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

- Ask
- Educate & cultivate
- Thank & recognize
- Involve more deeply
- Identify prospects
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
   __ Personal meeting  How often?
   __ Phone call  How often?
   __ Email  How often?
   __ Social media  How often?
   __ Newsletter  How often?
   __ Personal note/letter  How often?
   __ Website  How often?
   __ 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