

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:



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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



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STEP SIX

Overview:

ACTIONS!

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

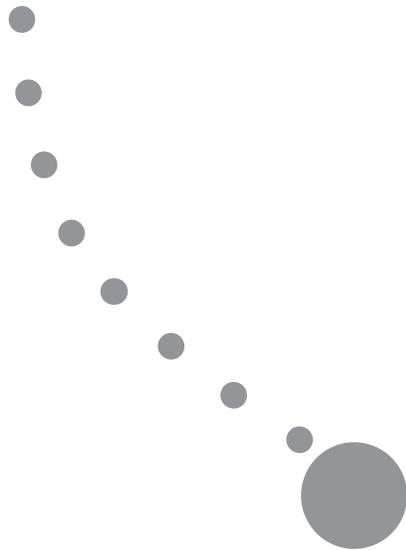
CONSIDER THIS...

- Segmenting your calling cards

TOOLS

- ▶ Sample Calling Card
- ▶ Sample Pledge Card

Review the Step



Ready for the
Next Step?

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STEP SIX