

## 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.

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