How Fundraisers can Establish Rapport with Prospects and Donors

As we approach an upcoming call with a prospective donor, we ought to plan the visit by structuring the call in advance. At the very beginning of any call we should strive to establish rapport. We seek to establish rapport to help the prospective donor to feel comfortable and to dispose them to look upon us favorably. To do this I utilize "2 G's and a C". **Begin your visit with a combination of gifts, gratitude and compliments to position the call for success.**

This is necessary with donors with whom you are quite familiar, too. Even for those donors, it is vitally important to reestablish connectedness. Creating rapport helps them to shift from what they have been preoccupied with up until the moment of the meeting. This serves to dispose donors towards us and the purpose for which we are engaging them. I am referring to the first several minutes that are essential minutes to set the right tone and gain a favorable disposition on the part of the prospective donor, to accomplish the task that we have set out to accomplish with them.

GIFTS

Oftentimes I will bring a thoughtful gift that I believe would be perceived as valuable. It could be a baseball cap with your organization's logo. It might be a book or an article. I may provide them with a stewardship report and inform them about the impact of their gifts. Whatever the gift, we hope they will be delighted and appreciate that they have been given it.

Be thoughtful about gifts. Some donors find trinkets and tchotchkes to be distasteful. They would prefer that organizational funds focus upon the mission and consider such gifts as taking away from that. For those donors you need to think about gift-giving more personally. You could provide a note from their scholarship recipient, an article about the project they funded, a photo, an impactful and relevant book, etc.

This introduces the experience of reciprocity. Reciprocity is so powerful because in our culture, when someone accepts a gift, there is a compelling motivation to reciprocate. A gift lets the door know we put thought into the relationship and value them as an individual. In turn, donors appreciate the thoughtfulness and it often opens them up to the idea of reciprocating kindness in return. Gifts can be very powerful.

GRATITUDE

It is worth recalling and expressing gratitude if the donor has been generous to our organization in the past, even the recent past. They appreciate the fact that we appreciate them. In addition to thanking them for their financial generosity be sure to express gratitude for any volunteering they have done for your organization.

If you visit someone with whom you do not enjoy a pre-existing relationship, it is likely someone with whom you hope to establish a relationship. With such individuals, express gratitude about the impact they are having in your community. They may support other charities and serve on non-profit boards. Recognize the meaningful work they do. Whether they lead a small business or gigantic company -- whatever it might be -- you can frame with gratitude your appreciation of who they are and what they are about and that you have noticed their significance from afar. This demonstrates knowledge and respect which may dispose them to regard you with favor.

It would be opportune to ask them about the other organizations they volunteer and support. Why those organizations? What do they love about them? Getting them to talk about what they care about can give you insight into how to build a relationship with them.

COMPLIMENTS

Make compliments as personal as possible. Comment about the photographs, plaques, awards that they have on display in their office or home. If there are photographs of a wedding day of a young couple, inquire about them with a compliment. I often use a compliment-with-question strategy as it is a great way to develop the conversation.

I read an article recently that stated that even insincere compliments are received with appreciation. Of course, it is not our business to offer insincere compliments, but it underscores how readily compliments are welcomed and assimilated. Look for sincere reasons to offer compliments and do so. This disposes the prospective donor towards what we are going to ask of them.

AND, LASTSLY, QUESTIONS

If you know the person and have had a previous relationship with them, then ask questions about information they had previously disclosed. These questions might refer to personal and/or professional matters that they shared with you on previous meetings. By maintaining notes of previous conversations, we can review such details in advance. This reminds them that we take them seriously and care about them and the people and circumstances of their lives. It may reawaken the trust that they have extended to us in the past.

Once I was granted 15 minutes with a very busy banker. She was someone who had been such a pleasure to engage with over the years. At the outset I asked her how her daughter in LA, her son in Chicago and her husband were doing. That immediately reminded her of the familiarity that we have shared and demonstrated my concern for her family. I relayed to her how grateful the Chancellor was for her significant volunteering and the leadership she had exercised on behalf of our university. I gave her a gift bag within which was St. Louis Cardinals baseball cap that had the university logo on the back. She chuckled, and went on to tell me that she was going to the Cardinals game that very night and would proudly wear it. Then I proceeded with the primary reason for the visit.

Offering gifts, gratitude and compliments, and adding personal questions if appropriate, should be prepared thoughtfully in advance of the visit when we structure the call. Then we go and execute the call. I have found that utilizing some combination of these elements at the outset of the meeting to establish meaningful rapport, has everything to do with setting the stage for a successful call.