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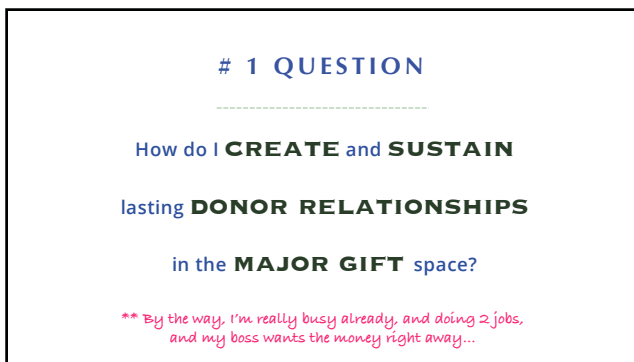
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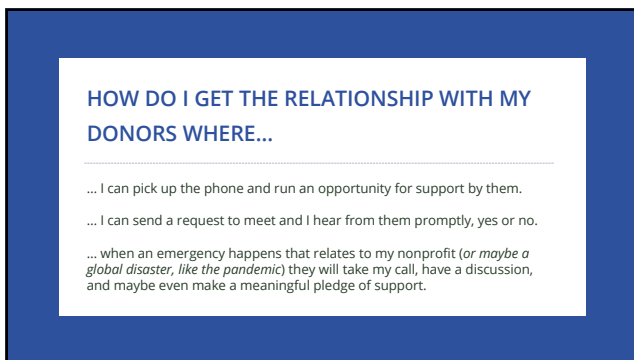
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## # 1 ANSWER

### DISCOVERY CALLS

- Offer the opportunity to learn the donor's reasons for support – to connect with their values and ideals.
- Allow you to continue previous conversations and explore current donor mindset and readiness.
- Ability to check in on donors, update them, and inspire.

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## MY TOP 3 DISCOVERY CALLS

- **The Thank You Call.**  
"I wanted to thank you for your support. Is now a good time to share how your gift is working in our community?"
- **The Intro Follow-up.**  
You know these: a board member suggests you contact a certain person about a gift. I thank and request an intro email. Once received, I move forward by email. "I would enjoy hearing more about your interest or connection to our work. May we connect over coffee, a phone call, or Zoom?"
- **The "It's Been A Minute" Call.** "  
I'm calling from <charity> and would like to share with you the great strides in <impact>. You were key to getting us here! Thanks so much for your past support."

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## THE METHODS

- Call on your donors with in-person visits.
- Call on your donors by picking up the phone.
- Call on your donors over Zoom, Teams, Meet, etc.
- *Use the platform that is most comfortable for the donor.*

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### CONVERSATIONS THAT REVEAL VALUES

We all have short-hand stories about ourselves that we easily share with others. They are easy identifiers of:

- origins** (I was raised on a farm...),
- family** (As the eldest...),
- education** (I attended Oxford...),
- income** (we had everything but money...)



“Tell me why is scholarship support important to you?”



“I notice you always designate your gift to...”



“In our conversations, you often mention the environment...”

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### QUESTIONS TO PROMPT VALUES CONVERSATIONS

- 1) How did your family do charity when you were growing up?
- 2) When you think about the work and impact of our charity, which ones make your heart sing?
- 3) Tell me about your three favorite charities - how did they become your favorites?
- 4) When you/your family sits down to consider your giving for the year, how do you choose who to support? Do you mind sharing?
- 5) What's the most important to you now?

WITH GREATER  
TRUST, DONORS  
WILL HAVE DEEPER  
CONVERSATIONS

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### SUGGESTED STEPS

- **Select a segment of donors:** start with a list of 10 or 20, but you likely can only get through 5 calls a day.
- **Note deets:** household info; first, latest, largest gifts; types of giving; key facts (e.g., volunteer, board member).
- **Prep pen + paper, cheerful voice, view a mission moment.**
- **Summarize call in a contact note and any next steps.** Highlight values and add note type “values + interests.”

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