord to accomplish all we can.*

### Q: WHY SO MUCH MONEY?

*A: We have carefully reviewed our needs and the space required to meet those needs. Our goal is to create a welcoming environment to solve our current restrictions and allow room for future growth. Our building will be functional, but not extravagant.*

### Q: ROI AND SROI?

*A: Return on investment and spiritual return on investment are easy questions for us to answer. Let's start with the spiritual return on investment. (Add some key metrics for your ministry.) We are good stewards of the resources God has entrusted to us. Our fundraising expenses are \_\_\_% of our budget, which aligns with other ministries of our size.*

**The Transition to the Request.** The “close” is critical to bringing your partner meeting to a conclusion. Ask these 4 questions of every ministry partner in this kitchen table meeting.

1. **Will you continue to pray for the ongoing ministry and for open doors as we share this campaign with our partners?**
2. **Will you consider a gift of \$200,000 dollars a year for the next 5 years over and above your current level of giving, for a total of \$1 million?**
3. **Who else do you know whom you believe may have an interest in this campaign? How could you help us open that door to an individual friend, family member, someone at your church, or a foundation/corporation/business contact?**
4. **Have you included our ministry in your estate plan? Would you be interested in a further conversation about that opportunity?**

## 4. Follow Up

The follow up is a key step in the stewardship process. If the partner requests some time to think and pray about their participation, consider these responses.

### 1. **Q: WOW, THAT IS MORE THAN WE WERE THINKING OF GIVING.**

*A: We understand... however, this is the largest step of faith in the history of our organization. We are asking our ministry partners to give careful and prayerful consideration to possibly making the largest generous, sacrificial gift they have ever made. We are convinced that Jesus could come at any moment and we desire to reach as many souls as possible for his glory.*

### 2. **Q: WE NEED SOME TIME TO THINK AND PRAY ABOUT THIS REQUEST FOR US TO PARTICIPATE.**

*A: Bill and Mary we are grateful for your past partnership and delighted that you think enough of this opportunity to take this before the Lord in prayer. Will a week or two be enough time for you to pray and make a decision? May I telephone you in a couple of weeks to answer any additional questions you may have and secure your answer and discuss questions 3 and 4? ("Who else do you know? Can we begin some preliminary discussions regarding your estate planning?")*

### 3. **Q: HOW COULD YOU HELP ME WITH MY PLANNED GIVING/ESTATE PLANNING?**

*A: For most of us, our largest gift may be one that we give as we graduate to glory. We have trained specialists who are experts in all areas of planned and deferred giving. They can help you by reviewing your existing plan or help you create a plan that will reflect your heart to impact the kingdom for God's glory. We can schedule a phone consultation with one of our experts.*

### 4. **Q: WILL YOU BE SENDING US A PLEDGE CARD, COMMITMENT DEVICE OR A LETTER OF INTENT?**

*A: Yes, once you have made your decision, we will send you a letter of intent. It will detail our understanding of your commitment and help us understand when you plan to fulfill your pledge. We can complete much of the information over the telephone.*

### 5. **Q: IF WE WERE TO HOST A SMALL GROUP EVENT OR INVITE OUR FRIENDS TO CONSIDER THIS PROJECT, HOW WILL THEY BE TREATED?**

*A: How do you want them treated? Would a face-to-face visit be the best way to share this opportunity with them? Would you consider hosting a gathering in your home? Would your friend attend one of our large group events? We will practice the "Golden Rule," treating your friends how we would like to be treated. We invite you to help us with a plan to share our incredible story with your friends and colleagues.*

**Write a hand-written thank you note to each ministry partner you visit.**

*"Bill and Mary, thanks for the opportunity for Jane and I to visit you in your beautiful home. What a unique opportunity to catch up on our lives and to share with you this exciting campaign. We trust you will give prayerful and careful consideration of our invitation to be a leader in this campaign with a 5-year commitment of \$1 million dollars. I will check back with you by phone on in a couple of weeks. Thanks again. Your friendship and partnership mean so much to us personally.*

## 5. Strengthening Your Relationship

Maintaining and strengthening your relationship with partners is critical for their long-term commitment to your ministry. This is not a grab-the-money-and-run scenario. It's a lifetime of leading them from an initial gift, to sustaining support, to a major gift, and finally to a legacy gift. We have invited them to a briefing, hosted them, and have drilled deeper with the relationship. Now we must we keep them informed about how their financial partnership is impacting others for Christ.

Even if they receive monthly direct mail, you should plan 4+ additional touches a year with Major Donors on your list.

All kinds of variables can be used, but the more personal, the better...

1. **Personal Contact** -- at their home, yours or somewhere on the road. This is not five minutes of "howdy," but an hour or two just catching up and loving on them.
2. **Phone Contact** -- a couple of times a year, or a couple of times a month depending on the relationship. Update them of the progress of the campaign. Share victory stories of people.
3. **E-mail or Text** or both is another way for quick, concise donor maintenance activities. Ask for prayer, share links to relevant news and videos on your website.
4. **Hand Written Notes and a Christmas Card**, perhaps even a birthday or anniversary card. It's an effective way to maintain and drill deeper with each relationship.

Personalize the contact plan for each ministry partner.

### Remember these Five Action Steps:

1. **Scheduling the Appointment**
2. **The Ministry Partner Visit**
3. **Asking**
4. **Follow-up**
5. **Strengthening your Relationships**

These five major donor strategies will bind your hearts with the hearts of major donors, as you "Command them to do good, to be rich in good deeds, and to be generous and willing to share. In this way, they will lay up treasure for themselves as a firm foundation for the coming age, so that they may take hold of the life that is truly life." 1 Timothy 6:18-19