MONOGRAPH

SUCCESSFUL FUNDRAISING CALLS: A PHONATHON SCRIPTING WORKSHOP

By
Jessica Neno Cloud, CFRE
Assistant Director for Fundraising Initiatives and Planned Giving
The University of Southern Mississippi Foundation

ACADEMIC IMPRESSIONS

FOREWORD

Some voices in higher-ed fundraising have been tempted in recent years to declare that "phonathon is dead." Certainly the phonathon operates within an increasingly challenging environment. Fewer alumni own landlines, more alumni have advanced caller ID systems, and it can be difficult to maintain an accurate database of cell numbers.

Yet, when done well, the phonathon remains the most cost-effective way to renew LYBUNT gifts and convert new donors.

In recent years, more institutions have invested in advanced automated calling systems to ensure callers get in touch with a high number of prospects and secure a high volume of gifts and pledges during each call shift. However, without effective scripting, these calls are not impactful and the return on investment could be minimal.

That's why Academic Impressions offers a series of two monographs to help you ensure that your annual fund calls are successful.

TRAINING CALLERS THROUGH SCRIPTING

Our 2011 monograph by Albert Melfo (Kent State University), offers a structured approach to training callers to respond on the fly to the ebb and flow of a conversation with a prospect. What is unique about Melfo's approach is his focus on call center scripting not just as a template but as a training tool for callers.

In Melfo's report, you will learn about:

- Tips for training and scripting the five stages of an effective call
- Tips for coaching callers to respond to concerns that prospects voice

You can learn more about Melfo's guide to call training at: http://www.academicimpressions.com/monograph/scripting-and-training-effective-fundraising-calls

A PHONATHON SCRIPTING WORKSHOP

The 2014 monograph you are currently reading offers you not only one phonathon expert's pillars for a solid solicitation call, but also a full scripting workshop. An array of institutions submitted their sample scripts to Academic Impressions and Jessica Neno Cloud (University of Southern Mississippi) for critique and revision.

In this monograph:

- Review those sample LYBUNT, SYBUNT, and future donor scripts
- Read and explore Cloud's in-depth critique of the samples
- View revisions of the sample scripts

Cloud also revises sample scripts for special donor populations, including young alumni and parent prospects. In each case, Cloud offers thorough commentary on how she revised each script to ensure callers would move through the call efficiently while still connecting with the prospect in a meaningful way and, most importantly, securing a gift.

The only resource of its kind, this monograph brings a low-cost scripting workshop directly to your office.

BONUS RESOURCES

This monograph also offers:

- A quiz for use in assessing your current scripts
- Instructions for 15 call center games
- Cloud's advice on whether to use a "permission question," whether to train callers to leave voicemail, and how to develop your annual call center calendar

PART 2: SAMPLE SCRIPTS “BEFORE” AND “AFTER”

Annual fund professionals at several institutions have graciously offered some of their phonathon scripts for critique, and in this section I provide, in each of these cases:

- Their original script (The "before" version)—*These are actual scripts collected from real colleges. Identifiers have been changed to keep their submissions anonymous.*
- Commentary on specific needs for improvement
- A rewritten script, demonstrating the points made in the commentary (The "after" script)

The objective of this exercise is to demonstrate how you can approach your own script rewrite process. The first goal should be to make sure your script meets all of the basic criteria of a sound script (detailed at the beginning of this monograph). Once you have a sound fundraising script, you can incorporate creative language and techniques to customize the scripts for different constituencies and segments. We have tried to incorporate scripts from a cross-section of institution types and a variety of segments:

- General Script from a Small Private College, "College A"
- General Script from a Small Public University, "Small Public U"
- Future Donor (Non-Donor) Script from a Small Private College, "College B"
- Donor Script from a Small Private College, "College B"
- Leadership Gift Script from a Large Public University, "Large Public U"
- Recent Graduate Script from a Small Private University, "Small University"

I hope these "before" and "after" examples will get you thinking about how you can revise your own scripting to make your phonathon effort more effective.

Before Script

FUTURE DONOR (NON-DONOR) SCRIPT FROM A SMALL PRIVATE COLEGE, "COLLEGE B"

INTRODUCTION

Hi! This is (insert your full name, first and last), calling from College B. May I please speak with (first and last name)?

"Hi Mr./Mrs./Ms./Dr. (their full name). I'm a (your year) and I'm with the College B Student Call Center. We're reaching out to alumni for a couple of reasons this evening.

BUILDING RAPPORT

One of the reasons I'm calling tonight is to gather feedback from alumni about their experience at College B.

- What do you remember most about your time at College B?
- Did you live in the residence halls?
- Who were your favorite professors?
- What types of activities were you involved with on campus?
- What are your favorite college memories?
- Have you had the chance to visit campus recently? Attend any events?
- Do you have any questions about what's happening

at College B right now?

Respond to comments and talk about some of the things happening on campus – Athletic teams, classes you are taking, new student union etc.

(See your binder for specific upcoming events to share)

TRANSITION

As you may know, the annual fund is an important part of the overall fundraising efforts of the college and your support means a great deal. Because of generous support from alumni each year, we have been able to establish more scholarships for students, add more buildings and enhancements to campus, and provide increased learning opportunities for all of our students.

Word Track: "One thing that I learned is that the annual fund has given me the opportunity to..." (Add your own personal experience here).

Each year, colleges report the percentage of alumni who give back to their alma mater to the *U.S. News* and *World Report*. All alumni who give, regardless of the amount, are counted in this percentage. The College B degree is even more valuable when the alumni giving percentage is high.

ASK

(First Ask) Can we count on your support towards reaching our goal with a gift of $100?

(Second Ask): Ok – I understand. Would you be more comfortable with a gift amount of $50?

(Third Ask) Well, ok, one thing that I would like to mention is that we're trying to encourage alumni participation, and smaller gifts really do help, because they are combined with thousands of alumni and friends like you. Many alumni really want to help, so most are still considering making a gift in the amount of $25. Would you be more comfortable with this?

FOR YES: Great! Thank you so much! Which credit card would you like to put that on? We accept Visa, MasterCard, Discover or American Express? (If they do not want to pay by credit card, we will send out a pledge form along with a return envelope in the mail within a week).

Would it be okay to be sure that we have your current contact information?

Are you still at (their address)?

Do you still work for (work info)? OR Would you like to provide us with your employment information?

Is your email address still (their email address)? OR Would you like to provide us with your email address so we can send you College B's monthly email newsletter?

Great! Thanks for helping us update your record.

ENDING
Do you know if you or your spouse's company matches charitable contributions?

Thank you once again for your support. Have a wonderful evening!

If they don't end up pledging, thank them for their time and wish them a good evening.

COMMENTARY

"NON-DONOR"

Don't use the language of "non-donor" with students. Name these segments "future donors" or "yet-to-gives". Caller psychology matters, especially with acquisition calls.

- To protect the privacy and safety of your callers, train them to introduce themselves only by their first name.
- Put verification up-front in the call. Even if they don't get to it until later in the call, this will serve as a reminder for the student about the importance of this step.
- Add a cell phone capture to your script to protect the future viability of your program.
- There are lots of good suggestions for rapport, which is great. However, you should include a note that the callers need to pick only one to two of these.
- Avoid vague language that doesn't really address impact ("means a great deal") or clichés ("make a difference").
- The transition between rapport and the first ask should be as smooth as possible, connecting the great developments at the institution to the need for more support.

"WELL, HOW ABOUT...?"

Avoid the formula of "Well-How-About." You cannot counter an objection by just saying, "Well, how about <<insert next ask level>>?" You must take the time to build the case and negotiate between each ask.

- Your leadership level sets the bar for what the institution expects in terms of giving. Not many will give at that level but it is important to raise the sights of our future donors. Consider lifting your leadership level from $100 to $250 or $500 (include language for split payments to make it seem manageable.) Some future donors haven't given because they haven't been asked—not because they can't afford it. What you ask for sets the stage for all their future giving. Starting higher also gives you more room to work in a fourth ask. All of this will raise your average gift for future donors.
- The goal for acquisition calls is always participation. That theme should be reiterated in each ask, building the case for giving something back, no matter the amount.
- Doing a "Grad Year" themed ask for the final two asks seems to jive with most new donors, particularly young alumni. So your ask string might look like this: $250 (4 payments of $62.50), $100 (4 payments of $25), $72 (for 1972 grad year), and $19.72 (for their grad year). This is a hook that works well to inspire them to make that first gift back to their alma mater.
- Always script a second credit card ask after the assumptive. It gives callers a chance to explain the importance of gifts made on credit/debit cards.

- Don't use the passive/permission-seeking language when trying to capture address info. Use "Is your address still…?" rather than "Would it be okay to update…?"
- Make sure you are reiterating the commitment and the commitment amount during the close of the call. Also, be sure to script the callers to go over time of payment and next steps during the end of the call.
- Do not ask prospects if they work for a matching gift company. They will almost never know what a matching gift company is, much less whether or not they work for one. Have the callers capture/verify their employment and then look up that employer in the database or brochure during the call. Then explain to donors what a matching gift program is and how it works.