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After the Yes

12 Questions You Can Ask
Donors After They Say Yes



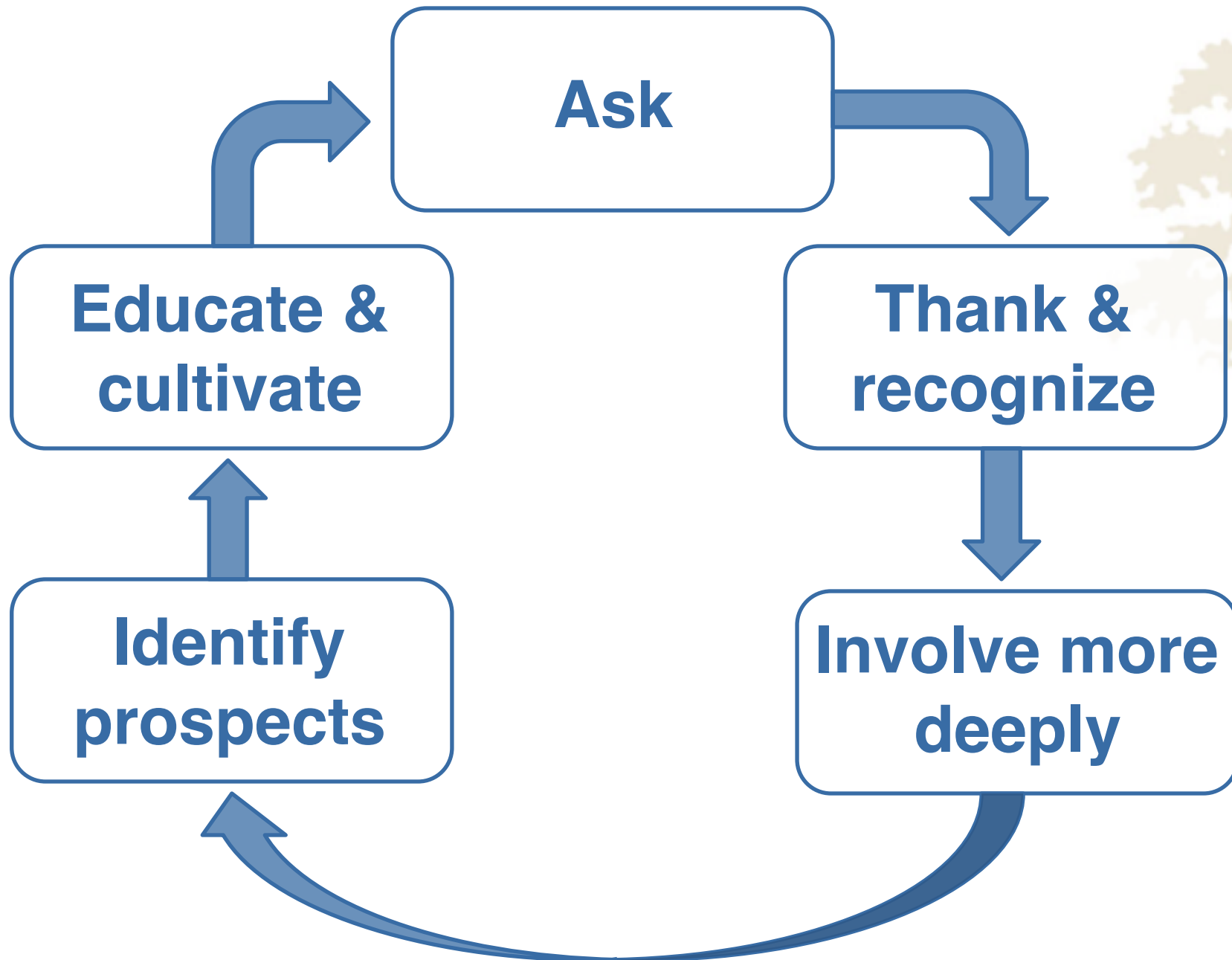


Renewal rates are declining

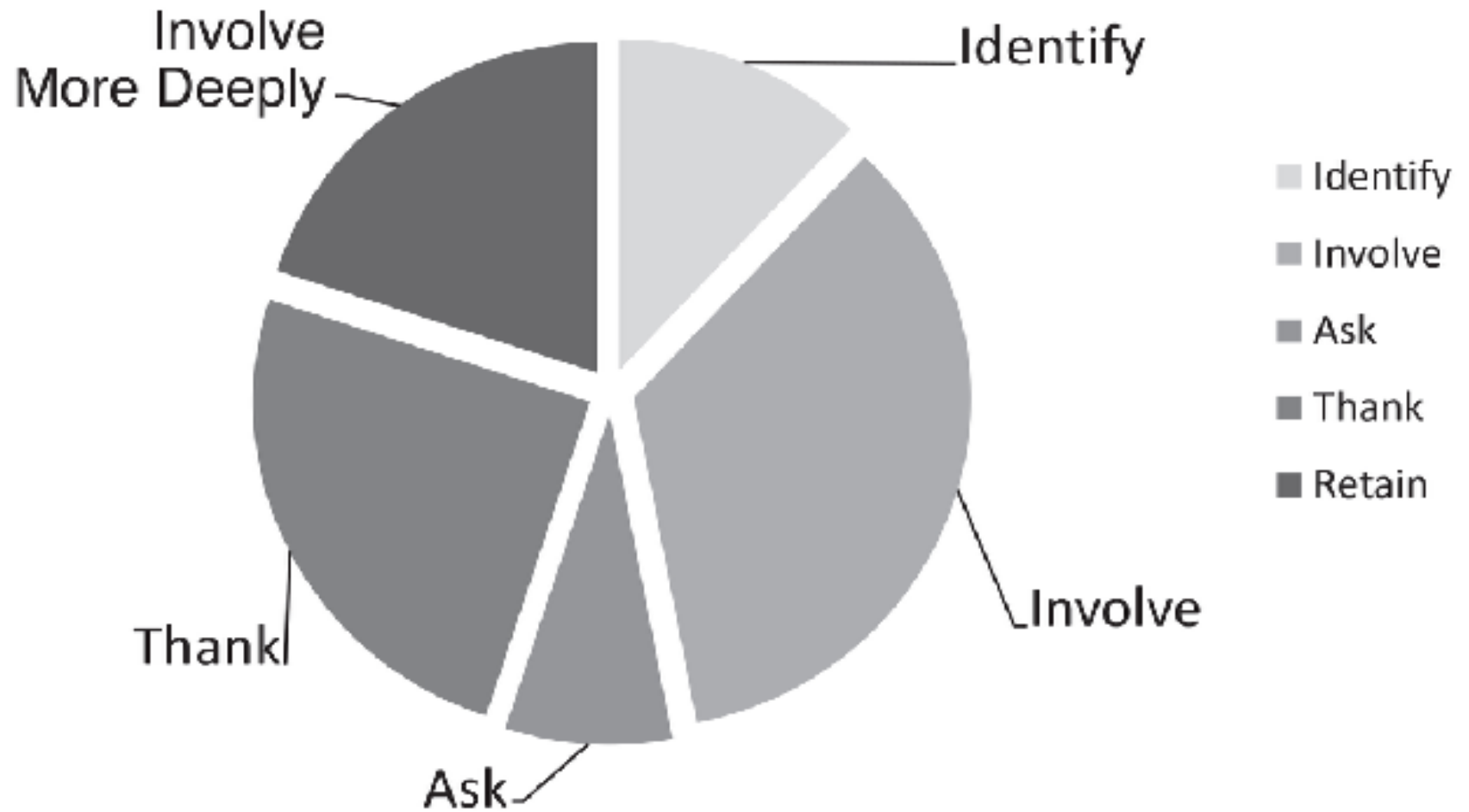
- Poor donor appreciation and engagement
- Virtual communication; less personal contact
- Economic inequality

How can you best respond?

Cycle of fundraising



Time allocation





Question: What do donors want?

Answer: Which one are we talking about?

After the Yes:

Customizing donor engagement

Each of your donors is different. Design your engagement strategy with their input.



After you hear “Yes,” what’s next?

Sample questions (Create your own sequence)

- How would you like to pay?
- How do you want us to use this gift?
- How would you like to be recognized?
- Do you want this gift to honor someone you care about?



- Why do you support our work?
- Would you be willing to give a testimonial?
- Would you come to a board meeting and talk with our board about why you give?

- How do you like to be kept informed – and how often?
- Will you share your commitment to our work with your family members?



- Can you recommend other potential donors?
- Would you consider volunteering to help with fundraising?
- What's your giving calendar?



After the Yes

DONOR TRACKING FORM

Donor name(s) _____

Date of conversation _____

Terms of gift and payment schedule

Full payment now

Check

Credit card Visa/MC/Amex # _____ Expiration ___/___

Securities or other

Notes:

Pledge

Payments will be made

Once per year on _____ (date)

Twice per year on _____ and _____ (dates)

Four times per year on _____, _____, _____, and _____ (dates)

Monthly

Notes:

Use of gift

Unrestricted

Restricted to _____

Notes:

1. Recognition

Would like to be recognized in our publications (*confirm correct spelling of name*)

Would prefer to remain anonymous

Notes:

2. Honor or remember

Gift in honor of _____

Gift in memory of _____

Notes:

3. Why does the donor support our work?



4. Willing to give written testimonial?

Yes No

Notes:

5. Willing to talk with board about why he/she supports our work?

Yes No

Notes:

6. Communication preferences - note top three in order of preference

- | | | |
|---|------------|-------|
| <input type="checkbox"/> Personal meeting | How often? | _____ |
| <input type="checkbox"/> Phone call | How often? | _____ |
| <input type="checkbox"/> Email | How often? | _____ |
| <input type="checkbox"/> Social media | How often? | _____ |
| <input type="checkbox"/> Newsletter | How often? | _____ |
| <input type="checkbox"/> Personal note/letter | How often? | _____ |
| <input type="checkbox"/> Website | How often? | _____ |
| <input type="checkbox"/> Other (describe) | How often? | _____ |

7. Willing to involve family members in future conversations?

Yes No

Notes:

8. Prospect leads

Name _____	Contact info _____
Name _____	Contact info _____
Name _____	Contact info _____

9. Potential fundraising volunteer?

Yes No

Notes:

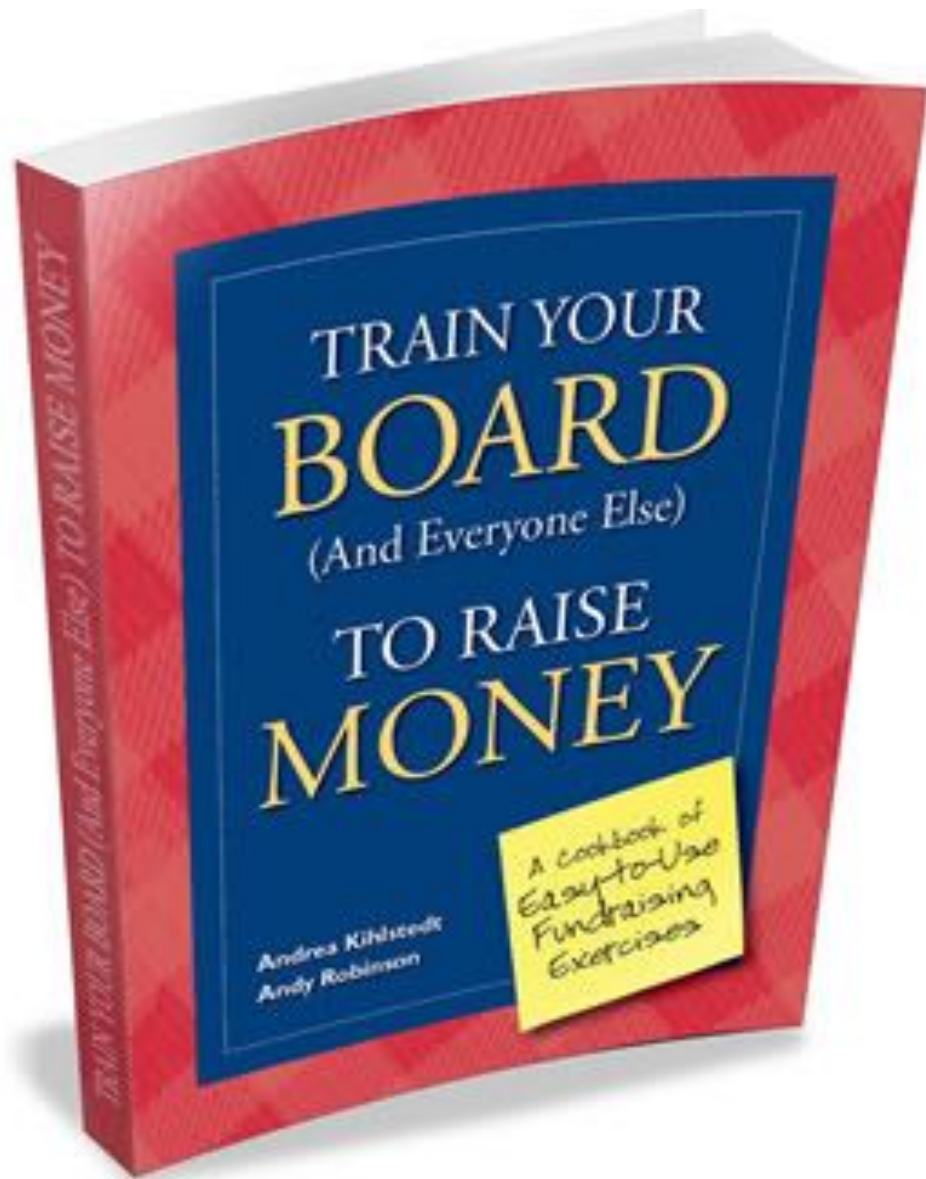
10. Personal giving calendar

- Annual
- Multi-year commitment; number of years _____
- As needed; OK to ask more than once per year



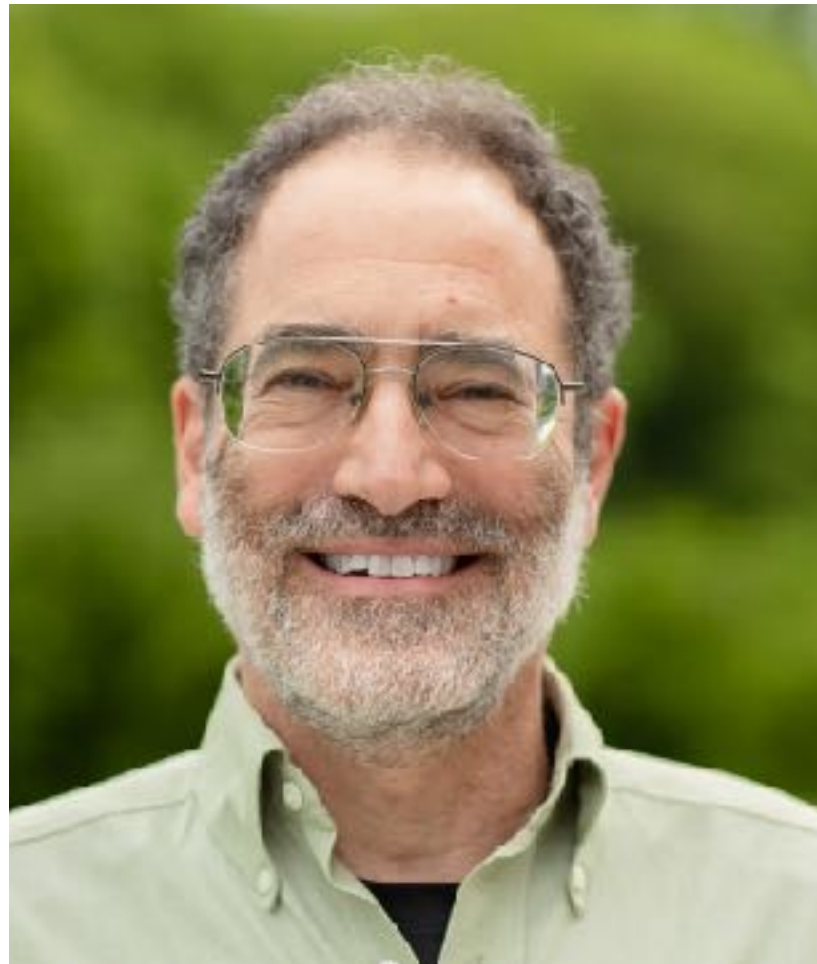
Questions ?





**Andy's book –
with Andrea Kihlstedt**

Available from
www.emersonandchurch.com



Good luck and stay in touch!

www.andyrobinsononline.com

www.trainyourboard.com