

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

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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)



COPY ME

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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

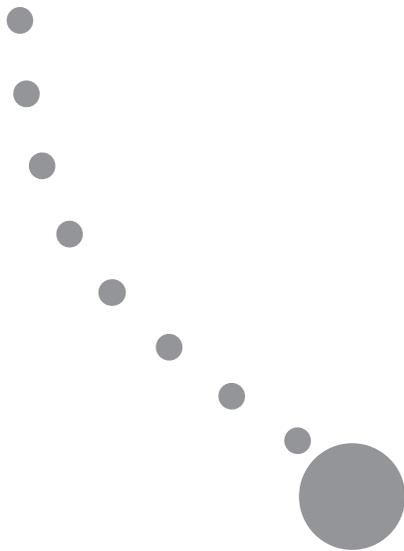
CONSIDER THIS...

- 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?

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STEP EIGHT