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onecause® | WEBINAR

Mastering Relationship-Driven Fundraising:

A Step-by-Step Guide to Cause Selling & Database Integration



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Thursday, November 7, 2024



Let's Get Started!

What's one way you're currently using data to strengthen donor relationships?



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Meet Our Presenters



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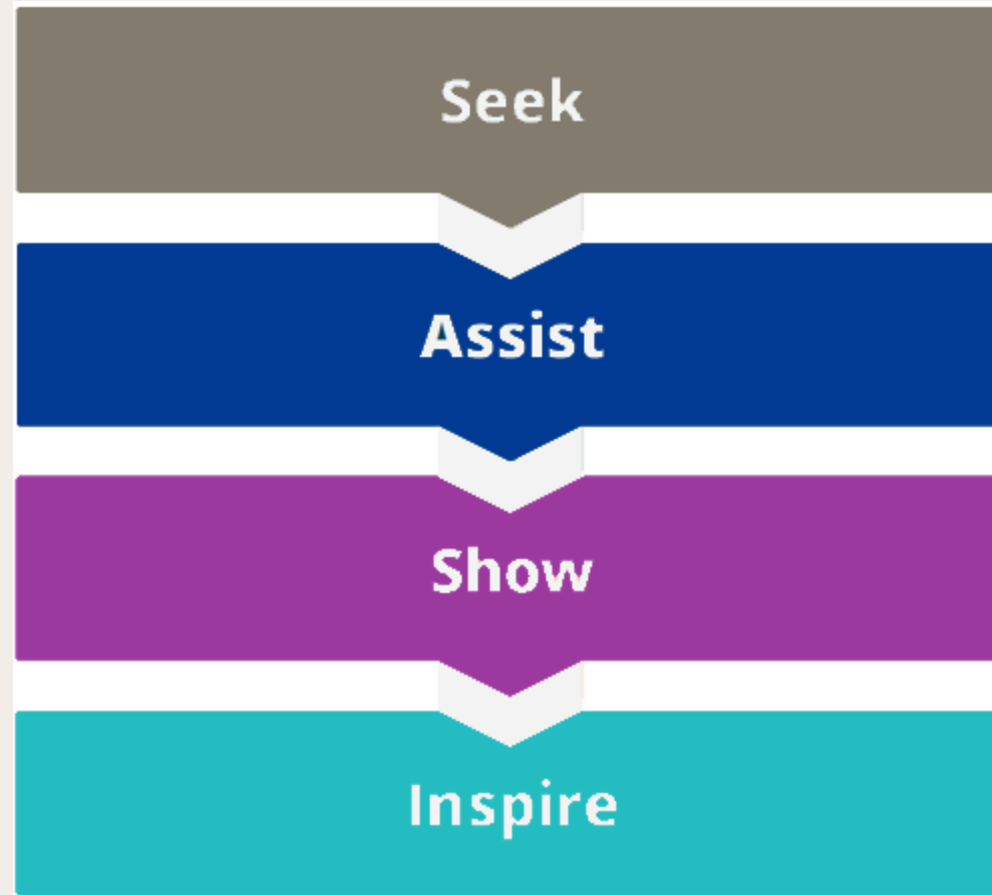
Mastering Relationship-Driven Fundraising: A Step-by-Step Guide to Cause Selling & Database Integration

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Introduction to Cause Selling: The Eight-Step Relationship-Driven Fundraising Cycle

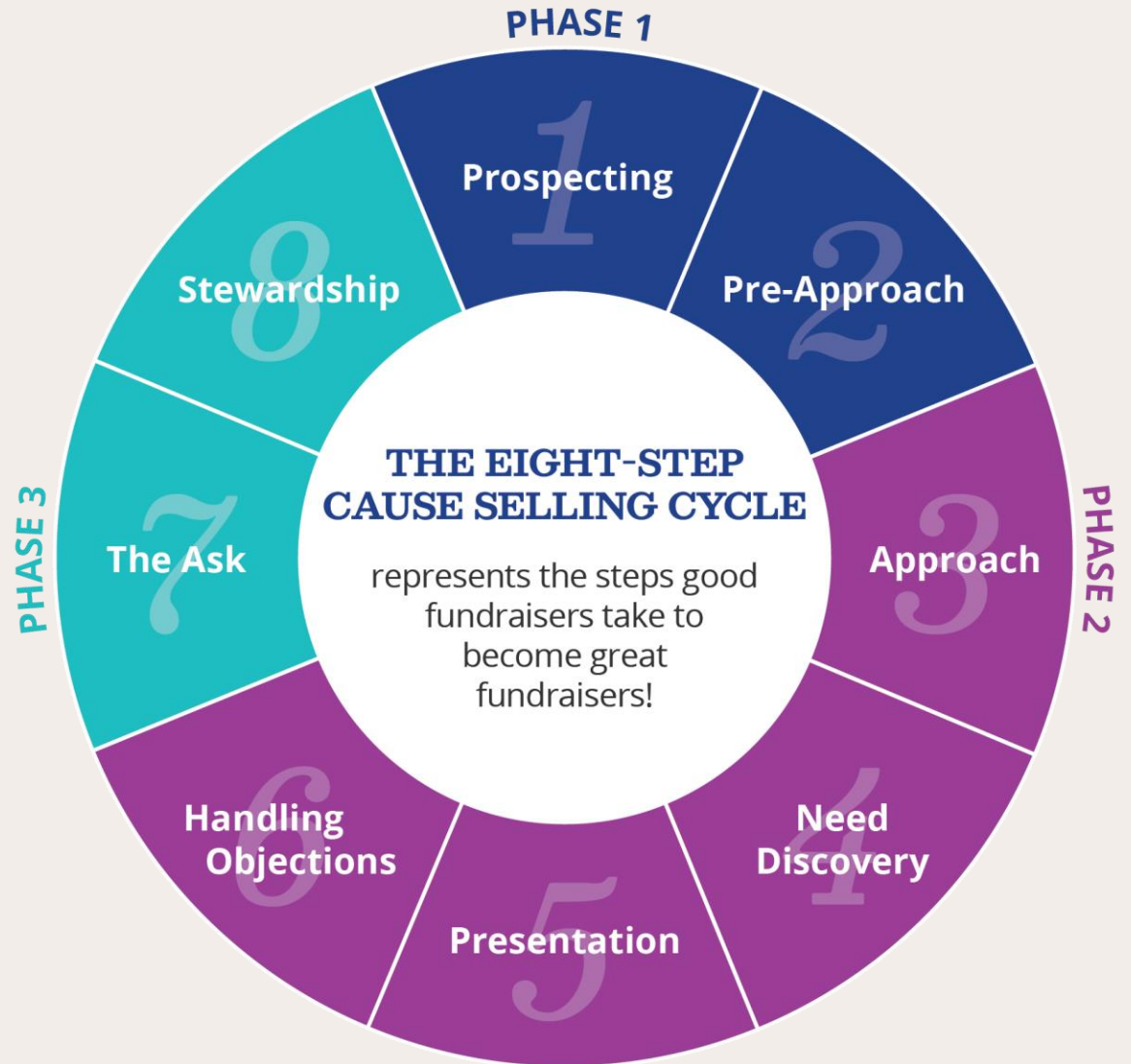
- Cause Selling Cycle Overview
- What information should be in your database
- What a well-managed database enables
- Using your database to inform your donor's journey through the Cause Selling Cycle
- Creating a database checklist

What is Cause Selling?



The Cause Selling Cycle

Phase One
Phase Two
Phase Three



What information should be included in a database?

1. Donors
2. Demographics
3. Giving
4. Engagement
5. Preferences
6. Other

What does a well-managed database enable?

1. Create a donor profile
2. Informs your fundraising strategy
3. Tailors your communications
4. Creates donor personas
5. Prevents donor attrition
6. Provides metrics

Prospecting

The process of **looking** or **searching** for prospective donors.

1. What do your current donors look like?
2. Who is already giving to your organization?
3. What connections are in your board members' profile?
4. What prospect classes are in your database?

Pre-Approach

Preparing to make a great first impression.

- How will you get that **first meeting** with your prospective donor?
- Use your **database** to create an Information Checklist.

Approach

Now it's time to meet with your prospect

1. What is the appropriate way to **greet** your prospect?
2. Can you **pronounce** their name?
3. What **approach** makes sense for your donor prospect?
4. What information will you glean from your database to **inform** your approach?
5. How will you make a **positive** first impression?
6. What can you do to grab your donor prospect's **attention**?

Need Discovery

Fundamental Questioning & Listening

1. How can your **database** help you with your question strategy?
2. What are the questions that **every donor** prospect needs answered?
3. What specific questions does **your donor** prospect need answered?

Presentation

Telling a **story** about the benefits of becoming a **true advocate** of your cause, building on the **connection** you've established with your prospect.

1. What does your database tell you about how your donor prospect wishes to engage with your organization?
2. What techniques work best with donor prospects?
3. How to select a presentation style based on your donor prospect's profile.

The Ask

The **natural conclusion** to a successful interview with a prospective donor: a **clear and concise** invitation to support your cause.

1. Ask based upon the needs, values, motivations and interest of your donor.
2. Plan your ask based upon LAI.
3. Anticipate questions and resistance.

Stewardship

Follow-up that fosters long-term donor loyalty.

1. How to thank a donor.
2. How to recognize a donor.
3. How to show impact.

Summary

Create Your Database Checklist

- Prospecting
- Approach
- Need Discovery
- Presentation
- The Ask
- Stewardship

QUESTIONS?



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