

# the anatomy of a phone solicitation

1. PREPARATION
  - a. Know you as a person: Why do you give? Lead by example. Be prepared to share.
  - b. Know this individual prospect: Review her pledge card and her giving history.
  - c. Know the product: Your Federation, pertinent materials and case for giving.
  - d. Know the process: Here we go!
  
2. OPENING
  - a. Smile: Identify yourself as a volunteer for Federation.
  - b. Be upbeat, enthusiastic, personal and positive.
  - c. Flatter (“I wanted to talk to you because you are so caring and generous, because you find it in your heart each year to give a little more, because I wanted to tell you how much we appreciate your gift each year.”)
  
3. PRESENTATION
  - a. Find the connection: common values and interests.
  - b. Create conversation with open-ended questions (how, why and what).
  
4. ASK
  - a. Would you consider an increase of \$200, less than \$4 per week?
  - b. After the ask, remain silent.
  
5. NEGOTIATIONS/OBJECTIONS
  - a. 3 F’s: Feel, Felt, Found
  - b. “I am happy that you brought that up...”
  - c. ABC: Always Be Closing. “And that’s why I’m asking if you would consider a gift of...”
  
6. CLOSE
  - a. Thank them for the gift.
  - b. If the gift is not closed, offer to call back at a mutually convenient time.

# favorite picks

**“It’s not how much you know, it’s how much you care.”**

1. A **solicitation** is really \_\_\_\_\_.
2. **Favorite Opening** (Hint: flatter!)  
Example: “Linda, I wanted to call you for the Federation this year because you always seem to find it your heart to give a little more. Thank you.”
3. **Favorite Presentation** (Hint: open-ended questions)  
Any question starting with “How?” “What?” “Why?”  
Example: “Linda, what impresses you about this Jewish community of ours?”
4. **Favorite Ask** (Hint: consider an increase)  
Example: Linda, on behalf of our community, would you consider an increase of \$100, less than \$2 a week?
5. **Favorite Negotiation** (Hint: 3 F’s)  
Example: Linda, I know how you feel. I also felt \_\_\_\_\_, yet I have found\_\_\_\_\_.
6. **Favorite Close** (Hint: thank from the heart)  
Example: Linda, I cannot tell you how many lives will be touched by your beautiful gift. On behalf of them and our community, thank you so much.

# objections

## a natural and positive part of a Jewish conversation or solicitation

An objection can mean several things:

1. A request for more information.
2. This issue must be important to the prospect.
3. The prospect is paying attention.
4. An opportunity to further the conversation, i.e. the connection
5. The objections can be turned into opportunities to educate, explain, communicate or motivate further.
6. Further reassurance that he/she is doing the right thing.

Your goal is to expect objections and turn them into reasons to give.

**You cannot overcome objections.** That is an oxymoron. You can acknowledge, validate and relate, but not argue or overcome an objection.

**Your best weapon is to listen.** You will find indicators or personal interests in helping you close the gift.

**EXPECT objections.** They are a natural, predictable and positive component of the solicitation.

**RESPOND with focused goals in mind,** which are that the prospect feels good about the Jewish conversation, about the Jewish Federation work and about giving the gift.

### **RESPONSES to objections that work:**

- 1) "I am happy that you brought that up..."
- 2) "You know, I never thought of it that way. However..."
- 3) "What some women on the Board are doing..."
- 4) "It is a suggestion to everyone to give a fair share of the community goal based on the community needs."
- 5) 3 F's: "I know how you feel...I have felt that way myself...Yet I have found..."

**In Summary:** Agree, validate, empathize, connect further and then give a clear, succinct and sound explanation. Answer the objection with one of the 5 responses above and then return to the focused goals.

**Remember:** "No" today may be "Yes!" tomorrow, or "Yes" to future interest and involvement. It is a win/win just by having the Jewish conversation!

# open-ended questions

- You've been a terrific supporter. Why?
- How did you first get involved/make your first gift?
- What has been the most rewarding part of your involvement with Federation? What do you value most about Federation? Its work? Your involvement?
- What would you like to accomplish with your philanthropy?
- How could Federation improve its solicitation process? Make giving more enjoyable? Provide meaningful donor recognition?
- In what other Jewish or civic activities are you involved?
- To which Federation-supported programs have you or your family ever been exposed?
- Tell me about your family. Where do your children go to school? Where do your children live? What Jewish activities do they enjoy?
- What direction would you like to see the Federation take in terms of outreach? Funding?
- What is your vision for our future Jewish community?