VERITUS GROUP
Building Authentic Donor Relationships

INTRODUCTORY CALL STRUCTURE

- ☐ **Connect & Align** – Letting them know the purpose for the call
  - ☐ Thank them for their support
  - ☐ Introduce yourself (you are calling to follow up on the Introductory letter and to learn how best to serve them)
  - ☐ Align on the purpose of the meeting
  - ☐ Confirm the amount of time the donor has to chat
  - *Transition: Do you have a few minutes for me to ask a few questions about your connection to our organization?*

- ☐ **Be Curious** –
  - ☐ What inspired your first gift to ORG?
  - ☐ What inspired you to give to project X?
  - ☐ Other engagement questions to learn more, if they're willing
  - *Transition: Thank you so much for sharing. I have one more question about how we can best contact you, if that's okay.*

- ☐ **ASK** something of the donor –
  - ☐ Say something like: "I'll be sending periodic updates. What's the best way for me to personally communicate? By mail, email, text, or phone?"
  - ☐ Or, if they're very engaged, ask, "Would you be interested in touring our program or to attend (an event)?"
  - *Transition: Thanks. So, let me confirm…*

- ☐ **Align** again –
  - ☐ Confirm contact information, including email address if you don't have it & that's their preference, ask for their cell number.
  - ☐ Or confirm that you'll be sending details about the tour/event.
  - *Transition: Can I take one more minute to share an impact story with you and recognize your history with us?*

- ☐ **Celebrate** –
  - ☐ Thank them again for their support and belief in your mission
  - ☐ Tell short story of a life changed.
  - ☐ Report back on their lifetime giving or number of gifts and/or impact.

Following the call, note in the database the entire tone & tenor of the conversation:

- ☐ Anything about family relationships
- ☐ Anything about specific interests, career, hobbies, etc.
- ☐ Anything about giving capacity, other charities of interest
- ☐ Update contact information or communication preferences if they've changed
- ☐ If this was a Qualification call, adjust ownership or status of the record.
- ☐ Enter key items learned in the DEP regarding communication preference, interest in org, important note(s).

Also, make a plan/next steps to follow up with donor based on what you learned.

Next Step	When Will You Do It?	Who Needs to be Involved?

POST-CALL CHECKLIST
Use this checklist to ensure you've completed all of the steps outlined above.

- ☐ Made thorough notes in database
- ☐ Changed ownership in the database and DEP
- ☐ Added key information to DEP
- ☐ Adjusted communication touch point plan to account for new information regarding interests, requested information, etc.
- ☐ Identified next steps to follow-up with donor
- ☐ Set deadlines for follow-up steps
- ☐ Reached out to other team members who need to be involved in next steps (if applicable)