Discovery Visits: Ready, Set, GO!

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ANIMAL HUMANE SOCIETY
Poll:
How many years have you been working in Development?

A. 1-3 Years
B. 3-5 Years
C. 5-7 Years
D. 7+ Years
What is a Discovery Visit?

ONE-TIME EVENT

PROSPECT
Y/N

“RE-DISCOVERY”
Why Are These Visits Important?

- Direct Engagement
- Information
- Communication
- Qualification
- Initial Cultivation
- ROI
- Focus Work
Visit Goal: One of Three Actions...

**YES**
There is evidence of capacity and possibility of developing interest.

**NOT NOW**
Possible future consideration and/or action.

**NOT EVER**
There is capacity, but likelihood of developing interest is too slim; or there is potential for interest but not enough capacity for major gift.
Introductory Letter

- LETTER SIGNED BY ED, CEO OR BOARD VOLUNTEER
- STATES PURPOSE OF THE VISIT
- SEND ONE WEEK BEFORE MAKING A CALL
Dear Kate,

I have an amazing story to share with you.

Last week a local shelter in Ithaca reached out to Animal Humane Society in need of help for a 12-year-old cat named Boots. She had severe glaucoma, several mammary tumors, and a severe urinary infection. Unfortunately, they didn’t have the resources to treat her.

“Would AHS take her?” they asked Dr. Brayshaw, our Director of Animal Services. Thanks to the support we receive from our community, he was able to say “yes!” without hesitation.

Last Thursday, Boots underwent the delicate and complex surgery she needed to save her life. Toward the end of the surgery, her heart rate dropped dramatically. Our vets jumped into action to save her. It was touch and go for a bit but Boots made it! She went home with Dr. Crothens, the veterinarian that performed her surgery, so she could be closely monitored and cared for around the clock.

I was so struck by Boots’ story. It’s a story about collaboration, determination, love, and it’s about YOU.

Why you, Kate?

Because you love animals and your generous support in the past has allowed us to grow into an organization that can help every animal—even those with complex medical conditions. Boots is on a life-saving journey—and it’s all thanks to animal lovers like you who make a difference in the lives of the 20,000 animals like her that come through our four shelters each year.

Kate, would you have 30 minutes to meet at a location convenient to you to talk about the life-saving work we do and your desire to make an impact? I will plan to follow-up next week and give you a Boots update if I haven’t heard from you.

FYI: I almost forgot an important line! Kate, meet Boots, the cutest orange tabby I know!

With gratitude,

Your signature

[Action Date Letter Date]

<Address>
<Address_line_1>
<Address_line_2>
<City>, <State> ZIP

Dear [Salutation],

Thank you for your ongoing commitment to making our community a better place. The Twin Cities is a vibrant place to work and live, and thanks to people like you, Minnesota is a leader in advancing the future of animal welfare.

As the President and CEO of the Animal Humane Society, I am reaching out to you at a pivotal time for our organization. After nearly 40 years of dedicated and innovative service to the animals and people of this community, we are developing plans that will position AHS for future success. Your feedback and ideas are critical to us as we formulate those plans.

With that in mind, I have asked staff to visit with select community supporters associated with Animal Humane Society. [PA_First_Name] [PA_Last_Name] from our Philanthropy team will be contacting you to learn more about your experiences with Animal Humane Society, and to gather your ideas and insight on our work and the issues animals in our community face.

[PA_First_Name] will be in touch with you later this week to schedule a personal visit. The visit should take no more than thirty minutes, and you will not be asked for a gift at that time.

If this information is incorrect, please contact [PA_First_Name] directly. [PA_Last_Name] business card is enclosed.

I would be very grateful if you would make time for [PA_First_Name] in your schedule.

Thank you for your consideration and for all you do to help animals.

Best regards,

Janelle Dixon
President and CEO
Poll:

How many times should you call a prospect before removing them from your list?

A. Three times
B. Five times
C. Seven times
D. Nine times
Making the Call

- Commit to making calls each day.
- Set aside one hour each day (10-12 calls).
- Call at different times during the day.
- Call each person at least 7 times (1x per week) before crossing off your list for now (call again in 3-6 months).
- ½ of all calls will result in a visit.
Pick Up the Phone

IF YOU GET AN ANSWERING MACHINE – LEAVE A MESSAGE

EXAMPLE
Getting the Appointment

- Prepare what you want to say but don’t read it verbatim.
- Keep an index card with 3-4 things important to remember.
- Be Conversational.
- Be Concise – purpose of your call.
- Pursue a specific meeting time and length (e.g., 30 minutes).
- Be patient and flexible in matching your schedule to the prospect’s.
- Persist in getting a face-to-face meeting.
- Use the influence of your organization’s reputation where appropriate.
THE CALL
Discovery Call Objections

The individual is too busy or does not want to meet in person.

One option is to ask them if they would answer a few questions about their experiences.
Sample Interview Questions

- You have helped the XYZ organization for (# of years); I am very interested to know what motivated you to become a donor to our organization.

- For first time donors – I noticed that this is your first gift to xyz – I am very interested to know what motivated you to make a gift to support our organization.

- How familiar are you with XYZ’s programs, services?

- Do you know how your support has helped (animals, children, etc.) in our community?
  - List some things or tell a very short story.

- Are there any areas we serve that particularly interest you?

- Do you have any concerns or questions that you would like answered?

- Have you ever visited any of our facilities? Would you be interested in visiting?

- If we need to get a hold of you, do you prefer I do that via email or phone?

- Thank you for your time today.
PAWS FOR QUESTIONS
You’ve Secured a Visit
Next Steps

Confirm Visit Details:
1) Send an email thanking them for agreeing to meet and confirming the date and time of the appointment.
2) Restate that you will take no more than 30 minutes.

Prepare for the Visit:
1) Review donor history (if donor), attendance at events, etc.
2) Bring copy of AR or brochure from your organization or nothing.
Prep-Work In Advance

- Prepare for the meeting...but not too much!
  - Review “available” information.
  - Remember your task: let your interviewee tell you the story.
  - Be ready to talk about anything—let him/her determine the subjects.
  - Know the top salient “Big Picture” points about your organization.
The Visit

Remember the Goal

Restate the Purpose

Discovery Questions
Determining Capacity

Visible signs of success.

Ownership of real estate, planes, or boats.

References to past or future travel, retirement homes.

References to success in financial markets.

Hobbies or pastimes.
Determining Capacity (cont.)

- Estate plans including charitable beneficiaries.
- Children and grandchildren being “taken care of.”
- Plans to pay for education.
- Volunteer commitments that presume affluence.
Tips for Discovery Visit Success
The Discovery Visit: “20” Questions

- **Family and Personal Information**
  - How long has your family lived in the area?
  - What brought you to the area?
  - Does your spouse’s family live here?
  - Children?
  - It appears you have an interest in (golf, tennis, art, etc.) Are you an avid collector?

- **Business Information**
  - How long have you worked at ________?
  - What is the nature of your position?
  - What led you to this line of work?
  - What are the trends in your industry today?
The Discovery Visit: “20” Questions

- **Relationship to Organization**
  - How did you first become involved with XYZ?
  - What would you describe as the strengths of XYZ?
  - Are you acquainted with any of our leaders or staff?
  - Do any of your family members or friends have relationships with XYZ?
  - What do you think we can do better?

- **Volunteer/Philanthropic Involvement**
  - Are you involved with other not-for-profit organizations?
  - How do you decide which not-for-profit organizations to get involved with?
  - In your opinion, how could XYZ be more responsive to their constituents and effective in mission fulfillment?
At the End of the Visit…

**Thank-you letter/note/email (within 48 hours)**
- Recap visit.
- Information promised.
- Reiterate “ask for something.”

**Call notes (within 3 business days)**
- In donor database: if it is not in the system, it did not occur!
- Determination of assignment/qualification.
- Referrals.
Discovery Calls: Contact Reports

Why are contact reports (notes) important?

What is distinctive about a contact report?

What goes in?

What stays out?
Results . . .

The Numbers - June 2018 to July 2019)

- Total prospects
- Visits Secured
- Prospects Qualified/Disqualified

Success Stories

- Kelsey Polcher, Gift Officer, Animal Humane Society
QUESTIONS?
THANK YOU