

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:

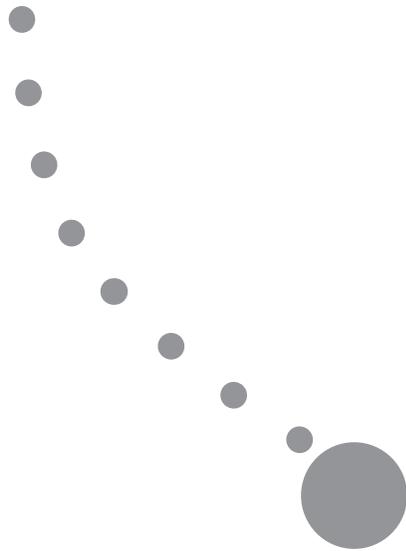
ACTIONS!

- 📞 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?

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