



# DONOR THANK YOU CALLS

*A Key to Donor Retention*

**E-BOOK**

**With FAQs, Tips and Sample Script**

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**Fundraisers are very creative, they run amazing campaigns to inspire and recruit new donors, yet still the majority of these expensively recruited people fail to give a second gift. A one per cent improvement in retention could be far more valuable than a large investment in acquisition.**

**Chuck Longfield, Blackbaud**

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## 8 Most Frequently Asked Questions about Thank You Calls

### 1. Why should I care?

It's very simple. Donors who are called give more next time.

### 2. Who should make the call?

Whoever will be prompt, warm and genuinely grateful. Some folks recommend that volunteers, especially board members, make these calls. I believe folks are just as happy to receive a *timely* call from a staff member, as long as the caller doesn't sound like they're robotically checking a task off their 'to do' list.

### 3. When should I call?

It's best to do so within a month of the gift. After that it is more likely to be perceived as an additional solicitation.

### 4. What makes a great thank you call?

A smile. Seriously, with a smile on your face you'll have a smile in your voice. People perceive this. This works for *any* conversation you have with donors.

### 5. What else *should* I talk about on the call?

Nothing. The greatest impact of this call comes from its purity. Donors are pleasantly surprised that you've called simply to express gratitude and that you don't want anything else from them.

### 6. What else *can* I talk about on the call?

Whatever your donor offers to talk about. As a caller, part of your job is to listen for that offer. If they want to gush about how much they like your program, let them. And engage them a bit with open-ended questions about what they like most and/or what you could do to make an even greater impact.

### 7. Should I leave a voice mail message?

Absolutely! It's silly to waste the time/energy you took to make the call. Try again one more time because research shows [retention is better when you speak with a live person](#). Be pragmatic though. If you know you won't have the time to try again within a two-day timeframe, leave a message now. Keep it short. No one wants to come home to a long, rambling voice mail.

### 8. If I leave a message, should I leave my phone number?

If you're a staff member, yes. *"If there's ever anything I can help you with, here's my direct number. Please don't hesitate to call me any time. Thanks again!"* If you're a volunteer, it's really up to you. If you're comfortable taking an unexpected call at the office or standing in line, go for it. If not, then no.

## 6 Most Important Elements of a Great Thank You Call

Aside from the things that come up in the FAQs, here are a few things of which to be aware (and they are incorporated into the Sample Script).

**1. Use the person's name.** Remember, this is a personal call. There's a lot of power in calling a person by their name. It makes people immediately more receptive, because they know they are known. And the number one thing donors care about, according to groundbreaking research by Penelope Burk, author of [Donor-Centered Fundraising](#), is to be shown they are known.

**2. Tell them your name and connection.** Your donor shouldn't have to be suspicious of you even for an instant. Let them know who is calling .

**3. Immediately get the 'thank you' out there.** We've all become apprehensive when we receive calls from phone numbers we don't immediately recognize. If I had to boil down your thank you call to one sentence it would be this: *"Hi Joe, this is Claire working for Beloved Charity, and I just called to say how much we appreciate your recent gift to support our Important Program!"* With a smile in your voice, that'll do the trick. If you hem and haw too much, or have too much introduction, they'll hang up on you before you get to the gratitude.

**4. Acknowledge the purpose of the gift.** Remember, donors like to be shown that we know them. The caller should know for what campaign or purpose the gift was made, and should mention that. It not only makes the call more personal, it also reminds the donor of the decision they made. Donors responding to Penelope Burk's surveys consistently say that, first and foremost, [the way to keep them](#) is with a (1) prompt, (2) personal acknowledgment, (3) reassuring them their gift will be used as intended. If it was in response to a challenge, acknowledge that too. Make the donor feel super good in whatever way you can. *"You know, you really helped us maximize that challenge gift. We were concerned we wouldn't reach our goal, but you pushed us over the top!"*

**5. Be prepared in case the donor wants to talk.** If you're a staff member you probably know plenty about your organization and can tell inspiring stories and quote compelling statistics to show the donor's impact. If you're assigning the call to a volunteer be sure to prepare them with a Fact Sheet and a few story vignettes showing how the donor's gift made a positive difference. And let them know it's okay to say *"Great question! I don't know the answer, but I'll find out and get back to you."*

**6. Be interested in your donor.** If the donor is willing to talk this is a great opportunity for direct donor research. Ask open-ended questions about the donor's family, interests, work, and history... all the things you would ask someone who you were just meeting, and who you hoped might become a true friend. This is all about building relationships.

## Most Important Donors to Call

### Which donors should be called?

People often ask me who should be targeted to receive these calls. After all, you can't call everyone. Can you?

The answer to this question is: It depends. If you're a small nonprofit then calling every single donor may be your best way to begin to build your donor base. You need to wow folks and impress upon them not just how grateful you are but how efficient and on top of things you are. The more you build trust, the more you'll build a relationship. Then these donors will be more likely to stay with you, and you won't simply be churning donors in and out keeping a static mailing list.

Here's a mantra borrowed from Penelope Burk of [Donor-Centered Fundraising](#), with my italics added:

*Treat every donor like a major donor when you can.*

Of course, it isn't always practical to call every donor. In that case...

### PRIORITIZE your calls in this order:

#### MUST CALL:

- **First-time donors.** Ideally you would call every single new donor because this is the time when you are most vulnerable to losing folks. [Penelope Burk's research](#) shows you'll lose 50% of folks between the first gift and the second appeal (If you haven't [read her book, make it be the one take-away you get](#) from this e-book; it changed my entire practice!). The same research shows that new donors who receive a call within 48 hours of making their first gift will give approximately 40% more the next year (and this research has been [recently confirmed](#)). Calling them can make a huge difference!
- **\$100+ first-time donors.** If you can't manage to call all new donors, call donors of \$100+. This is more than a token gift, suggesting excellent potential for building a lasting relationship. Treat these folks like gold.
- **Donors who increase their support.** This may mean coming up with a formula so that you can generate a list from your database. For example,

donors who give double last year's amount... donor's who increase to the next giving level... donors who give 20% more than last year, etc.

- **Donors who give at a specified dollar cut-off point.** All leadership level donors should be thanked personally if you want them to stay at this level. You may want to assure that your major donors (e.g., \$1,000+ get a call from your Executive Director or Board President to show them that you noticed what a special commitment they're making).
- **Donors who reach a consecutive giving milestone.** Loyal donors are golden. If you don't have a means of recognizing consecutive year givers, consider doing so. (e.g., some organizations have a "Ten'ure Society" for folks who've consistently given for 10 years. When a donor reaches this milestone, call and congratulate them! These are donors who are most likely to leave you a legacy at some future point.

Donor communication is not an add-on. It is a core fundraising function that produces long-term income security. Make meaningful communication with donors your development department's top priority.

- Penelope Burk, *Donor-Centered Fundraising*

**Donors who are called give more next time.** Pause a minute to remind yourself how important these calls are. [Penelope Burk's](#) research in [Donor-Centered Fundraising](#) revealed those who were called subsequently gave 39% more. After 14 months, when asked again, they gave 42% more!

**Even though you can't call all of your donors,** selecting just a few to call each week can have a huge impact. Did you know that [increasing donor retention by 10% today can enhance the lifetime value of your donor base by 200%](#)? Again, because these calls make such a huge impact on donor retention, they must be handled promptly. If you assign them to volunteers don't make the assignment an optional "do this whenever you can get to it" sort of thing.

Aside from the "must call" donors discussed above, here are some tests you can try to see if it makes sense to move other groups of supporters into your "must call" list next year.

### **TESTS:**

- **Monthly and recurring donors.** If you have a monthly giving program these supporters should get at least one thank you call during the course of the year. If you don't, you'll still have donors who make multiple gifts. For these folks you should establish some sort of "trigger" for making calls (e.g., whenever a donor makes their third gift within X time frame). If you don't have the bandwidth to call all these folks, call a subset. Then track your results. If the group receiving calls renews at a higher rate, or gives significantly increased gifts, then you can roll this strategy out to a larger group next year.
- **Donors you'd like to upgrade to the next giving level.** Let's say you have a lot of donors giving in the \$250 - \$999 range. We too often ignore our mid-level donors, and they get stuck in the middle forever. Try calling one in five (a random sampling) and see if they renew at higher rates than those who did not receive calls.
- **Donors who also engage with your organization in other ways.** A donor who also enrolls their kid in your camp program, or comes to a performance, or buys a product or attends a workshop is more engaged with you than someone who gives money alone. It's worth testing to see if a phone call might upgrade giving from these folks. Remember to show them that you know them when you call (this is where it really helps to have integrated databases).

## A Word about Thankathons: Good, Bad and Ugly

### **The Good:**

Thankathons are another technique to incorporate planned donor thank you calls into your acknowledgment/stewardship program. It's a great way to involve volunteers because, inevitably, it's a feel-good experience for everyone involved. It's more fun to do it as a group – with refreshments of course! And when you gather everyone together you can do some training and practice with the script. You also have the opportunity to share an inspiring “mission moment” that gets folks revved up to make the phone calls. You can share a client story, or simply go around the room and ask volunteers to share their own personal story about why they're involved. Here's what happened one time when I did that.

**I just toured our adult day health center and was blown away! Everyone was so happy, and you could just tell this meant the world to them. I can't wait to get on the phone to thank donors, on behalf of these seniors.**

### **The Bad (but not really):**

It's hard to get a group together these days, and fewer places have a bank of phones from which to call. So it's okay to dole out names and have folks call from their home or office. Leaving messages on voicemail is fine. If you get someone on the phone most supporters are pleasantly surprised to receive a call that's purely a thank you, and this pleasant feeling is passed along to the caller. For volunteers who've been afraid to pick up the phone to call donors requesting support, this is a terrific way to get their feet wet. Just make sure to arm them with a script in advance (see below), and give them a little time to practice.

### **The Ugly**

Do *not* use thankathons as an excuse to relieve your staff (and/or assigned volunteers) of the responsibility to make real-time calls. Prompt, personal calls are the gold standard. In my experience I've found that the best way to assure this happens is to assign this responsibility to staff on an as-the-gifts-come-in basis. That doesn't mean you can't *also* ask volunteers to make calls. Truly, it's difficult to thank your supporters too much.



# Donor Thank You Call Sample Script

## HOW TO USE YOUR SCRIPT:

**It's just a guideline. Don't read it.** You want to be yourself. Every thank you call will be different. Yet there are some common elements of a great thank you call that you'll find in the suggested sample script (the highlighted words are the ones to be sure to include).

## SAMPLE SCRIPT:

### Begin

#### *Introduce yourself:*

*Hi \_\_\_\_\_ (donor's name). This is \_\_\_\_\_. I'm a \_\_\_\_\_ (staff, volunteer, alumnus, board member, etc) of \_\_\_\_\_ (org name). I'm NOT calling to ask you for money. I'm just calling to thank you for the donation you made to \_\_\_\_\_ (specific project, fundraising appeal, etc.). It really means a lot and I wanted to tell you personally how grateful we are.*

### Pause for a second or two. One of these things will likely happen:

1. The donor will be silent, caught off guard, or confused about what to say.
2. The donor will say something but won't be particularly effusive or seem interested in chatting.
3. The donor will say something appreciative about your organization or how nice it was of you to call.

If it's option #1 or #2, simply:

#### *Say something particular about this gift and thank again:*

*Okay, I don't want to take up any more of your time. I just wanted to thank you again for (making this first gift/increasing your giving this year/your longtime support. Have a wonderful day/evening/week-end!*

If it's #3 and the donor seems open to being engaged, you can have a brief conversation about their connection to your organization, why they give, etc. But gauge their interest level and don't overstay your welcome.

### If they do want to talk, then:

### ***Get to know the donor:***

*I want to respect your time but if you have a moment, I would love to know more about what inspired you to give and the programs that interest you the most.*

**Listen. Converse.** And please take notes (see **A Call is a Terrible Thing to Waste**, below). You may hear about other organizations they work with, about their family background, etc. Everything you learn becomes an opportunity for further bonding.

**You can also ask open-ended questions to elicit greater response.** Ask what feels natural to you. The key is to find the delicate balance between appearing genuinely interested in the donor as a person (not just a wallet) and making them feel they're undergoing the third degree. Be brief. But don't leave a donor who wants to chat high and dry. Here are suggestions:

- *How did you first become interested in our organization?*
- *Tell me a little bit about why this cause matters to you.*
- *If you had to pick the program that most interest you, what would it be?*
- *Is there anything I haven't asked that you'd like to share with me?*

### ***Invite the donor to get to know you better:***

*Would you like to be involved with us in other ways beyond being a donor?*

If the donor is receptive to becoming more involved, and you feel that you've made a real connection, you can also ask if they'd like to join you for coffee at their convenience. Be careful with this, because you don't want them to feel that you're trying to ask them for another gift at this point.

### ***Wind up the call with a final thank you.***

This is also an opportunity to verify their contact information (you may have a correct phone number, but their mailing or email address may have changed).

**Don't get discouraged if most donors don't want to chat a lot, or if you mostly end up leaving messages. The thank you calls still count!**

## A Call is a Terrible Thing to Waste: What to Do After the Call

### **Make a record.**

Whether you just leave a voicemail or have a live conversation with a donor, you want to make a note of the results and record them in your database.

Remember, the goal is to show donors we know them. Once they've told us something, they expect us to remember! If you assign the calls to volunteers or other staff, make sure they report back to you with the results of their calls. It's *your* responsibility to make sure this information is captured so that you can become more and more donor-centered as you build your relationships.

You may want to make yourself (or your volunteer) a cheat sheet or checklist onto which notes can be added during the call. Some things to watch for:

- Was the donor receptive to the call?
- What did you learn about why they gave, their favorite programs, etc.?
- What else did you learn about their interests and/or other philanthropies?
- What did you learn about their family and/or personal/professional background?
- Did they offer any suggestions for improvement?
- Did they have any complaints?
- Were there any changes to their contact information.

Don't forget to code the simple fact that this donor received a call, especially if you're doing a test. It's the only way you'll know if those who were called performed better than those who were not called.

### **Do what you said you'd do, and do it NOW.**

This seems obvious, but sometimes there are too many cooks in the kitchen. If your job is to call, but it's someone else's job to follow up, make sure it doesn't get lost in the shuffle.

### **Channel an attitude of gratitude.**

Your overriding mantra for the call should be to make it feel as warm, gracious, appreciative and personal as possible. In fact, that's why I emphasize using the word "personally" in the script. This is not an automated response or a generic thank you letter. No one else is getting this call. No one else is making this call. This is between you and the donor. A little ray of sunshine. A verbal bouquet of flowers. And maybe, if you're lucky and the donor feels a bit chatty, a little bit longer moment of bonding around your shared values. How lovely is that?

### **An offer you'd be crazy to refuse:**

Click [here](#) to set up a 15-minute appointment to chat with me about your stewardship program, or anything else that's keeping you awake at night. I

encourage you to take advantage of the opportunity to send me your key questions in advance so we can maximize the use of our time together (use the “comments” section). It’s **absolutely free**. But my available time slots are limited, so **claim your time** now.

Need more help than that? I’ve been in your shoes. I’ve tried to do everything I knew I *should* be doing, but somehow couldn’t convince my leadership that it was *worth* doing. I’ve wanted to hire a consultant to help me persuade... plan... probe... prioritize... persuade... put into practice... but couldn’t afford it and just couldn’t figure out how to make everything happen.

That’s why I’m now offering a simple and quick ‘**Hour of Power**.’ You’d be amazed at what we can pack into an hour, especially if you let me know a little bit about your challenges in advance of our session. We can do coaching, brainstorming or problem solving. Your choice. Grab your ‘**Hour of Power**’ **here**. Then send me whatever you’d like us to review or discuss. I’ll review it in advance; then we’ll spend an hour on the phone talking about ways to help you succeed. Plus, I’ll answer any questions you have.

### **Finally...**

This e-book is excerpted from my new Special Guide: **HOW TO CULTIVATE AN ATTITUDE OF GRATITUDE AND KEEP YOUR DONORS** . With 41 full pages jam-packed with *both* the theory *and* the practice of gratitude, it has everything you need to persuade your leadership of the value of putting more resources into this absolutely essential practice. Plus there are plenty of templates and scripts so you don’t have to start everything from scratch. And there’s a great Resource Guide and a lot of really cool creative ideas. You may want to **check it out** .