



Successful Volunteer-Led Phonathons

SustainAbility

HANDBOOK



SUCCESSFUL PHONATHONS IN *11 EASY STEPS*

**Raise funds by phone:
Plan your event
Train your volunteers
Get great results**



SPONSORED BY:

Corporation for
**NATIONAL &
COMMUNITY
SERVICE** 
www.cns.gov



PROVIDED BY:



© 2005

Campaign Consultation, Inc.

All rights Reserved

Campaign Consultation, Inc. grants permission for photocopying, for limited or internal use, by participants of training events provided by Campaign Consultation. This consent does not extend to other kinds of copying for general distribution, for advertising or promotional purposes, for creating new collective works for resale. Requests for permission or further information should be addressed in written form to:

Director of Operations
Campaign Consultation, Inc.
2819 Saint Paul Street
Baltimore, Maryland 21218-4312 USA
T. 410.243.7979 F. 410.243.1024
Success@CampaignConsultation.com
www.CampaignConsultation.com

A volunteer-led phonathon is simple:

Think of it as “*friends calling friends for help.*” We do it all the time—pick up the phone and ask for a favor. What could be more natural? But,

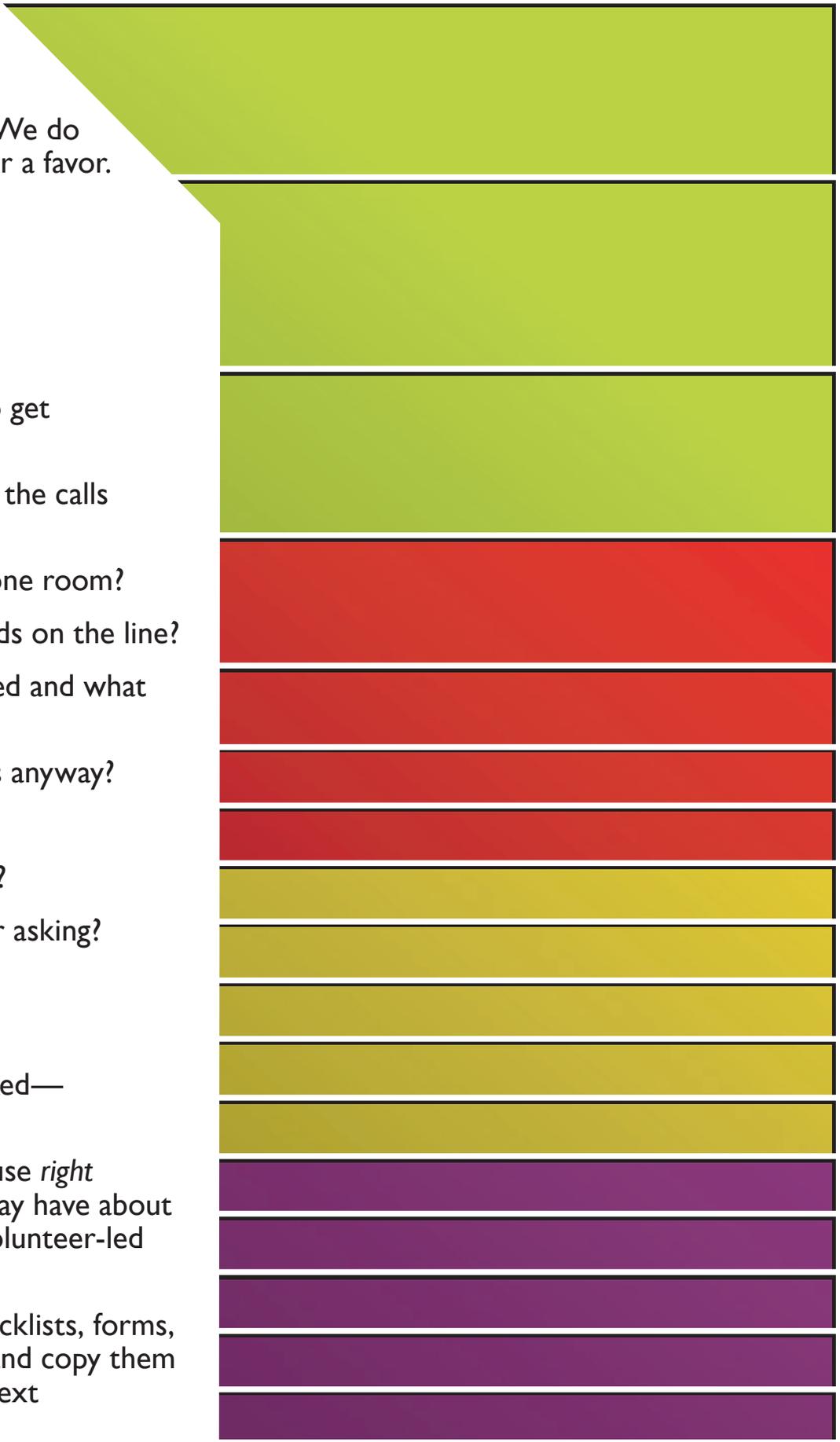
- Who should we call?
- And what are we asking them for?
- How *much* help do we need?
- How many friends do we have to call to get that help?
- How many people do we need to make the calls all in one night?
- Where are there a lot of phones all in one room?
- What will we say once we get our friends on the line?
- How can we keep track of who we called and what they said?
- When’s the best time to call our friends anyway?
- Who’s going to organize all this?
- How can we make it *fun* to ask for help?
- Might some friends be annoyed at us for asking?

Answers to your phonathon questions:

The phone is an excellent—and overlooked—fundraising tool.

This hands-on handbook is designed for use *right now* by answering all the questions you may have about planning and implementing a successful volunteer-led fundraising phonathon.

It comes complete with ready-to-use checklists, forms, samples and other tools, too. Go ahead and copy them to get started. And begin planning your next phonathon today.



STEP ONE

INTEGRATE!

How can a
phonathon help us
raise funds and friends?



ACTIONS!

Integrate with your current annual campaign

Your volunteer-led phonathon is a fundraising special event, so work it into your fundraising cycle in the same way you would any other event: for maximum impact and results. A phonathon is best used to support a campaign you already have in place, especially your annual giving campaign, since it's an ideal “mop-up” tool.

Integrate with important calendars

Timing is critical to the success of your phonathon. It should fit in with your organization's calendar, of course, but also your *volunteers' and donors' calendars* because they're the ones who will make your phonathon a success.

Early spring is good. Holidays, extended weekends and other dates when donors may be unavailable are not. It helps to announce your phonathon on your website and in your newsletters too, to give donors a heads-up for their *own* calendars.

How can a phonathon help us raise funds and friends?

• Integrate with your philosophy

If your board members, staff or volunteers resist the idea of a phonathon for “telemarketing” reasons, assure them that your phonathon will *enhance* your organization and its mission.

That’s because your volunteer callers will:

- Perform in a professional manner (you’ll train them)
- Treat your donors as valued friends
- Thank your donors graciously for their past support
- Call only during acceptable times
- Always ask permission to start the “dialogue.”





CONSIDER THIS...



Need more good reasons to have a phonathon?

Copy and distribute the “25 Benefits: Phonathons Raise Funds and More” fact sheet to your board members, staff, volunteer leadership and stakeholders. They’ll soon agree that a volunteer-led fundraising phonathon is worth the time and effort.



Tools:

Use the following
Tools to help you achieve your
Successful Volunteer-led Phonathon:

- ▶ 25 Benefits: Phonathons Raise Funds and More

1

25 Benefits: Phonathons Raise Funds and More (p.1)

Expect positive results—you'll likely get even more than you anticipate!

Fundraising. Your initiative...

- 1) ... enjoys the short-term benefits of a fully integrated Annual Campaign.
- 2) ... makes the best possible use of your direct mail campaign investment.
- 3) ... puts to use one of the best tools for upgrading your current donors.
- 4) ... puts to use one of the best tools for reinstating recently-lapsed donors.
- 5) ... enjoys the long-term benefits of strengthened relationships between your staff and volunteers.
- 6) ... enjoys the long-term benefits of strengthened relationships among your volunteers.
- 7) ... provides your donors with a more personal asking approach that can significantly boost response to your mail campaign.
- 8) ... creates opportunities to appeal for activism or other kinds of support.
- 9) ... gathers and updates donor information.

Volunteer Development. Your volunteers...

- 10) ... become engaged with your organization in a new and interesting way.
- 11) ... learn more about your program's history and mission, and become comfortable telling your organization's story.



COPY ME

25 Benefits: Phonathons Raise Funds and More (p.2)

1

- 12) ... get to personally reach out and touch large numbers of other people (donors) who care about your organization.
- 13) ... get to share information about your organization that your donors may not know.
- 14) ... learn from your donors, too.
- 15) ... develop stronger relationships with one another.
- 16) ... become more committed to your organization and better donors themselves.
- 17) ... get to have a fun and enjoyable evening filled with camaraderie.

Donor Development. **Your donors...**

- 18) ... get to speak personally to a representative from your organization.
- 19) ... can ask questions about your programs.
- 20) ... can offer valuable feedback about their impressions of your organization.
- 21) ... develop a better understanding and appreciation of how their gifts are used—which encourages them to give more.
- 22) ... feel appreciated, because the volunteer caller tells them they are.
- 23) ...develop a better understanding of their importance to your organization.
- 24) ... increase their level of involvement because of the personal contact and appreciation.
- 25) ... reinstate their involvement if their commitment has lapsed.





STEP ONE

Overview:

ACTIONS!

- ✿ Integrate with your current annual campaign
- ✿ Integrate with important calendars
- ✿ Integrate with your philosophy

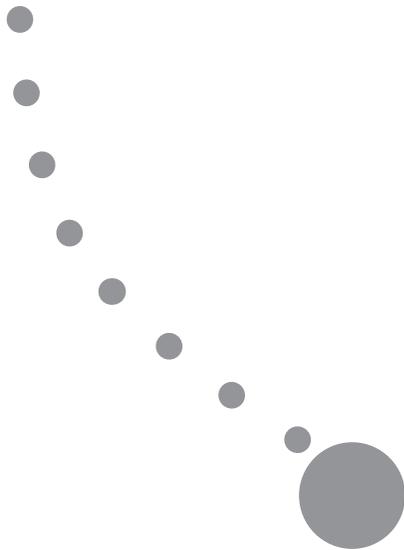
CONSIDER THIS...

- ✿ Need more good reasons to have a phonathon?

TOOLS

- ▶ 25 Benefits: Phonathons Raise Funds and More

Review
the Step



Ready for the
Next Step?



1 STEP ONE

STEP TWO

IDENTIFY PROSPECTS and REASONS

Who is most likely
to give us gifts over the
phone—and why?



ACTIONS!

Call the people you know—and who know you

Volunteer-led phonathons should focus on your current and past friends.

Hopefully you've been diligent in keeping your files updated so you have accurate names, addresses, phone numbers and email addresses. You should also know when your friends have given to you in the past, and how much. Knowing why they've given is helpful, too.

The more details you know about your donors, the more you can “segment” your donor list. And figure out who best to call and for what reason.

Who is most likely to give us gifts over the phone—and why?

Identify a sound, urgent reason

Why you're calling is as important as who you're calling. Are you calling donors who didn't respond to your direct mail package? Are you starting a new giving circle or a program? Are you closing out your fiscal year or following up on an invitation to a special event? Are you raising funds for a special purchase?

A compelling, interesting reason—one your chosen donor segment might respond to instinctively—is key.



CONSIDER THIS...



The “Budget Shortfall” Reason: Compelling, yet problematic

If you're truly behind the eight ball, a phonathon could help pull you out. But if you call for this reason more than once, you'll damage your organization's credibility.



SUCCESS STRATEGY: Navigating the “Do Not Call” list

Recent studies show that some donors are confused by the national “Do Not Call” list, while most understand that nonprofit organizations are exempt. When your callers identify themselves *immediately* as “volunteers from your initiative” and ask *permission* to continue, donors usually welcome the contact.





STEP TWO

Overview:

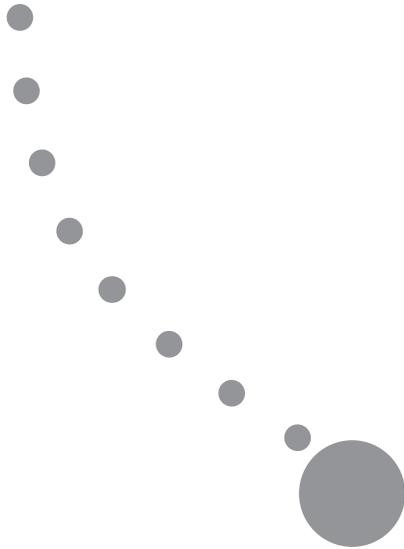
ACTIONS!

- 📞 Call the people you know—and who know you
- 📍 Identify a sound, urgent reason

CONSIDER THIS...

- 📝 The “Budget Shortfall” Reason: Compelling, yet problematic
- 📌 SUCCESS STRATEGY: Navigating the “Do Not Call” list

Review the Step



Ready for the
Next Step?



2

STEP TWO

STEP THREE

SET GOALS

**How much do we want our phonathon to raise?
And what's the smartest way to go about raising it?**



ACTIONS!

Set a challenging yet achievable fundraising goal

If you're facing an urgent need with a set amount of required funds, the goal sets itself. If you're integrating your phonathon with another component of your fundraising, the goal can be in dollars, in response rate (such as boosting response to your annual giving campaign) or in the number of pledges or upgrades.

Determine the number of volunteer callers you need

The more prospects you want to call, the more volunteer callers you'll need. Well-trained, well-equipped volunteers can call about 25 donors an hour. And they can typically stay fresh and be willing to donate *two hours of calling*.

This means you should plan on scheduling one volunteer for every 50 names on your prospect list.

How much do we want our phonathon to raise? And what's the smartest way to go about raising it?

And since it typically takes seven calls to get a pledge commitment, you'll get about seven commitments per volunteer. So if you need 50 pledges to meet your fundraising goal, you'll need to recruit seven volunteer callers. *Plus another two because on average 25% cancel for personal emergencies, illness or other reasons.*

● Plan your budget

Your phonathon committee members (defined in the next step) will work hard to find businesses to donate a site, extra phones to use, refreshments and awards. But be prepared to pay for some of these expenses out of pocket, just in case. Other costs include training and support materials for your callers, postage for your pre-call letter and pledge cards, and costs related to staff time.

● Work out a realistic timeline

Allow three to six months to organize your phonathon. Plan for a single evening of calling, and possibly a second evening, if necessary.





CONSIDER THIS...



SUCCESS STRATEGY:

In-house testing

Get a few staff and volunteers together for an informal phonathon test. Call a portion of your donor segment and try out your approach. If you get the results you want, you're set to go. If not, make adjustments and test again.



Are we ready?

It takes time, money and patience to organize phonathons. The “Readiness Checklist” should help you and your volunteer leadership determine if you have enough in place to get started. Meet with core fundraising volunteers and ask them to check off their answers—then discuss the results. It is critical that key volunteers go through this process to ensure “buy-in” from everyone.



Tools:

Use the following
Tools to help you achieve your
Successful Volunteer-led Phonathon:

▶ Readiness Checklist

3

Readiness Checklist (p.1)

Do you have enough in place right now to start planning your phonathon?

- Enough board/staff members to coordinate the effort.

Yes

No

Possible

Not Possible

- Enough volunteers to place the calls and fill supporting roles.

Yes

No

Possible

Not Possible

- Accurate and complete prospect information, including phone numbers.

Yes

No

Possible

Not Possible

- Accurate and complete prospect giving history.

Yes

No

Possible

Not Possible

- Ability to target our appeal to our prospects based on their giving history.

Yes

No

Possible

Not Possible



- Ability to develop a good reason to hold a phonathon (such as annual campaign mop-up, specific community need or program response, recent accomplishment, etc.).

Yes

No

Possible

Not Possible

- Knowledge of when other phonathons are taking place so ours does not conflict.

Yes

No

Possible

Not Possible

- Three to six months time to plan and organize the phonathon.

Yes

No

Possible

Not Possible

- Personal connections to vendors and stakeholders who will want to contribute location, phones, food and incentive or recognition awards.

Yes

No

Possible

Not Possible





STEP THREE

Overview:

ACTIONS!

- Set a challenging yet achievable fundraising goal
- Determine the number of volunteer callers you need
- Plan your budget
- Work out a realistic timeline

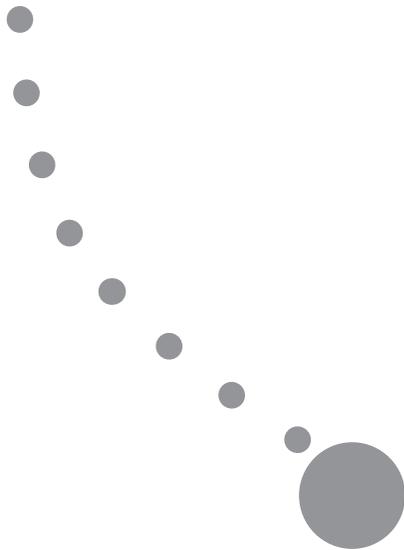
CONSIDER THIS...

- SUCCESS STRATEGY:**
In-house testing
- Are we ready?

TOOLS

- Readiness Checklist

Review the Step



Ready for the
Next Step?



3
STEP THREE

STEP FOUR

RECRUIT LEADERSHIP and CALLERS

Who will make the calls?
Who will help them succeed?



ACTIONS!

Phonathon leadership

You need a core group of board members, staff and volunteers to form a committee—then plan, organize and coordinate your phonathon effort. Committee members should be energetic, enthusiastic, reliable and of course, committed to the phonathon goal. They'll need to:

- Attend pre-phonathon planning meetings
- Help secure a site
- Recruit volunteer callers
- Solicit donations for food and awards
- Attend and participate in the phonathon
- Contribute financially to the fundraising effort

Use the “Team Building Worksheet” to keep track of who’s doing what.

Who will make the calls? Who will help them succeed?

Phonathon team members

Volunteer Chairperson/Team Leader: Lends his or her name to the effort and helps engage and motivate volunteer callers.

Volunteer Callers: Call and ask (and thank) prospects, fill out pledge forms and update donor information on calling card.

Answer Person: Usually a long-term or senior staff person who is ready and able to answer prospect/supporter in-depth questions.

Cheerleaders: Keep spirits high by keeping callers motivated, refreshed and happy!

Runners: Organize completed pledge forms into piles, including: completed/ready for mailing, no answer—sorry I missed you, call back, refused and bad number.

Phone Number Checker: Quickly checks computer records, phone books, directory assistance or internet directories for erroneous numbers that “slip through.”

Tally Keeper: Records progress of goals on a large visible board or other visual device, like a thermometer.

Mailer/Processor: Separates pledge forms for mailing, runs credit card forms, and mails at the conclusion of the evening (or the following day).

Overcoming volunteer apprehensions

Not every volunteer you contact will jump at the chance to call people they don't know. To help them along, focus on the reason you're having the phonathon and mention any respected peers that are participating. Also make sure they know they'll be given *everything* they need to be successful, including training.





CONSIDER THIS...

SUCCESS STRATEGY: **Calling Teams**

Consider creating calling “teams” to motivate your volunteer callers and build camaraderie. Get creative with the team names. Seat the team members next to each other. Keep track of team progress on your tally board. This strategy may also help with your volunteer recruiting efforts—volunteers can nominate their friends to join their team.



Tools:

Use the following
Tools to help you achieve your
Successful Volunteer-led Phonathon:

- ▶ Team Building Worksheet

A winning team is made up of staff, leadership volunteers, volunteers with specific roles and volunteer callers. When everyone understands their unique roles and works together, your volunteer-led phonathon will be successful and enjoyable.

Use the following worksheet to identify your leaders and team members. And remember to schedule at least 25% more volunteer callers than you actually need to allow for illness, personal emergencies and other scheduling conflicts that may come up.

ROLE	TEAM MEMBER
Volunteer Chairperson	
Phonathon Committee	
Cheerleader	
Tally Keeper	
Runners	
Mailer/Processor	
Answer Person	
Phone Number Checker	
Volunteer Callers	



STEP FOUR

Overview:

ACTIONS!

- Phonathon leadership
- Phonathon team members
- Overcoming volunteer apprehensions

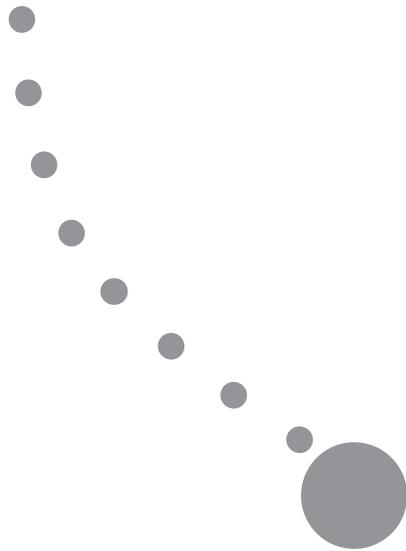
CONSIDER THIS...

- SUCCESS STRATEGY:**
Calling Teams

TOOLS

- Team Building Worksheet

Review the Step



Ready for the
Next Step?



STEP FOUR

STEP FIVE

SECURE “HARDWARE”

Who will donate the space and supplies?



ACTIONS!

Choose an appropriate site

You'll create a “team” environment for your volunteer callers—and inspire them to do their best—if they're all together in one place, a place where they can see each other and also share in each other's successes. Plus, it's easier to supervise and support them if they're all together.

Large conference rooms that have a lot of phones or phone outlets are ideal. Look for banks, large law firms and other facilities that, during the day, bring people together in one place to conduct business.

Your board members, staff and leadership volunteers probably have connections to such businesses—now's the time to ask for their support by loaning you their space for a few hours. Assure them that you'll be considerate borrowers, and arrange for clean-up and custodial services well in advance.

One caveat: make sure the caller ID that comes up on your donors' phones is a positive one—or not a negative one.

Who will donate the space and supplies?

Secure enough phones

If you're having trouble finding a large room that also has a lot of phone access, get creative! Callers can trade off in shifts, for example, or you can spread the calls out over more than one night.

Cell phones are an excellent alternative. Volunteers can use their own phones, or you can ask a cellular carrier to donate phones for the evening. If your budget allows, and if you plan to make phonathons part of your permanent fundraising mix, consider buying prepaid cell phones—you can often find them for a surprisingly low price.

Remember to fully charge phone batteries before you start calling!

Provide food and refreshments

Callers will do a better job if they're comfortable. Provide a light meal before calling begins, especially if your callers will be coming straight from work. Also have snacks, coffee and other beverages to restore their energy as the evening progresses. Dessert afterward is also appreciated! Look to local restaurants, caterers and grocery stores for donations.

🔴 Motivate—and appreciate—your volunteers

To keep your callers enthused, you'll need a tally board to be updated throughout the evening—a big wipe-off board works well. Or you can use another tracking device, like a big thermometer or arrow pointing toward your goal.

You'll need to show your appreciation in a tangible (and public) way, too. Think of appropriate gifts for your phonathon volunteers and find donors who would appreciate visibility in your publications.





CONSIDER THIS...

Do you have all the tools in place?

The “Hardware Checklist” helps you keep track of your progress. Check the first box once you’ve arranged for an item, and the second box after you’ve confirmed it a few days before your phonathon.



Tools:

Use the following
Tools to help you achieve your
Successful Volunteer-led Phonathon:

▶ Hardware Checklist

You need four types of “things” unrelated to your volunteers and prospect list to make your phonathon a success: an appropriate site, enough phones, nourishment and incentives and awards.

Use the following checklist to keep track of what you’ve arranged and *confirmed*.

Site

- Large conference room with a lot of phones or phone outlets
 - Arranged Confirmed
- Comfortable seating
 - Arranged Confirmed
- Good satellite reception for cell phone use
 - Arranged Confirmed
- Good lighting
 - Arranged Confirmed
- Adequate parking
 - Arranged Confirmed
- Safe parking (or escorts, if calling ends at night)
 - Arranged Confirmed
- Easy access to the facility
 - Arranged Confirmed
- Clean-up arrangements
 - Arranged Confirmed

Phones

- Enough phones at site
 - Arranged Confirmed
- Positive (or neutral) caller ID
 - Arranged Confirmed
- Cell-phone loaner option
 - Arranged Confirmed
- Cell-phone back-ups
 - Arranged Confirmed
- Cell phones receive good satellite reception at site
 - Arranged Confirmed



Food and Refreshments

- Donated meal
 - Arranged
 - Confirmed
- Meal delivery or pick-up scheduled
 - Arranged
 - Confirmed
- Donated coffee and other beverages
 - Arranged
 - Confirmed
- Beverage delivery or pick-up scheduled
 - Arranged
 - Confirmed
- Donated dessert or snacks
 - Arranged
 - Confirmed
- Dessert delivery or pick-up scheduled
 - Arranged
 - Confirmed

Incentives and Awards

- Large wipe-off board or other tally board
 - Arranged
 - Confirmed
- Motivating devices (thermometer, bell, etc.)
 - Arranged
 - Confirmed
- Gifts for committee members
(such as donated gift certificates)
 - Arranged
 - Confirmed
- Awards for volunteer callers
(such as donated items or Certificates of Appreciation)
 - Arranged
 - Confirmed



STEP FIVE

Overview:

ACTIONS!

- Choose an appropriate site
- Secure enough phones
- Provide food and refreshments
- Motivate—and appreciate—your volunteers

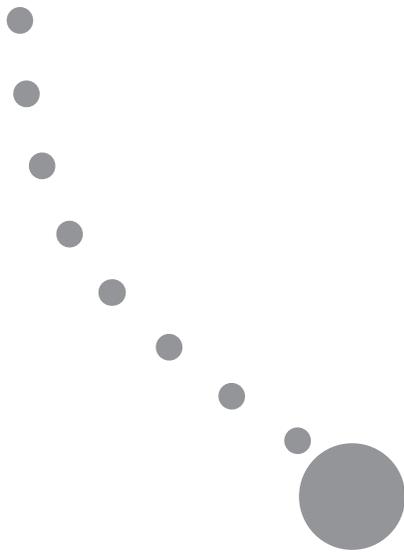
CONSIDER THIS...

- Do you have all the tools in place?

TOOLS

- ▶ Hardware Checklist

Review the Step



Ready for the
Next Step?

5

STEP FIVE

STEP SIX

MAKE CALLING CARDS and PLEDGE CARDS

Who, exactly, are we going to ask?
And how will we track
their responses?



ACTIONS!

Calling Cards: Empower your callers with accurate, complete information

You want to create a “calling card” for each of the prospects your volunteer callers will be contacting during your phonathon.

In addition to names and phone numbers, calling cards should include an accurate giving history (dates and amounts) for your callers to reference and for you to determine gift suggestions.

Current street and email addresses should be included so your callers can verify and update this important information. They can simply make corrections and notations right on the card to be entered into your database later.

Some fundraising software programs provide calling card templates, but it’s relatively simple to create your own using your existing database (see the “Sample Calling Card”).

Who, exactly, are we going to ask? And how will we track their responses?

Pledge cards: Streamline the pledge process

You'll also need to give your callers a "pledge card" that corresponds with each calling card. The pledge card includes a brief summary of your case and the donor's name, address, pledge amount and payment method. And a big "thank you," too!

Callers complete a pledge card after each successful call so it can be mailed immediately to the donor for confirmation (see the "Sample Pledge Card"). If a donor's personal information has changed, the pledge card will also need to be updated before mailing.

Pledge follow-up system

You need a great pledge follow-up plan to make your phonathon a success. Set up your donor database to track who pledged what, who followed through and who needs reminding.

You'll want to run credit cards and mail pledge cards right away—on Phonathon Night or the day after—to get the system going. Make sure you have a plan to send reminder letters at 30, 60 and 90 days, and to send thank-you letters within two days of receiving payment.



CONSIDER THIS...



Segmenting your calling cards

You'll want to give your best prospects to your best callers, but you'll also want to make sure that each caller has some "sure things" in their stack of calling cards. Other ways to segment: by geography, recent giving history, gift levels, and lapsed, brand-new, or other donor differentiations.



Tools:

Use the following
Tools to help you achieve your
Successful Volunteer-led Phonathon:

- ▶ Sample Calling Card
- ▶ Sample Pledge Card

Make a "Calling Card" template like the one below to give your volunteer callers the information they need to be successful. Make sure to allow enough space for changes and notes.

Phonathon Calling Card

Contact Information

(Please verify and make changes, if needed.)

Donor First and Last Name:

Salutation:

Address 1:

Address 2:

City, State, ZIP:

Phone:

Fax:

Email:

Giving History

Last Gift Amount:

Last Gift Date:

Campaign Participation:

Suggested Phonathon Gift:



Call Record

Specific Pledge Given: \$

- Undecided: Send Blank Pledge Form
- Undecided: Call Again
- Has Questions: Call with Answer
- Already Gave
- Refused

Volunteer Caller Information and Comments

Caller Name:

Call Date:

Call Time:

Your comments about this call or donor:

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

6

Sample Pledge Card

Make a "Pledge Card" template like the one below for your volunteers to fill out after they complete successful calls.

Thank you for your pledge!

Your pledge will help <Insert a brief case summary, including main benefits> and other vital services.

Your Organization Name

Your Street Address

Your Phone and Web Address

Your Campaign Name

Your Specific Program Name (if applicable)

Your Phone and Web Address

Donor First and Last Name:

.....

Verified Street Address:

.....
.....

City, State, ZIP:

.....

Pledge Amount: \$

.....

Pledge Date:

.....

Paid by: Visa MC AmEx

Check Enclosed for \$

.....

Thank you so much for talking with me during <Insert Your Organization or Program Name> calling campaign.

Your gift makes a significant impact!

<Your Program Name> Volunteer Signature



COPY ME

STEP SIX

Overview:

ACTIONS!

- Calling Cards: Empower your callers with accurate, complete information
- Pledge cards: Streamline the pledge process
- Pledge follow-up system

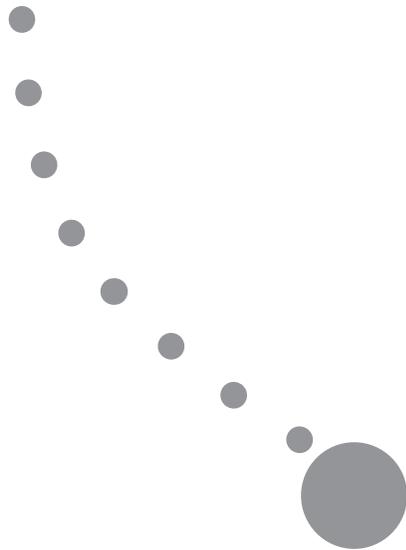
CONSIDER THIS...

- Segmenting your calling cards

TOOLS

- ▶ Sample Calling Card
- ▶ Sample Pledge Card

Review the Step



Ready for the
Next Step?

6

STEP SIX

STEP SEVEN

WRITE THE “DIALOGUE”

What should our callers say?



ACTIONS!

◆ Write a “dialogue” rather than a “script”

A “script” is a one-sided speech that you memorize and repeat—not an effective phonathon technique. A “dialogue,” on the other hand, is the foundation of a conversation, a give-and-take between two people—a very effective phonathon technique.

Use the format below (and the “Sample Dialogue”) to create a winning dialogue for your callers.

◆ Part One: The opening

After asking if the prospect is available, your caller should introduce himself or herself *right away* by first and last name and as a volunteer for your organization.

Next—and this is important—the caller should ask permission to continue. If it’s given...

...say thank you!

(Say thank you even if the prospect can’t talk right now—this person is a valued friend and should be thanked for past support.)

What should our callers say?

Part Two: The reason for calling

Your caller should briefly explain that a group of volunteers have gotten together for your urgent, compelling reason. This is where the caller makes your case for support, and where the passion comes through.

Part Three: The ask

The caller makes a clear and direct ask for a specific amount of money. After asking, your caller needs to be quiet to give the prospect a few moments to consider the request. Then if your caller senses a “no” coming, he or she should find out if the donor has any questions, or reduce the amount of the gift request.

If the donor is still undecided (which can still mean “yes”), offer to send a blank pledge card that can be filled in later. Whatever the answer...

... say thank you!

Part Four: The confirmation

Take a moment now to go over the calling card information—name, address, email—to make sure everything is correct. And most importantly...

... say thank you one last time!





CONSIDER THIS...



SUCCESS STRATEGY:

**Revise the dialogue for prospects
nominated by volunteer callers**

Sometimes phonathon committees ask volunteer callers for the names and phone numbers of people they think might be interested in donating during the phonathon. Unless these people are already donors, you'll need to revise the dialogue somewhat to make these particular calls.



Tools:

Use the following
Tools to help you achieve your
Successful Volunteer-led Phonathon:

▶ Sample Dialogue

7

Sample Dialogue (p.1)

Tailor the following dialogue template to your own initiative.

“Hello may I please speak with
<First Name, Last Name>?”

If the person is not available:

“I am a volunteer calling on behalf of
<Your Organization>.

When would be the best time to call back? Thank you.”

If the person is available:

“Good evening, <Last Name>,

My name is _____.

I am a volunteer calling on behalf of

<Your Organization>. May I ask for a few minutes?”

If not able:

“When would be a good time to call back and talk for
a few minutes?”

If not able to chat in near future:

“May I send you some information?”

If able to give some time:

“About <x number of > volunteers are together tonight
to raise money to help support vital services and
programs for <Your Organization>. The most critical
need right now is <brief statement of need to be met>.

This program is responding by <brief statement
of solution>.

Would you consider a gift of \$ <suggested ask> _____
to help meet this need?”

Pause and wait for answer.

If “yes” now or after initial hesitation:

“Wonderful! May I confirm your address, and other
contact information such as fax and email?”



I can complete your pledge of support tonight by putting your gift on <Visa, MasterCard or American Express> and I can send you confirmation of your pledge which you should receive in the next couple of days.”

If prefer to pay by check:

“Yes, I can send you a pledge card for you to return with your check right away.

Thank you very much for continuing your support.
Have a good night!”

If hesitant and undecided:

“Perhaps I can answer any questions you may have.
or Can I put some information in the mail for you to focus on at a later date?”

If “no” to the initial ASK:

“The need is great, <Last Name>, and your participation is very important to <Your Organization>. Would you be interested in making a gift of \$ <last gift amount or next lower level>?”

If “no” again:

“Your support is very important to us. Is there any amount that you’re able to contribute?”

If “no” to the final ASK:

“Thank you for your past support, <Last Name>,
May we keep you on our mailing list?
Have a nice evening.”





STEP SEVEN

Overview:

ACTIONS!

- Write a “dialogue” rather than a “script”
- Part One: The opening
- Part Two: The reason for calling
- Part Three: The ask
- Part Four: The confirmation

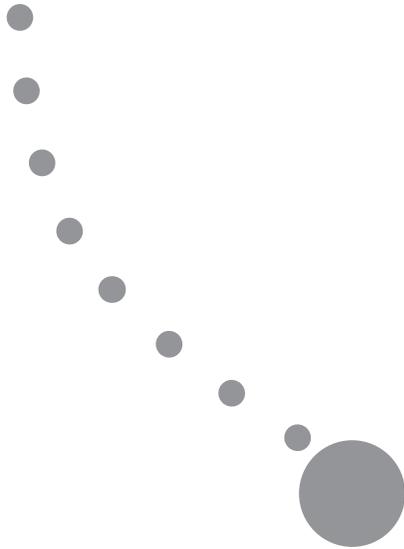
CONSIDER THIS...

- SUCCESS STRATEGY:**
Revise the dialogue for prospects nominated by volunteer callers

TOOLS

- ▶ Sample Dialogue

Review the Step



Ready for the
Next Step?



STEP SEVEN

STEP EIGHT

Prepare Caller Materials

What *else* can we give our volunteer callers to help them succeed?



ACTIONS!

Prepare your callers

Give your volunteer callers plenty of information about your organization, and their role in the phonathon, too. The more your callers know about your organization, the purpose of your phonathon and what to expect on Phonathon Night, the more comfortable—and successful—they'll be while making their calls.

Phonathon Orientation Packet

Create an orientation packet for each volunteer caller that includes a confirmation letter, background information about your organization, sample calling and pledge cards, your phonathon “dialogue” and a copy of the “Calling Tips” included with this handbook. (See the “Phonathon Orientation Packet Checklist” for details and other items to include.)

Prepare two copies of each packet: one to distribute to callers a few weeks before the event, and the other to have on hand for Phonathon Night. You'll need the duplicate packet because volunteers often forget to bring along the original.

Calling-Day Materials

You only need to have three additional items ready for your callers on Phonathon Night: your calling cards, your pledge cards and your Volunteer Caller Questionnaire (discussed in Step 10).

On Phonathon Night, place a stack of 25 calling cards and their corresponding 25 pledge cards at each calling station. This is usually enough for the first hour of calling. Once the caller goes through the stacks, give them a fresh supply.

Once calling is complete, distribute the questionnaire and find out what they thought about their experience.





CONSIDER THIS...



Your volunteer confirmation letter: An overview

The upbeat, comprehensive confirmation letter in your Phonathon Orientation Packet serves many purposes:

- Welcomes and thanks your volunteer caller
- Restates the phonathon purpose and goals
- Gives details on time, location, parking and site navigation (which doors and elevators to use, building sign-in requirements, etc.)
- Reviews confidentiality information
- Gives an overview of each element in the packet



Fact sheets, FAQs and “sticky” issues

A “fact sheet,” with bullet points about your organization and a list of Frequently Asked Questions (FAQs), enables your callers to answer prospects’ questions. If your organization has faced some “sticky” issues, address these also. There’s no way to anticipate every question, however your team “Answer Person” will be on hand as well.

 **SUCCESS STRATEGY:**
**Let your prospects know
you'll be calling**

Consider sending a “pre-call letter” about 10 days before your phonathon. Pre-call letters “warm up” the conversation and boost response by letting prospects know when you’ll be calling and why. Be sure to include a return envelope in case your prospects want to send in their donation *before* getting the call.



Tools:

Use the following
Tools to help you achieve your
Successful Volunteer-led Phonathon:

- ▶ Phonathon Orientation
Packet Checklist
- ▶ Calling Tips

Phonathon Orientation Packet Checklist

8

Use the following checklist to help you prepare and track the materials your volunteer callers need to be successful. A pocket folder helps manage the contents.

Then send the packet to your callers *at least two weeks* before your Phonathon Night to give them plenty of time to review the materials on their own. And ask them to bring the packets with them to the calling site on Phonathon Night—but be sure to have extra copies on hand for everyone, just in case.

- Confirmation Letter
- Mission Statement
- Phonathon Mission Statement or Goals
- Team Member List and Job Descriptions
- Phonathon “Dialogue”
- Sample Calling Card
- Pledge Card
- List of Prospect Names (to practice pronunciation)
- Phonathon Schedule
- Fact Sheet (about your organization)
- FAQs (especially about any known “sticky” issues)
- Calling Tip Sheet
- Copy of Direct Mail Solicitation (if integrating)
- Copy of Pre-Call letter (if using)
- Nomination Form (for volunteer callers to submit the names of people they think might be interested in donating to the phonathon)

8

Calling Tips (p.1)

How to act (and feel) like a pro

With a little planning and practice, the “dialogues” you have with donors can be comfortable, conversational, productive... and successful. Review these tips, and try them out on a friend. You’ll see how easy it is to reach out and communicate effectively with people who have previously given their support.

Style

- Be courteous—remember to ask permission before beginning your “dialogue.”
- Be friendly—the more personal the approach, the better the response rate and the larger the gift.
- Be professional—stay focused on your goal without coming off as aloof or businesslike.
- Be silent—once you ask for the gift, stop talking and let the donor think about it.

Tone

- Smile when you talk— it changes your physiology and people on the other end of the line can sense it.
- Don’t sound like you’re reading—it’s OK to adapt dialogue to fit your own conversational style.
- Practice makes perfect—if you go over the dialogue and do a little role-playing, you’ll sound conversational in no time.
- Spread your enthusiasm—energy is contagious, so let your voice show how much you believe in what you’re doing.



Mindset

- Friends calling friends—the people you're calling are donors that care about this organization, so you have something in common!
- A “yes” helps the program—about one in seven prospects will say yes, so enjoy each of your successes and the good it will bring.
- A “no” has no reflection on you—there are dozens of reasons people decide not to give, but YOU are not one of them.





STEP EIGHT

Overview:

ACTIONS!

- Prepare your callers
- Phonathon Orientation Packet
- Calling-Day Materials

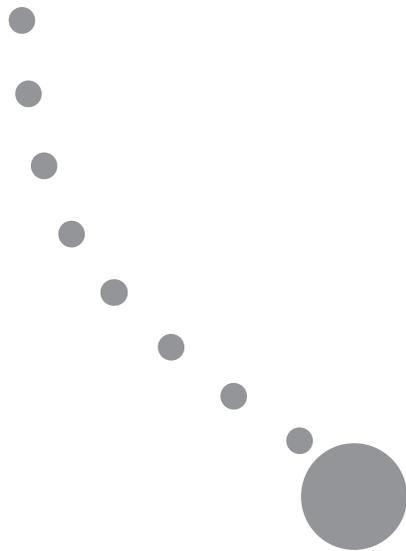
CONSIDER THIS...

- Your volunteer confirmation letter: An overview
- Fact sheets, FAQs and “sticky” issues
- Success Strategy: Let your prospects know you’ll be calling

TOOLS

- Phonathon Orientation Packet Checklist
- Calling Tips

Review
the Step



Ready for the
Next Step?

8

STEP EIGHT

STEP NINE

FINALIZE EVERYTHING

Are we ready for success—
and some enjoyment, too?



ACTIONS!

Hold your final phonathon committee meeting

Get together one last time shortly before Phonathon Night to go over all the details. Rehearse the process, and make sure everyone is clear on his or her roles and responsibilities. Also: Are the calling cards and pledge cards segmented correctly? Are the packets complete? Have you gathered all the office supplies you'll need (in addition to the “hardware”)? Now's the time to tie up loose ends.

Also go over the details of your schedule. Most look something like this:

5:30 - 6:30	<i>Dinner</i>
6:30 - 7:00	<i>Training</i>
7:00 - 9:00	<i>Calling</i>
9:00 - 9:30	<i>Awards and evaluations</i>

Are we ready for success— and some enjoyment, too?

Confirm “hardware”

Go to your calling site and test the phones to make sure they're working. If not, bring your own phones to use instead.

Also, make sure you have contact information for the site representatives and/or cellular carriers, too, in case something comes up during the event.

Confirm volunteer callers

Call your volunteer callers a few days before to remind them about their commitment—and to make sure they're still coming! As noted earlier, many may not be able to make it for one reason or another.

And if your committee can help solve a commitment problem, such as transportation to the site or childcare, do it.





CONSIDER THIS...

Prepare “fun,” motivational prizes

In addition to the donated awards you’ve gathered, plan some silly ones as well. A novelty item or simple certificate is perfect for awards such as:

- *Most Yeses*
- *Quickest Yes*
- *Most Inquisitive Prospect*
- *Chattiest Prospect*
- *Largest Donation*
- *Most Contacts Made*

SUCCESS STRATEGY:

Create a winning environment

Unless you’re calling from your own location, chances are the site will have little (if anything) to do with your organization or its mission. Consider creating a Mission Statement banner and hanging it where everyone can see, or bringing posters or other motivating visuals you have on hand to help set the mood.

Placing your tally board within everyone’s line of vision is important, too. You may even want to bring along a bell you can ring after each successful call. And a visit (or participation) from your executive director or other program leader can do wonders for morale.





STEP NINE

Overview:

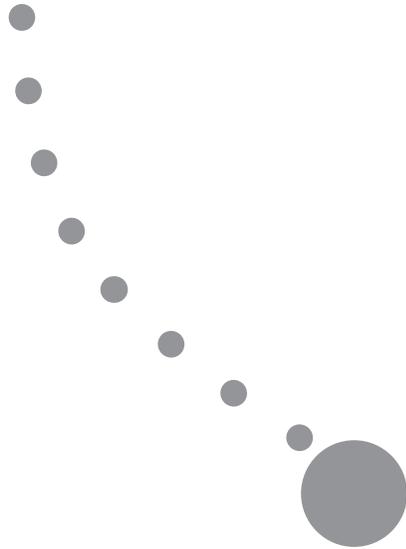
ACTIONS!

- 🔴 Hold your final phonathon committee meeting
- 🟢 Confirm “hardware”
- 🟡 Confirm volunteer callers

CONSIDER THIS...

- 🟠 Prepare “fun,” motivational prizes
- 🟡 **SUCCESS STRATEGY:**
Create a winning environment

Review the Step



Ready for the
Next Step?

9 STEP NINE

STEP TEN

CALL AND ASK

How can we best train,
inspire and motivate
our callers?



ACTIONS!

Before calling: feed and train

Feed everyone first—they'll be much happier if they're not hungry. But stay away from heavy foods. You don't want sleepy callers, either!

After the volunteer leader welcomes everyone and reminds them why they're here, start your training session. Usually this takes about 30 minutes and includes reviewing the materials and how to use them, and going over the dialogue step by step. Do some role playing, with leaders playing the part of prospects.

Also train your volunteers to handle inaccuracies on their calling cards, too (some are inevitable). Potentially awkward situations—like a divorce or a death—should be managed compassionately and professionally.

And if you'll be handing out awards or prizes (or dessert), give your callers a heads-up. It's fun to know these are coming.

How can we best train, inspire and motivate our callers?

🍀 **During calling—support and encourage**

Cheerleaders and runners are “on” immediately, celebrating successes and keeping the Tally Keeper up to date. Watch for callers who are having a tough time—and have some “sure things” on hand to re-energize them and boost their spirits.

Check in with callers at least every half hour, offering water, coffee and other refreshments.

🟡 **After calling: debrief and reward**

Once the calling is over, quickly tabulate the pledges—and celebrate your success. Even if you did not meet your stated goal, the funds you raised will make a difference to your organization and your callers need to know that.

Also, your phonathon is about more than just fundraising, even though that is the main goal. Wind down together and talk about the experience. Ask volunteers for their feedback and to fill out the “Volunteer Caller Questionnaire.” And by all means, share funny stories and present the awards and prizes.

One final detail: if any information on the pledge or calling cards is illegible or unclear, go over it now, before everyone leaves.





CONSIDER THIS...



SUCCESS STRATEGY:

Friends working together

Every one of you in that room care deeply about the success of your organization and its programs—so play it up. You may come from different backgrounds and live different lifestyles, but you're all here for one cause, which is reason enough to celebrate.



Tools:

Use the following
Tools to help you achieve your
Successful Volunteer-led Phonathon:

- ▶ Volunteer Caller Questionnaire

Thank you for participating!

Please take a few minutes to answer the following questions—we'd like to know your thoughts and are always looking for ways to improve our program. If you have any questions or topics you'd like to discuss in person, please do. Including your name is completely up to you.

Please rate the following on a scale of 1 – 5, with 5 being the highest (circle one):

Contact by volunteer leader	1	2	3	4	5
Orientation Packet	1	2	3	4	5
Dialogue Guide	1	2	3	4	5
Pre-call Training	1	2	3	4	5
Food and Refreshments	1	2	3	4	5
Calling Card Functionality	1	2	3	4	5
Pledge Card Functionality	1	2	3	4	5
Support from team while calling	1	2	3	4	5
Effectiveness of incentives	1	2	3	4	5
Atmosphere of calling site	1	2	3	4	5
Overall experience	1	2	3	4	5

Please give us your feedback on the following (continue your answers on the back, if you like):

- What did you like best about your experience?

.....

- What did you like least?

.....

.....



COPY ME

- Is the experience what you expected?
If not, what surprised you?

.....
.....

- Tell us about your best call.

.....
.....

- Tell us about your worst call.

.....
.....

- Do you feel you were successful?

.....
.....

- If you could change anything about the way this
phonathon was conducted, what would it be and why?

.....
.....

- Would you consider participating in another phonathon?

.....
.....

- Please add any other comments here—thank you!

.....
.....





STEP TEN

Overview:

ACTIONS!

- 🔴 Before calling: feed and train
- 🟢 During calling: support and encourage
- 🟡 After calling: debrief and reward

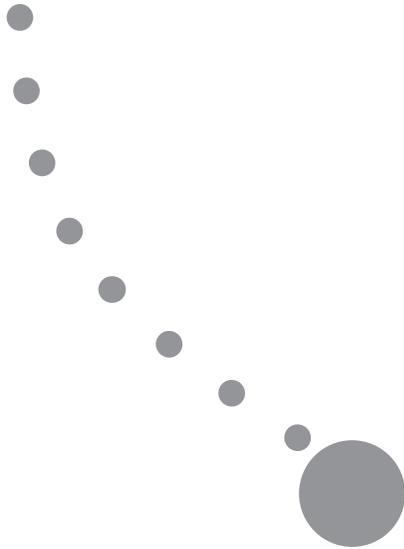
CONSIDER THIS...

- 🔵 SUCCESS STRATEGY:
Friends working together

TOOLS

- ▶ Volunteer Caller Questionnaire

Review the Step



Ready for the
Next Step?

10

STEP TEN

STEP ELEVEN

FOLLOW-UP and THANK

We've made the calls—
what's next?



ACTIONS!

Start the pledge follow-up system immediately

There's no time to waste. Run those credit cards and get those pledge cards in the mail (remember to include a return envelope, pre-stamped if your budget allows). Call back prospects whose questions couldn't be answered during the phonathon and send materials to prospects who wanted more information.

The second-day option

If you've scheduled a second calling day, confirm the details with all the key players. Remember to maintain the motivation by focusing on your mission, your goal and the concept of friends working together.

We've made the calls— what's next?

Thank absolutely everyone on your “extended” team

From your team leadership to your site custodians, everyone needs to be acknowledged and appreciated. In addition to volunteer caller awards, thank participants by sending letters from your board or executive director, by including their names in your newsletter and on your website, and by calling them in person. Remember to include:

- Volunteer leadership
- Staff leadership and support personnel
- Board member participants
- Volunteer callers
- Site donor
- Phone donors (if different)
- Food and refreshment donors
- Award, incentive and prize donors
- Site staff



Evaluate what went right and what went wrong

Gather your leadership team together and use the “In-House Evaluation” as a jumping-off point for discussion. You’ll have a lot to talk about, especially if this was your first volunteer-led phonathon. What worked perfectly? What would you do differently next time? How can you best respond to the issues raised on the volunteer caller evaluations?



CONSIDER THIS...

Phonathon donor thank-you letters

Keep in mind that even though your pledge card says “thank you,” it’s not the same as an official thank-you letter. Send a thank-you letter within two days after receiving each pledge payment.

 **SUCCESS STRATEGY:****Report results**

Send a written summary of your results to your board, staff, phonathon committee, and volunteer callers as soon as possible. If your phonathon was not tied to a specific mailing or event, it may take some time to get final numbers—especially if a lot of donors pledged by check. Some donors take their time, and others never respond at all.

After about three months, send another letter to your stakeholders reporting the final tally. And start planning your next fundraising phonathon!



Tools:

Use the following
Tools to help you achieve your
Successful Volunteer-led Phonathon:

▶ In-House Evaluation

Planning, organizing and calling— how did it go?

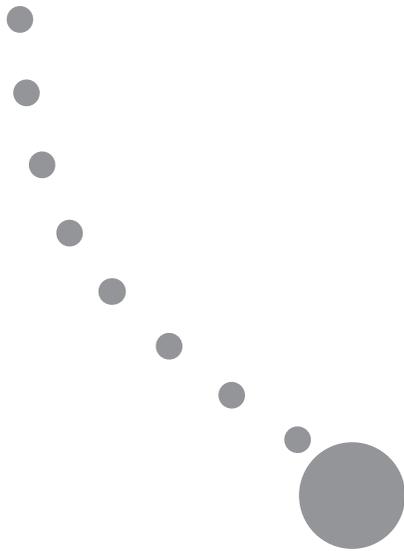
Discuss the following aspects, and others too, of your phonathon. What are your opinions on each of these topics? What changes might you make next time?

- The Calling Site: Calling area, ease of access, lighting, comfort, functionality, parking, safety, other
- The Timing: Choice of time of year and calling date, days and times, other
- The Refreshments: Quantity, quality, alternatives, other
- The Training Materials: Effectiveness, detail, easy-to-read, supportive, other
- The Mailing: Timely, helpful to donors, helpful to caller, other
- The Dialogue: Caller comments, effective, enough detail, applicable to all, other
- The Pledge Forms: Ease of completion, enough information provided, other
- The Follow-Up Mailing: Timely, response, other
- The Committee Process: Effectiveness, organization level, energy level, other
- Staff Support: Did callers and other volunteers feel well supported, other?
- The Funds Raised: Number of calls and pledges received, number of upgrades and amount raised per caller, by team and in total, other





Review the Step



Ready for the
Next Step?

STEP ELEVEN

Overview:

ACTIONS!

- Start the pledge follow-up system immediately
- The second-day option
- Thank absolutely everyone on your “extended” team
- Evaluate what went right and what went wrong

CONSIDER THIS...

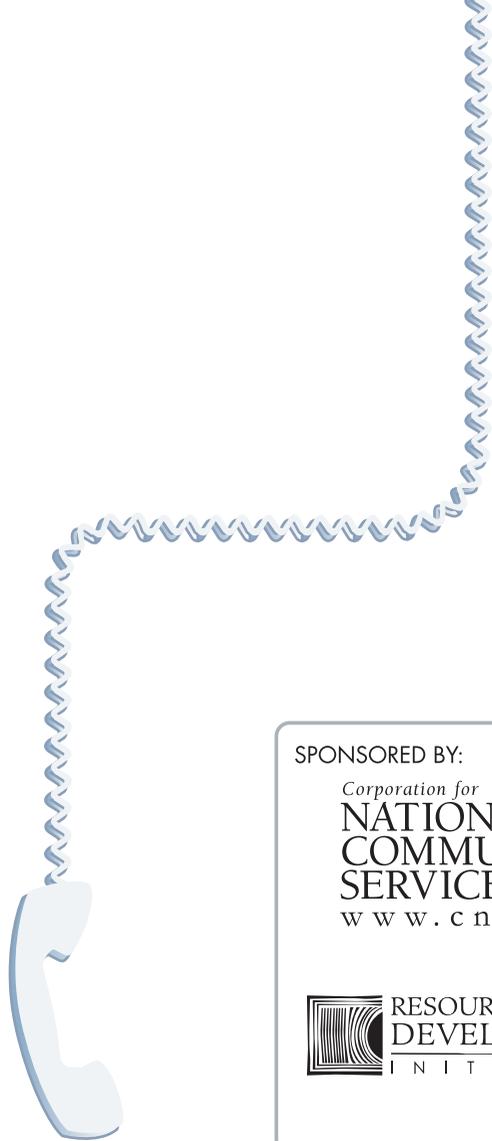
- Phonathon donor thank-you letters
- SUCCESS STRATEGY:**
Report results

TOOLS

- In-House Evaluation

The image features a minimalist, abstract design. On the left, a light gray trapezoidal shape is partially visible, containing the text 'STEP ELEVEN' in a white, bold, sans-serif font with a thin black outline. The rest of the image is composed of a white background and a large, dark gray triangular shape that points towards the top right corner.

STEP ELEVEN



SPONSORED BY:

Corporation for
**NATIONAL &
COMMUNITY
SERVICE** 
www.cns.gov



PROVIDED BY:



For more information, contact

Campaign Consultation, Inc.
2819 Saint Paul Street
Baltimore, MD 21218-4312 USA

T. 410.243.7979x10
F. 410.243.1024

www.CampaignConsultation.com
Success@CampaignConsultation.com