



CONNECT, COLLABORATE &  
CLOSE!

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*Presentation prepared for:  
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# AGENDA



HOW TO  
RESEARCH AND  
CONNECT TO  
PROSPECTS



HOW TO  
DEVELOP  
RELATIONSHIPS  
WITH FUNDERS



HOW TO  
RECRUIT  
VIRTUAL  
VOLUNTEERS  
USING SOCIAL  
MEDIA



HOW TO USE  
THE 4P's OF  
PROSPECTING  
TO GAIN  
INTEREST IN  
YOUR  
INITIATIVES



HOW TO CLOSE  
USING 3 STEPS  
FOR  
SUCCESSFUL  
OUTCOMES



**Connect.** Collaborate. Close

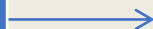
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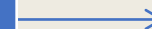
1. How to Research and Connect to Prospects

# Reasons to Perform Prospect Research

Discover new donors who give to similar causes



Review donor history so you can create a better Ask;



Obtain cleaner data and update your donor database




## Traditional Methods of Performing Prospect Research

- ***Nonprofit involvement:***  
Nonprofit board and foundation members typically understand the importance of supporting organizations financially;
- ***Real estate ownership:***  
Donors who own \$2+ million in real estate are 17 times more likely than the average person to give to a nonprofit.

# Traditional Methods of Performing Prospect Research

- ***Employer information:*** Donors may have colleagues with similar salaries and who donate to causes.
- ***Personal information:*** Insights into hobbies and basic contact information support your donor communication.





# My Method of Prospect Research Explained

## Individual Giving

- LinkedIn or Google Alerts (if they are not on LinkedIn)
- Personal Summary
- Philanthropic History
- Contact Information

# My Method of Prospect Research Explained

## Funders

- Board Affiliation
- Giving History
- Annual Report
- Funder Guidelines
- Contact Information

# My Method of Prospect Research Explained

I use my research to create:

- The Ask
- Communication
- Cultivate Relationships



# AGENDA

1. How to Research and Connect to Prospects
  - a. **Connect with people who are allies to your industry. Consider the following candidates...**

# The Candidates

*Answer the question, “Who can I connect with that is passionate about my industry?”*



*Wendy Writer*

Wendy lives on social media. She writes thought provoking posts. Wendy has a moderate following and doesn't mind sharing great content.

# The Candidates

*Answer the question, “Who can I connect with that is passionate about my industry?”*



*Sharing Sam*

Sam loves sharing content that's important to him. Sam only comments or shares others posts, and does not necessarily write his own. Sam is a meme posting, GIF generating type of person.

# The Candidates

*Answer the question, “Who can I connect with that is passionate about my industry?”*



*Irene Influencer*

Irene’s social media influence is the stuff dreams are made of. She can catapult your org’s presence into the stratosphere. Irene is not a superstar, but an influencer that has a great reputation related to your industry.

# The Candidates

*Answer the question, “Who can I connect with that is passionate about my industry?”*



*Freddy the Fan*

Freddy represents your supporters; the backbone of your digital presence. They are your foundation. They love your ideas and want to see you win. Your supporters have a network, too.





# AGENDA

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2. How to Develop Relationships with Funders & Prospects



Connect. Collaborate. Close

Once you connect with your prospect, use your research to develop a relationship with the potential investor. Ex. board affiliation, university alumni, peer connection, media connection, etc.



# Questions to Ask Yourself...

- How do you engage prospects?
- How do you maintain relationships with current donors?
- How do you keep the momentum going?
- How do you handle lapsed donors? (*review the handout*)



**20x5 DONOR CONNECTION MATRIX**

A decorative floral wreath composed of various colorful flowers like daisies, tulips, and sunflowers, arranged in a circular pattern around the text.

## **20% CALL TO ACTION**

Include call to actions in 20% of your communications.

This is the "getting to the point" part. You have to direct the reader to the reason for contact and the result needed from it.

A decorative floral wreath composed of various colorful flowers, including daisies, sunflowers, and smaller blossoms in shades of pink, blue, yellow, and white, arranged in a circular pattern. The wreath is set against a light gray background.

## **20% UPCOMING EVENTS**

If your organization has transitioned to virtual events, inform your donor or prospect. It shows two things: innovation and commitment to your mission.

A decorative floral wreath composed of various colorful flowers, including daisies, sunflowers, and smaller blossoms in shades of pink, blue, yellow, and white, arranged in a circular pattern. The wreath is centered on the page and serves as a background for the text.

## **20% SUCCESS/CAMPAIGN RESULTS**

Your organization has had success in the past; remind your donor and prospect of your success. It will make them believe you can do it again.





## **20% DONOR/PARTNER LOVE**

Your volunteers, sponsors, and social media ambassadors have one thing in common: they are your cheerleaders. Remind your donor or prospect that they are not alone in supporting you.



# **20% CLIENT STORIES/TESTIMONIALS**

Create your organization's 2021 nonprofit story.



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3. How to Recruit Virtual Volunteers Using Social Media



# Volunteer Involvement

When you engage volunteers who were once donors, remember...

- You already have access to them;
- They are still interested in your cause;
- Show appreciation (virtual lunch, Zoom briefing, then do a call to action, remind them what's coming)



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# Volunteer Involvement

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When you engage volunteers, who are new to your organization..

- Send an invite or do a call for volunteers.
- The response you receive will tell you of their continued interest.
- A NO means one of two things: no interest, or lack of time. To find out which one, offer varied schedules and see the response.
- When I talk to prospects or donors, the number one reason they do not volunteer... “I’m was never asked”

LinkedIn *for Good*

Find the right volunteers or board members!

Advanced Search: A **free** hidden gem for nonprofits

Start searching at [lnkd.in/volunteer](https://lnkd.in/volunteer)

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4. How to Using the 4Ps' of Prospecting to Gain Interest in your Initiatives

# 4P Method of Fundraising

Keep your message brief, to-the-point and compelling

Generate social proof. Use LinkedIn to follow prospects or join groups related to your industry.



Focus on providing the information they want to know, not on what you have to say.

Share company updates or campaign results.



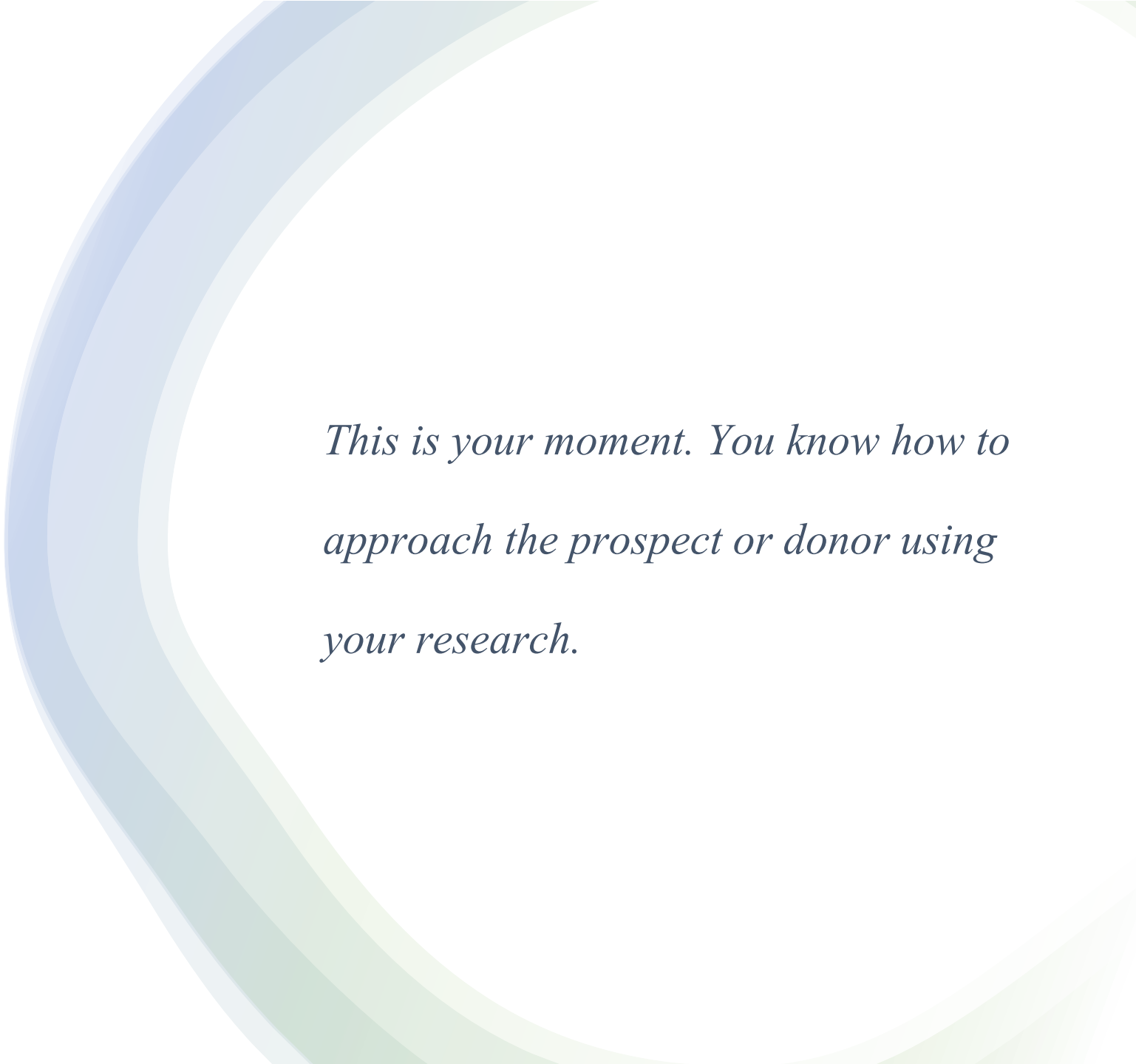
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5. How to close using 3 steps for successful outcomes.



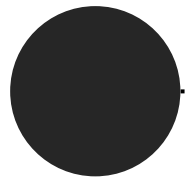
Connect. Collaborate. **Close**



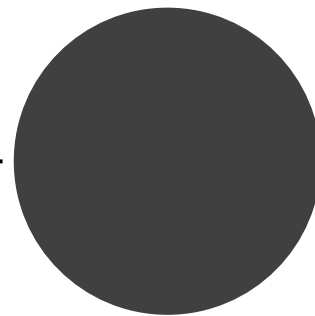
*This is your moment. You know how to  
approach the prospect or donor using  
your research.*

In your **Close**, remind your prospect of three important points:

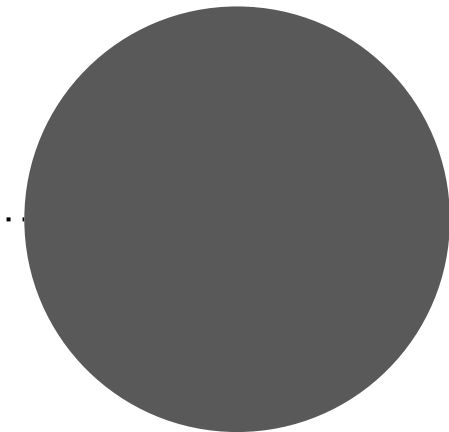
The milestones achieved



The timeframe for your  
campaign/initiative



The future (forward  
thinking)



# LAPSED DONOR CHECKLIST

## PREPARE

### *Define, Review & Segment*

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- DEFINE THE TERM "LAPSED DONOR"
- REVIEW DONOR GIVING HISTORY
- SEGMENT YOUR DATABASE

## ENGAGE

### *Ask & Invite*

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- ASK ABOUT DONOR'S CURRENT INTERESTS
- ASK ABOUT PREFERRED METHOD OF ENGAGEMENT
- INVITE DONORS TO THE NEXT ONLINE OR IN-PERSON EVENT

## FOLLOW-UP

### *20x5 Method*

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- USE THE 20X5 DONOR CONNECTION MATRIX



Get the **20x5 Donor Connection Matrix**

Click the **purple** bar → [fundjoy.org](https://fundjoy.org)



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