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**FANTASY PHILANTHROPY CHALLENGE**

**SUGGESTED SCRIPTS**

**We have made every effort to design your team’s Player List (of donors and prospects) with your connections, affiliations and strengths in mind. We hope that reaching out to your constituents will be natural, easy and a pleasure. In case you need it, below are sample scripts for email and phone. Feel free to modify them to reflect your style. United We Win!**

**E-MAIL**

**Email First, or Call First?**

Should you email first, or call first?

My recommendation is that emailing before calling works best.

The intro email paves the way for a follow-up call. It gives the prospect a sense for who I am and why I’m reaching out. That way, during the call I’m able to focus on building rapport and nailing down a date/time to meet.

If you don’t have an email address for your prospect, just go ahead and call.

**Your Framework for Success**

Successful emails share much in common with [successful phone messages](http://101fundraising.org/2014/07/get-prospects-call-back/):

* Short – 5(ish) sentences ideally, perhaps as high as 8-9 for first emails.
* Simple – Make your email about one thing.
* Get to the point early – Don’t make your prospect wade through a lengthy preamble before making it clear what you want. This instinctively feels sketchy to people.
* Provide relevant context – They’re going to ask *Why me?* Don’t make them guess.
* Down-to-earth – Use simple, uncomplicated language. Don’t be stuffy.

**Word-for-Word Script 1**

*Hello [Name],*

*Greetings from United Way of Greater Chattanooga! I hope this note finds you doing well.*

*I’m writing because I’d like to get on your calendar in the weeks ahead. With so many new developments underway at United Way, we want to make sure we’re keeping current with donor attitudes and perceptions. Your feedback is very valuable to us! Plus, I’d be interested to hear about what’s new with you.*

*Perhaps we could meet in person for lunch or coffee. I will call you soon to see if we can arrange a time.*

*Hope to see you soon!*

*Warm regards,*

*[Your name, title, etc.]*

**Word-for-Word Script 2**

*Hello [Name],*

*I’m writing because I’d like to get on your calendar in the weeks ahead.*

*Our community’s challenges probably aren’t news to you, but for example, did you know Chattanooga is one of the worst places for a child to grow up poor, yet we are one of the most generous communities in America? You’ve probably heard a lot about how the United Way of Greater Chattanooga brings together people in need with people who want to help. We’re constantly eager for feedback from community leaders and United Way supporters like you. I’d love to hear your thoughts.*

*Perhaps we could meet at [restaurant] on [street near prospect’s home or office.] I’ll call you soon to see if we can arrange a time.*

*I trust your summer was a good one. I look forward to connecting soon!*

*Warm regards,*

*[Your name, title, etc.]*

**Email Tips**

The first question to enter your prospects’ minds when they open your emails is going to be, “*Why me?”*

So make it about *them!* This isn’t the time to tell them everything about the United Way. And it’s certainly not the place to talk about how “ground-breaking,” “life-changing,” “innovative,” or “world-class” we are.

The most powerful, most *relevant* connection you can have is a referral. *“Jim suggested I reach out.”*  If you have a referral, use it! And at the very beginning of your email.

Here are some other ideas:

* *“I understand you attended our event last month.”*
* *“Your past support is much appreciated.”*
* *“I admire your work/leadership in our community and would welcome the chance to hear your feedback on [issue related to your cause].”*

**Scaling Up or Down**

Not convinced the person you’re contacting is major gift prospect?  The sample emails above are “scalable.” Take things down a notch by swapping “lunch” for “coffee.”

Or, on the flipside, maybe the prospect should get attention from your most senior leadership. It’s pretty easy to adjust it to say “Lesley Scearce and I would like to take you to lunch.”

For known major prospects, you might also want to change your approach to the *Why me?* question. Consider framing lunch as an opportunity to discuss high-level involvement instead of simply offering feedback. Something like this:

People like being recognized for their expertise. And since giving tends to follow involvement, get your prospects plugged in by tapping into their relevant knowledge and skills.

**Subject Lines**

In many ways they’re the difference between an email that gets opened right away, one that gets flagged and perhaps opened later (usually not), and one that’s never opened at all.

Try and follow these general guidelines:

* Relevance is key
* Arouse curiosity where you can
* Avoid subject lines that sound like the mass marketing emails

Here are some sample subject lines that work well:

* [Org name]: Lunch? Coffee?
* [Mutual acquaintance] suggested I reach out
* Would love to get your feedback

**PHONE**

**Before the start of any call:**

* **Discuss strategy for the prospect with the UWGC Staff** – We have suggested ask amounts for each donor/prospect on your team’s list. Prior to reaching out, please connect with a member of our Philanthropy team, or Scott Koskoski, and discuss background information, agenda and strategy for that donor/interaction. We are here to set you up for success!

**When you call**:

* **Confirm that it’s a good time to speak** - We understand how time sensitive some of our interactions may be, so it’s better to find a good time to talk then rush through poor-timed conversation.
* **For someone you know** – “Hello NAME, I hope you’re doing well. I’m calling as a Board member of the United Way of Greater Chattanooga and wanted to say thank you for all of your past support. I’d love to get on your calendar to have a conversation with you about what the United Way is doing in the community and get your feedback. It may even be a great time to discuss your next campaign pledge if you’re so inclined.”
* **For someone you don’t know** – “Hello NAME, a Board member with United Way of Greater Chattanooga. I was given your name as a *past leadership donor* and wanted to introduce myself, learn more about you and your connection to the United Way, give you a sense of how impactful your support has been, and see if there was a possibility to discuss your next campaign pledge.”

**WHAT IS THE GOAL?**

Ideally, you are able to arrange and hold face-to-face meetings with as many donors and prospects as possible. Personal touch and “knee to knee” conversations go a long way! These are great opportunities to strengthen relationships.

**FREQUENTLY ASKED QUESTIONS / WHAT IFs?**

* **What if someone doesn’t want to meet in person?** That’s OK. It likely won’t be possible to physically meet with 100% of your list. Ask if the United Way can call to follow-up with an update on the donor’s giving and an invitation to support this year’s campaign.
* **What if someone prefers to talk by e-mail, phone or even text?** That’s OK. We strive to honor a donor’s communication preferences most of all. While we aim for an in-person meeting, we aim most of all to deepen the relationship and invite the donor’s financial support. (Please send us updated contact info if you get it!**)**
* **What if someone says “no” to an ask?** That’s OK. Please thank the person for their time, confirm it’s OK for the United Way to keep the person on our mail list, gather any feedback the person is willing to share, and report your notes to us. Depending on the situation, the United Way may follow up.
* **What if someone says they’ve already made a gift this campaign year?** That’s OK. Please thank the donor for their generous pledge and say you’ll update the United Way. We will check our records and follow-up with the donor as necessary.
* **What if someone says they want a gift to count toward their company campaign total?** That’s OK. Please encourage the donor to make their pledge, and email that information to us. We will contact that employer’s Community Champion and let them know and work through the back-end process.