

Script for Donor Research Conversation

Hello, (donor), this is ___ at ____. I am contacting generous donors like you to research your level of satisfaction you with ___, and to get your opinions on a new program we're considering.

1. Find Emotional Connection.

Learn what their emotional connection is to the organization. Listen with interest to the donor's stories about interactions with the organization. Ask clarifying questions. Explore what they value about the organization. Get to the feelings.

Your support is invaluable. What has inspired you to share your time/money with (org name)?

(Offer feedback on what you heard. Get agreement.)

What about this support has touched a personal/emotional chord within you?

(If not, explore what organization could be doing.)

2. Find Out if This is a Satisfied Donor.

We really appreciate your contributions and hope you know that. Have you been happy with your donor experience? How can we further enhance your donor experience?

(Offer feedback reflecting their words as well as the feelings.)

3. Make the Case.

One of the best ways donors can make a long-term difference is by making bequests to ___ when donors no longer need their nest egg. They can plan today to give tomorrow.

This money would go to an endowment program that will provide help to ___ for years to come. Only the income from the endowment fund would be used every year.

Have you ever heard of other donors supporting nonprofits they value in this way?

What do you think about this type of plan for _____?

(If the reaction is negative, don't go further. Thank them for their time)

4. Research the "Ever Consider?"

Would you ever consider including a little money to ___ in your estate plan?

If No: *I understand. It is an important decision and we will likely have other donors that feel this way. It would help me understand our plan/endowment concept can succeed if you could share your feelings/reasons on this concept.*

(probe whether donor means "No, not now" or "No, not ever")

If Yes: *This is great news! Since this is a research call, I'd love to give you some time to think about an estate gift decision...When should I call you back?*

5. Conclusion.

Thank you for the insights you've shared and your time. We appreciate it so much. ▪