

Extraordinary Donor Experiences (EDEs)

Creating Joyful Givers Who Look Forward to Hearing from You!

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Extraordinary Thank Yous

I have a theory that I can't prove, I think the manner of your thanking donors matters just as much to your revenue (maybe more) than the manner of your asking.

My advice? Begin your relationship with an extraordinary THANK YOU.

Want to Up Your Thanking Game?

ALWAYS send handwritten thank you notes with first-class stamps on them EVEN if your organization sends a form letter. This gives you an opportunity to show the donor how much you appreciate them, have heard what they said, and helps build strong ties.

And call your major donors as well. This small gesture improves retention rates, dramatically, even if you simply leave a message (which will be most of the time)!

Follow the 3 P's:

- Prompt (within 48 hours of the gift)
- Personal (say what the gift will do for your beneficiaries – or “the problem” it will solve, “the opportunity” it creates, etc.)
- Profuse – write as if you are writing a love letter to a dear, dear friend. Keep your communications cordial, even somewhat formal until the donor indicates they would like to interact more informally.

Donors will be delighted that you have treated them with respect and care.

Extraordinary Donor Conversations

Start conversations with a beautiful question and you will have a beautiful conversations.

Simple questions will elicit simple answers. As fundraisers, we need to go deeper to the very hearts of our donors.

Extraordinary things happen when we formulate questions that invite honesty, dignity, and revelation. Spend some time formulating and asking better questions and watch what takes place!

Here are some questions that lead to joyful, informative experiences.

- Where does this love of XYZ organization originate?
 - Your donor probably has an amazing story to tell about why she cares. It's a story that may come deeply from her heart. She is probably dying to share her story. But no one is asking. And it will bring her immense joy to share it!
- Tell me about what led you to make your first gift to XYZ organization?
 - As fundraisers, we share a lot of information with our donors. Often, we don't ask donors to talk to us enough.
- Tell me about how you were influenced to be generous?
 - You'll find out about your donor's philanthropic priorities. What is he or she giving to? Where else is she involved? What are her commitments? Who else may be influencing his giving decisions?
 - Major gift prospective donors are happy to share their philanthropic vision with you and they appreciate being asked. It creates an openness and trust in your relationship that you can build on with each new interaction.
- What are you passionate about?
 - Invite your donor to delve deeply into what they care most about. Think big, philosophical questions that reveal what is at stake in human terms for us all. There is value in learning to speak together honestly and relate to each other with dignity. AND it will solidify the reasons why your donor supports your organization.
 - It is in the search for our deepest values that we find meaning. Take your donors on this journey by asking broad and meaningful questions.
- What part of our work interests you most?
 - Once you find out your donor's interests, then you can help her learn more about her favorite area.
 - When you find out her passions and interests, you can design personalized engagement experiences for her that will delight her and bring her joy.
 - Then it's easy to simply ask for permission to ask. And presto! You are discussing her gift and what she wants to accomplish with her investment in your work.
- What is the best experience you've ever had in making a charitable gift and why?
- Ask for advice and input.
 - If you're working on a project for your organization, your most loyal donors can often provide meaningful input. And they LOVE being asked!

- “How would you approach funding this project for our beneficiaries?”
- “Who should be at the table?”
- “Can you think of anyone who might like to hear about this effort?”
- “Who can open the door for me and make an introduction to that person?”
- Ask for permission to proceed.
 - When you want to move into a different area of conversation . . . “would it be okay if we talked about ___ on our next visit?”
 - If I may, can I ask you about . . . ? Or “would you like to” . . .
 - These questions respect the donor’s boundaries and make them feel consulted before you dive into a sensitive question about their feelings or their giving. By asking for consent, you make donors feel like it’s about them, that they are in charge of the process. *And most importantly, they never feel pushed.*

Measure the strength of a question by the honesty and eloquence it elicits.

Be a good listener and react authentically and generously. Remember, you honor your donor by listening to him or her.

Want Extraordinary Investments from Your Best Donors?

Treat Them Extraordinarily Well!

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**1. Overly impressed by the wealthy screening score and capacity of your donors?
Want to impress them with how wonderful your organization is? Think again!**

- **FACT:** High net worth individuals (in fact all of us, right?) can sense when a person is pursuing them for their money alone. They know that *you* know they have wealth. And they can sense that some people don't give a hoot about who they are beyond their wealth.
- **TAKEAWAY:** Be really clear with yourself that you are going to treat every donor on your portfolio with EXTRAORDINARY CARE. People will sense that and respond generously to the care you took to encounter them as A PERSON.

2. Are you taking time to get to know your donors? Money isn't the only factor influencing their generosity.

- **FACT:** If all you look at is your donors' wealth screening data then you are missing much more about the ESSENCE of the person.
- **TAKEAWAY:** Explore the donors' interests in your organization and their accessibility to you. *If they love you, go for it (in time, of course)!* However, if you are low on their pecking order of interests (Dolphins may be their first love) then how can you expect to get a major gift from them? AND if you can't meet with them (even over Zoom) or they don't respond to your outreach then their wealth is of no use to you. Don't hound them or consider them qualified for your portfolio. MOVE ON!

3. Your fundraising goals are important, but your donor's personal timetable must take precedence. Be sensitive to THEIR needs, challenges, and desires.

- **FACT:** Rush into an ask for a gift that you are feeling pressured to get for your organization's financial goals and you'll KILL your fledgling (or hard earned) relationships with your donors.
- **TAKEAWAY:** Remember, your bosses' short-term goals are important, but they can *wreck* a long-term relationship if you rush into an ask before a donor is ready.

4. Did you know that the more a donor participates in a gift ask (YES, you read that right!), the bigger the gift?

- **FACT:** You use your amazing people skills within your organization to do all the fact-finding that will be necessary to create a big ask but you never consult the donor on what HE would like to see happen. Result? You're leaving money on the table (and it could be a lot)!
- **TAKEAWAY:** Larger, transformational gifts come from long-term relationships with donors. This takes TIME and is the product of *many* conversations with a donor. Patience with the process of collaborating with your donors to solve the most pressing needs or OPPORTUNITIES for your beneficiaries will pay off wildly in the end. *Ask your donors how they might like to help you grow!*

5. It's vital for you to create donor gratitude reports that illustrate the impact of your donor's investment in your mission at least once a year.

- **FACT:** Donors enjoy the swift thank you notes you send, but the donor gratitude report they receive 6 months later (with authentic stories of beneficiaries of their generosity) will deliver even more **donor joy** as it completes the journey you have taken them on, from asking to thanking to finally reporting impact! Indeed, a deeply emotional donor gratitude report that illustrates why their investment matters helps ensure their next investment in your work.
- **TAKEAWAY:** Gather stories of impact all year long and share them passionately in the donor gratitude reports you create. Use 2-3 of your best stories of impact. Be sure the report is mailed to all your major donors *and* posted on your website. *And be sure to make the donor the hero of the impact – NOT YOUR ORGANIZATION.*

PRACTICAL PLANNED GIVING CONFERENCE SPEAKER EVALUATION

Date: _____ Speaker: _____

Name (optional): _____

Please rate the following:

| | Excellent | Good | Neutral | Fair | Poor |
|---|-----------|------|---------|------|------|
| I. OVERALL | 5 | 4 | 3 | 2 | 1 |
| Were your major objectives for this session met? Was the content of the session vital, timely, substantive? | | | | | |
| Comments: _____ | | | | | |
| _____ | | | | | |

| | | | | | |
|--|---|---|---|---|---|
| II. RELEVANCE | 5 | 4 | 3 | 2 | 1 |
| Was the subject matter directly related to the requirements of your job? | | | | | |
| Comments: _____ | | | | | |
| _____ | | | | | |

| | | | | | |
|---|---|---|---|---|---|
| III. VALUE | 5 | 4 | 3 | 2 | 1 |
| Do you believe the benefits of this session were worth the time, effort and cost? | | | | | |
| Comments: _____ | | | | | |
| _____ | | | | | |

| | | | | | |
|---|---|---|---|---|---|
| IV. SPEAKER | 5 | 4 | 3 | 2 | 1 |
| How was their presentation style? Did the session move along at the right pace? Did they have appropriate knowledge on the topic? | | | | | |
| Comments: _____ | | | | | |
| _____ | | | | | |

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|---|---|---|---|---|---|
| V. MATERIALS | 5 | 4 | 3 | 2 | 1 |
| Were the materials clear and organized and appropriately helpful for the session? | | | | | |
| Comments: _____ | | | | | |
| _____ | | | | | |

Vi. What did you like the most about the session?

VI. Any suggestions to improve future sessions?

XII. How many years of gift planning experience do you have? _____