

INTRODUCTORY CALL STRUCTURE

- ❑ Connect – letting them know the purpose for the call
 - ❑ Thank them for their support
 - ❑ Introduce yourself
 - ❑ You are calling to follow up on the Introductory letter and to learn how best to serve them. Assure them that you are not calling to ask for a gift.
 - *Transition: do you have a few minutes?*
- ❑ Align - related to the giving history to affirm the donor's prior investment
 - ❑ Appreciate their long time giving
 - ❑ Note if a monthly donor
 - *Transition: I'm curious what led to your interest in AAHS, may I ask about that?*
- ❑ Be Curious
 - ❑ What inspired your first gift to AAHS?
 - ❑ What inspired you to give to project X (e.g. Friends for Life, Healing Paws Medical Fund, Spay it Forward, etc.)
 - ❑ Other engagement questions to learn more, if they're willing
 - *Transition: Thank you so much for sharing. I have one more question about how we can best contact you if that's okay.*
- ❑ ASK something of the donor
 - ❑ Say something like: "I'll be sending periodic updates. What's the best way for me to communicate - by mail, email or phone?"
 - ❑ Or, if they're very engaged, ask, "would you be interested in touring our new animal care facility or to attend (an event)?"
 - *Transition: Thanks. So, let me confirm ...*
- ❑ Align again:
 - ❑ Confirm contact information, including email address if you don't have it and that's their preference, ask for their cell number.
 - ❑ Or, confirm that you'll be sending details about the tour/event.
 - *Transition: Can I take one more minute to share an impact story with you and recognize your history with us?*
- ❑ Celebrate:
 - ❑ Thank them again for their support and belief in your mission
 - ❑ Tell short story of a life changed.
 - ❑ Report back on their lifetime giving or number of gifts and/or impact.

Following the call, note in the database the entire tone and tenor of the conversation. Also make key notes in the Donor Engagement Plan:

- ❑ Anything about pet/family/community relationships
- ❑ Anything about specific interests, career, hobbies, etc.
- ❑ Anything about giving capacity, other charities of interest

Finally, develop a plan and next steps to follow up with donor based on what you learned.
