



Not On the First Date! Dos and Don'ts for First Visits

In another post, I shared a bunch of pick-up lines to help professional and volunteer fundraisers get visits with current donors and new prospects. Now, assuming you're preparing for your first visit with an exciting new donor prospect, you might wonder what kind of behavior is appropriate on the first date?

As in dating, what you want from the connection determines how you should behave. If you want to cultivate donors who will stay with your organization for the long haul, then you need to build a relationship. What you do on the first date really matters.

Often times, we're so focused on fundraising as our purpose that we end up talking about money too soon, before we've established a relationship. With the building of a relationship comes knowledge of what interests the prospect and an understanding of the way she might like to be approached. We owe it to our organizations and to the people with whom we're meeting to take it slow and put the relationship first.

Here are some dos and don'ts for your first date with a new donor prospect.

1. Don't talk all about the organization. It'll seem like that's all you care about.
2. Do ask questions to find out about the person: their interests, experiences, and passions.
3. Do answer questions they ask you. As a young fundraiser, I often hesitated to share things about myself, thinking that it wasn't relevant or of interest to the donor prospect. But I soon learned that the people I met wanted to connect with a whole, real person, not just the voice of an organization. My visits got much better and my donor relationships much stronger after that realization.
4. Don't be afraid of questions you can't answer about your organization. People really don't mind hearing, "That's a good question, I'll find out and get back to you." And then you have a follow-up visit or call made to order.
5. Do tell stories. They are the best way to build an emotional connection and create in the prospect a true desire to know more.
6. Don't ask for money on the first date. This is tacky and transactional, suggesting that what your prospect may have thought is true – you only wanted to meet for the money. If you're building a relationship, there will always be a next step and a chance to ask for money the right way.

7. Do ask for help. As I mentioned in my last post, asking for help often leads to more money than asking for money. And getting someone involved in helping the organization is a great way to take the relationship to a deeper level.

Keep these dos and don'ts in mind and your first dates with new donor prospects will be fun and fruitful.

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