Solicitation Training

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Nanette Fridman

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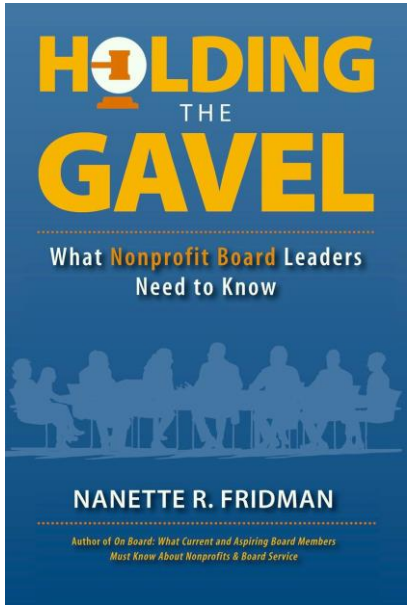
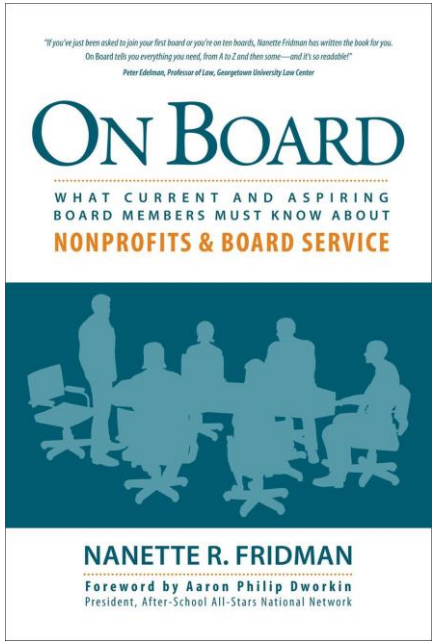
Introduction of Nanette Fridman

- President of Fridman Strategies, Inc.
- 25+ years of experience with nonprofits as a professional, lay leader, consultant & coach
- National speaker, trainer and facilitator
- Author of two books, *On Board* and *Holding the Gavel*
- BA, Tufts University
- MPP, Georgetown University Public Policy Institute
- JD, Georgetown University Law Center
- Harry S. Truman Scholar





In the Chat

- Your Name
- Your Synagogue
- Your Role
- What is the first word you think of when you hear fundraising?

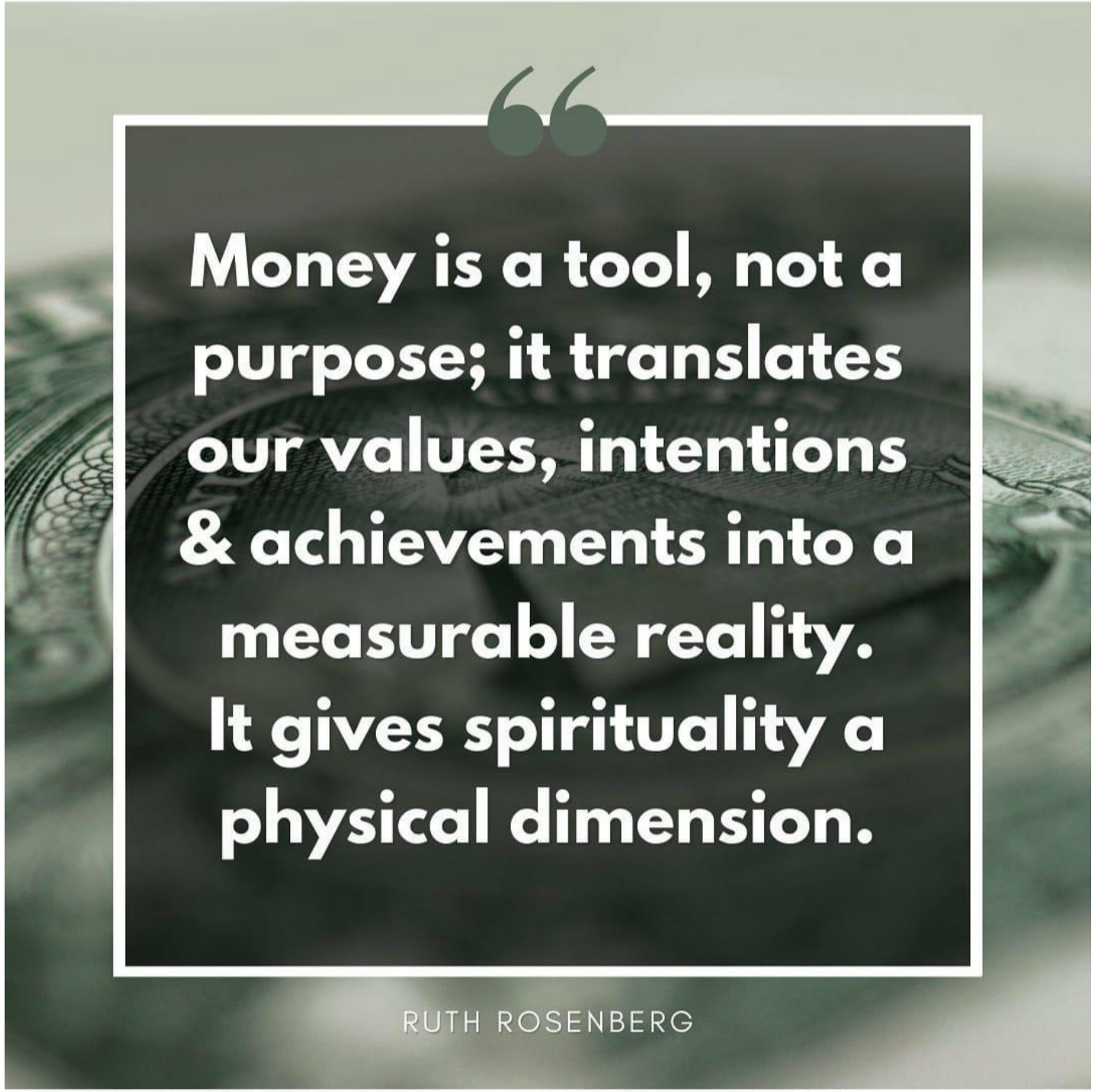
Goals

- To review the development cycle
- To walk through the steps to making an ask
- To practice soliciting

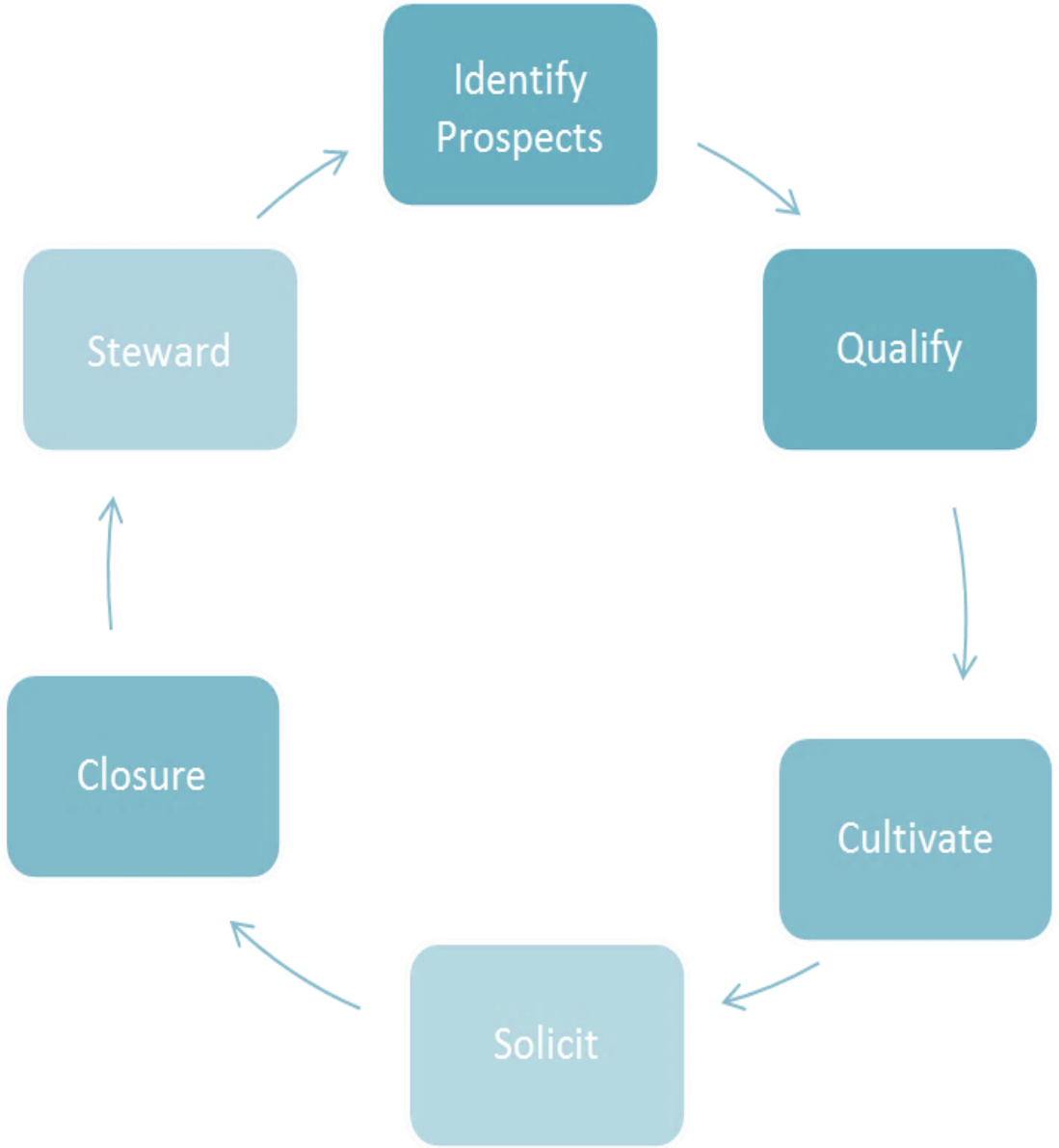
Warm Up

- Think back to the first time you made a donation with your own money
- How did you feel?

Mindset


Money is a tool, not a purpose; it translates our values, intentions & achievements into a measurable reality. It gives spirituality a physical dimension.
RUTH ROSENBERG

The Development Cycle



The Best Solicitation Occurs when the **Right Prospect** is asked for the **Right Gift** by the **Right Solicitor** at the **Right Time** in the **Right Way**

Donor Focused Solicitation

Preparing for the Meeting

- Donor Giving History
- Any Current Info (Tip: Quick Google or Social Media Scan)
- Ask Amount
- Review Talking Points/Case for Giving
- Current Reports (Annual)
- Engagement Opportunities (Events, Volunteering)

Getting the Meeting

What are some tips and tricks you use to get meetings?

Let's Practice!

Warm Up

- THANK YOU!
- Build rapport/Catch up – SCHMOOZE!
- Confirm amount of time donor has for meeting
- Ask open ended questions
- Listen – 80% vs. Talk – 20%

Presenting the Case

- Educate from the prospect's perspective
- Collect stories to show impact
- Show how the synagogue pivoted during Covid
- Demonstrate the synagogue is well-managed
  - What steps have been taken to ensure your financial health
- Convey need and urgency

Solicitation Meeting:
The Ask

- Thank you for your past support and for meeting today.
- Will you join us/continue to support our important work and consider a gift of $X for our annual campaign ?
- **SILENCE!**
- Listen for clues

Excuses and Objections

- Natural and predictable
- Tackle the objection and not the prospect
- Acknowledge what the prospect is saying
- Address the issue raised
- Ask again for a different amount
- Being comfortable and effective with objections comes with experience and the willingness to take risks

Always Be Closing

- Watch the time and donor's body language
- Restate the commitment or open questions
- Plan for next touch point
- Thank the donor
- Look to the future

The Right Next Steps After the Solicitation

- Immediately record donor's words, commitment and any interest areas
- Questions that donor wants answered or more information sought
- Personal note or email for meeting/gift
- Formal acknowledgement
- Formal thank you
- Plan next steps
  - Follow up required
  - Stewardship plan
  - If the donor has indicated the timing is not good, schedule the right time to revisit

Everyone must participate.

You will take turns being the donor and the solicitor.

Practice Makes Perfect

Annual Renew/Maintain

- **Donor: Sarah Stern**
- **The Story:**
- Sarah is a past synagogue board member. She came last month to a virtual program. Sarah gave $500 last year.
- **Your Assignment**:
- Ask Sarah to renew her gift for $500.

Annual Increase

- **Donor: Mark Cohen**
- **The Story:**
- Mark gives $2,500 annually to JF&CS. In the past, he has given $180 to your synagogue.
- **Your Assignment**:
- Ask Mark to make a $1,000 investment this year.

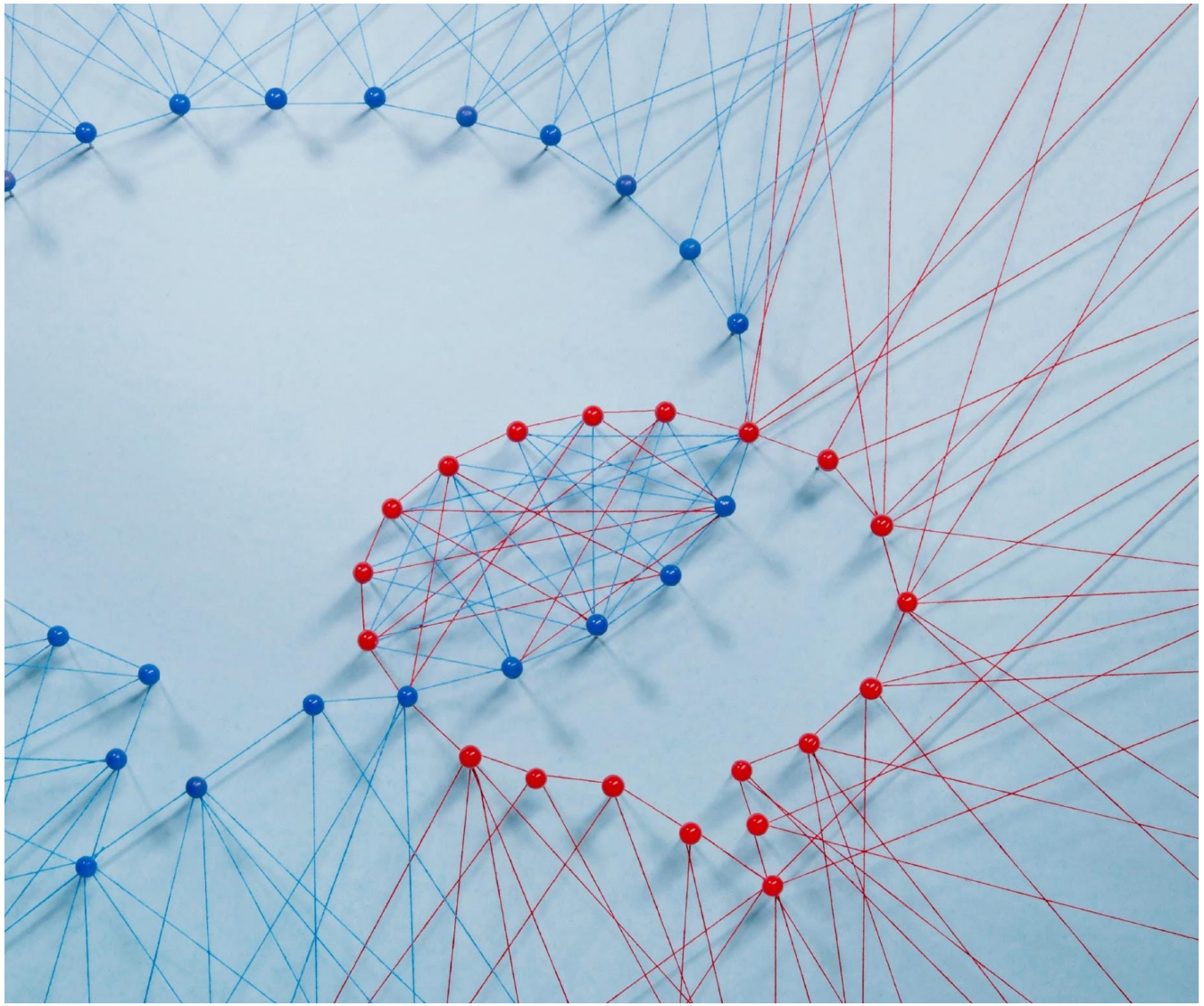
Reporting Out

- How did it feel to be the donor?
- How did it feel to be the solicitor?
- What worked well?
- What do you take away from this exercise?

Stewardship

- Acknowledge and thank
- Report back on progress and impact of their investment – at least 2x per year
- Further personal relationship - importance of assigning relationship manager
- Recognize
- Keep informed of your synagogue's developments

Q & A



Synagogue Series

- 2/10 10:30 am – 12 pm **Open Forum** (For past participants in the series)

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PLAN TO SUCCEED