2019 AFP ICON
Face to Face for the First Time with a MAJOR Donor
(or any donor really)

Marcy Heim, CFRE, PLCC, The Artful Asker

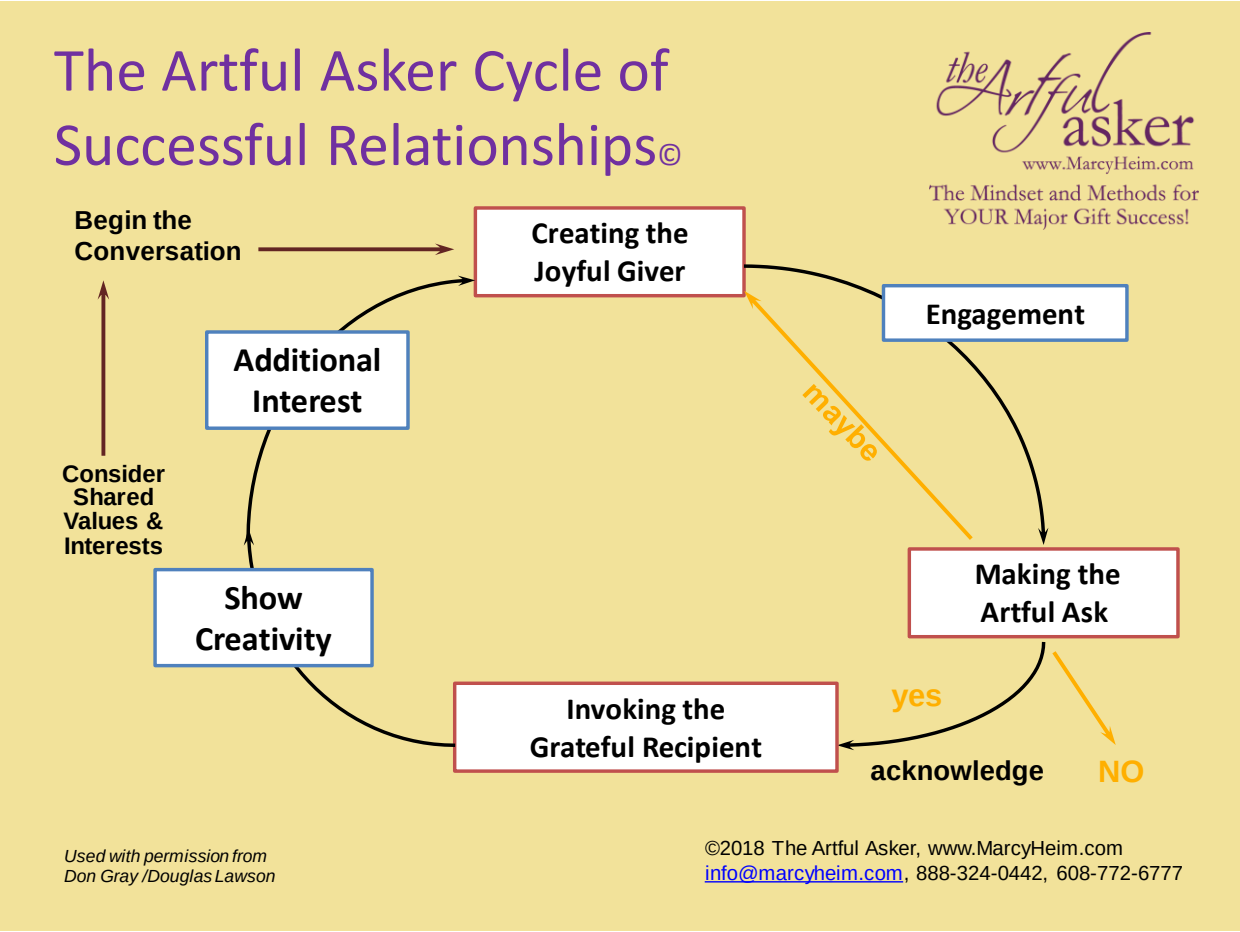
WHAT: When to get Face to Face, How to get Face to Face, Do's and Don'ts of the actual first visit

HOW: Techniques to use to secure that first visit.
Moving from TRANSACTION to RELATIONSHIP.
Mindset needed to be successful in this step. (Ridding you of "They don't want to meet with me.")

SING: People love to give me MONEY! And I Want to Feel Like That

WHY: Our current major givers have cultivation plans. We must be strategic with the next set of major donors coming along. We need to explore where our values and interests align and deepen the connection with them. THAT happens best in a personal visit.

A confused fundraiser doesn't ask. A confused donor doesn't give. A confused volunteer or board member doesn't help.



DETAILS:

1. Segments to connect with:

    - High end Annual Fund givers.
    - Upgrade specific group of givers.
    - Consistent AF smaller givers
    - New 'surprise' givers.
    - Prospective Estate givers
    - Brand new – Exploring potential fit with you.
    - "Users" and their circles.
    - Others?

2. The power of your Mindset – setting intentions
    a. The Key to Success and taking responsibility
    b. Talking about money
    c. The Words we use

3. Do's
    a. Understand it's scary for them too. Be fun and polite.
    b. Build sincere rapport.
    c. Be sincerely interested in them.
    d. Discover personal preferences.
    e. Dream with them.
    f. Firmly set up the next step.
4. Don'ts
    a. Treat them like a wallet or AFT Machine
    b. Interrogate them
    c. Judge them
    d. Talk too much

Thank you and Invest in JOY!

Marcy's a proven major-gift expert, life/fundraising coach, author, speaker, singer and mom. She inspires others to create their mindset and actions for optimal giving results and joy. For 23 years she managed her major gifts team at the UW Foundation team through 3 campaigns, one $1.8 billion. She been awarded the CASE Crystal Apple and AFP Outstanding Fundraiser and has been featured internationally for 10 years. GET HER BOOK WITH THIS ASK at the AFP BOOKSTORE! Only 40 copies are available! Her book, "Empowering Your Board to Serve as Effective Development Ambassadors" guides her board educational experiences.

Remember!

We become what we think about!
I create my life!
People Love to give me money!
Something Goooooooods gonna happen to me!