

PHONATHON ESSENTIALS: SCRIPTING CALLS, HIRING CALLERS

September 14 & 16, 2010 :: 1:00 – 2:45 p.m. EDT



ACADEMIC · IMPRESSIONS

WEB CONFERENCE

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OVERVIEW

Despite predictions to the contrary, phone solicitation remains a strong method of achieving quality alumni contacts at a relatively low cost-per-dollar rate. However, even experienced phonathon programs face challenges with keeping their calls fresh and recruiting the right callers.

Join us online for a two session webcast designed help you amplify your phonathon returns. You will learn:

- What makes a call structure successful
- How to create a custom calling script that suits your institution's needs and goals
- Best practices of call contact
- Tactics for recruiting your callers
- A formula for identifying and hiring the most effective callers
- Guidelines for training and engaging your callers

WHO SHOULD ATTEND

Advancement professionals and managers charged with increasing their phone program's impact will learn the key components to building a more prosperous and efficient phonathon campaign that better meets shop goals and institutional needs.

PROGRAM AGENDA

SESSION 1: Structuring/Scripting a Successful Phonathon Call

TUESDAY, SEPTEMBER 14, 2010

1:00 – 2:45 p.m. EDT

- Scripting vs. process
- Elements and techniques for an effective call
 - Introduction
 - Engagement
 - Case for giving
 - Negotiation
 - Formal close
- Language for overcoming objections
- Role Plays
 - The too-busy alum
 - The tuition-punchy alum
 - The committed-elsewhere alum
- Assessment measures

SESSION 2: Hiring, Training and Managing Effective Callers

THURSDAY, SEPTEMBER 16, 2010

1:00 – 2:45 p.m. EDT

- Knowing and motivating the Millennial cadre
- Recruiting your callers
 - Sample job descriptions
 - Marketing the job
 - Application form necessities
- Selecting your callers
 - Key differentiators
 - Measuring personalities
 - Interview process keys

Learn key
tactics for
hiring the
right callers
and making
their calls
effective.



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SESSION 2: Hiring, Training and Managing Effective Callers

THURSDAY, SEPTEMBER 16, 2010 (CONTINUED)

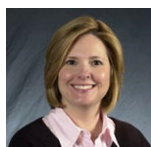
- Training your callers
 - The impact of philanthropy
 - Call training
 - Setting clear expectations
- Managing your callers
 - Monitoring calls
 - Assessment measures
 - Disciplinary options
 - Keeping callers engaged

INSTRUCTORS



Albert Melfo, Director of Annual Giving, Kent State University (Session 1)

Albert has over 20 years of non-profit management experience, and is nationally recognized as an expert in annual giving program management and tele-fundraising. For the past 9 years, he has held his current role at Kent State, where he oversees a staff of six professionals who are responsible for the central development annual giving program, including direct mail, telemarketing, electronic marketing, leadership, student and young alumni giving and social media. Prior to Kent State, Melfo spent 7 years at the University of Pittsburgh, where he managed the conversion of the PittTeleFund from a manual to an automated environment and established it as one of the top performing higher-education phone centers in the nation. Before his career in higher-education, Albert managed fundraising, subscription sales and membership marketing campaigns for a variety of non-profit performing and visual arts organizations based in Pittsburgh, PA.



Beth Braxton, Director, Director of Annual Giving, UNC-Chapel Hill (Session 2)

Beth Braxton has more than 18 years of experience in development. She has been in her current position as director of annual giving at The University of North Carolina at Chapel Hill for more than six years where she has been responsible for coordinating the central development annual giving program including direct mail, e-solicitations, phonathon, leadership giving, student, young alumni and diversity initiatives as well as social media. Prior to accepting her current role she served in a variety of positions at Carolina, including assistant dean for development and alumni affairs at the UNC School of Journalism and Mass Communication and director of major gifts at UNC's Kenan-Flagler Business School.

UNC's central office annual fund has seen an increase of 40% in dollars since fiscal year 2004. UNC has also increased overall alumni donors by more than 10% in the past three fiscal years. Before returning to UNC, Beth was a fund raiser for community hospitals in North Carolina.

LOGGING IN TO THE WEBCAST

After registration, each registrant will receive a confirmation of payment or an invoice, depending on method of payment. Each registrant will also receive an email with appropriate login information and more information regarding the event a few days prior to the start of the event. The day of the conference, you will receive another email with the same information. To participate, you will need a computer with a high speed internet connection. You will have the option to receive audio via your computer speakers or telephone.

WHAT IS A SINGLE SITE CONNECTION?

A site connection allows a single connection to the web conferencing software and teleconference. We encourage you to set the event up in a conference room or classroom from a single computer in order to allow multiple stakeholders from your campus to participate. Remember, as long as only a single computer connects, you can bring as many people as you want to the event. Because there are no travel expenses and only a single registration fee is required, each additional participant lowers the cost per person significantly. Purchasing a site connection and inviting everyone involved in a particular topic is a great way to provide cost-effective professional development. Please note that you will have the option to receive audio via your computer speakers or telephone.

If for any reason a relevant stakeholder cannot co-locate for the session, we encourage you to include that person by purchasing an additional connection at the reduced fee of \$195 per session. This will ensure that every member of a team receives the same relevant, timely information in the most efficient way. If an interested party cannot participate at the designated time, or if someone would like to view the presentation again, an archived copy of the event will be available for 60 days. If you have any technical or purchasing questions, please contact us at 720.488.6800.



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REGISTRATION FORM

Make the most of the presentation: invite your whole team to participate from a single location at no additional cost. Questions about the event? Call us at 720.488.6800 to help determine if this event is right for you. Register online at www.academicimpressions.com

REGISTRATION FEES

Postmarked on or before September 7, 2010

- Both Sessions (BEST VALUE) _____ \$650.00 USD
 One Session Only Session One Session Two _____ \$350.00 USD

Additional Site Connections: Phonathon Essentials: Scripting Calls, Hiring Callers _____ \$195.00 per session
Session One, Quantity: _____ Session Two, Quantity: _____
(After September 7, 2010 an additional \$75.00 fee for the first connection and \$50.00 fee for each additional connection applies)

- Registrants receive a 50% discount on a CD recording of all sessions in this event. Please send me the CD _____ \$325.00 USD
 Can't attend the live sessions? Please send me a CD recording of this webcast _____ \$650.00 USD

Total amount enclosed or to be charged: \$ _____

How did you hear about this event? (email from AI, colleague forwarded email, *The Chronicle*, etc.) _____

WEB CONFERENCE REGISTRATION INFORMATION (PLEASE PRINT CLEARLY)

Name _____ Job Title _____
Institution/Organization _____ Address _____
City _____ State/Province _____ Zip/Postal Code _____ Country _____
Telephone _____ Fax _____ Email _____

(Additional contact information for registration confirmations and pre-conference communication.)

Additional Contact Name _____ Additional Contact Phone _____
Additional Contact Title _____ Additional Contact Email _____

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We accept Visa, MC, and AmEx credit cards. To pay by check, include the check with this form or select the "invoice me" option. Fax form to 303.741.0849 or mail form along with payment to: Academic Impressions, 4643 S. Ulster St. Ste. 350, Denver, CO 80237.

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Refunds will be issued only if cancellations are received in writing by July 9, 2010. A \$75 processing fee will be assessed. After July 9, 2010 a credit (less \$75 processing fee) will be issued. The credit will be valid for 12 months and can be used toward any future conferences, web conferences, audio proceedings, or web conference archives. In case this event is cancelled, Academic Impressions' liability is limited to a refund of this registration fee only.

