

Follow up, follow up, follow up!

Dr Alan Watkinson, Trinity College, University of Melbourne

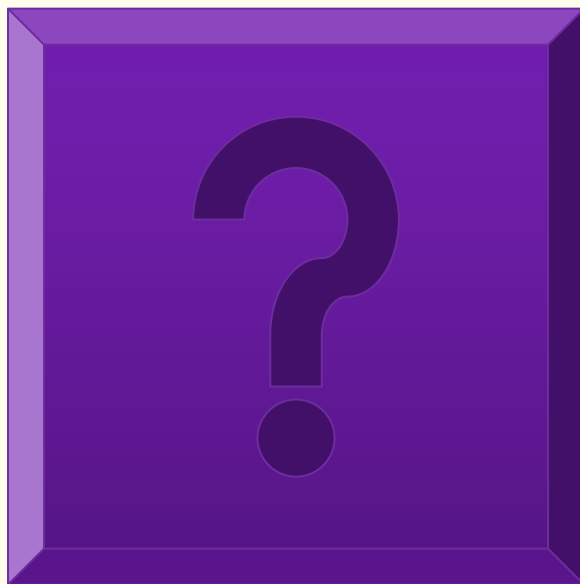
Saturday, 26 February

12 noon

So, you've just had THE perfect meeting...?



But what comes next?



The importance of the Follow-up

- What are we following up?
- When does the follow-up occur?
- Is this how it is done – really?
- Some practical suggestions
- Follow-up questions





BLogicThink.com/PayPalPress

The 10 Guiding Principles For Any Ask:

- The more personal and sincere you are with the people you are cultivating, the quicker you will be able to make the ask.
- Every prospect must be treated separately and distinctly.
- Anyone asking for a gift must first make his or her own gift.
- Ask for a specific amount for a specific purpose.
- Consistent givers can and will make larger gifts.
- Always use we instead of I in any ask because that connotes that the ask is being done with all the strength and backing of the organization.
- Any organization's planned giving program must be coordinated with all other fundraising programs.
- Every campaign prospect must be asked for a specific amount, with guidelines on how to fund the gift and with a proposed time frame.
- At the initial ask, stay committed to the ask amount.
- **The ask without the follow-through will result in no gift.**

The NonProfit Times

<http://nptimes.blogspot.com/2008/01/fundraising-10-ideas-for-making-ask.htm>

What do we have to follow up?

- Closure of a solicitation
- Details of an agreement
- Dates for a next meeting
- Provision of information as promised
- Details of stewardship

Closure of solicitation

- What have you agreed?
- Have you got your original ask?
- Are there terms and conditions you have to get right?
- What do you have to do now?
- Who do you have to inform?
- When do you 'sign off' the gift?
- Who makes the next 'move'?



Details, details, details

- Follow up to make sure:
- Dates, times and amounts are clear
- Expectations are clear
- There are no nasty caveats
- There are no unforeseen hurdles
- The capacity and intention are genuine
- You know what YOU have to do next!
- **WRITE IT ALL UP AS SOON AS POSSIBLE!**



Dates!

- How much time do you need before the next meeting?
- What is your agenda?
- Where will it take place?
- Who will confirm?
- DON'T leave it too long
 - Discuss before leaving
 - Make sure it is clear who makes the next move
- Make sure you prepare everything for the next meeting in plenty of time. CHECK LIST.



More information

- Confer with legal team about any conditions proposed
- Check internal policies about naming rights etc
- Draft the agreement and have it checked and proofed
- Have documents prepared re performance of funds etc
- Have an Annual Report ready just in case
- Detailed project plans, if needed



Stewardship

- Whose responsibility is it in your organisation?
- Have you got a written plan for the next year?
- Are there naming rights?
- Is there a plaque – and whose responsibility is it?
- Is your CEO involved and doing his/her part of the stewardship?



A little break!

- See if you can identify with this....



Some practical points

- Keep careful and detailed notes on all meetings so that you know what you have done, what you have promised and when you have to deliver.
- Make sure the notes (even if briefer ones) are entered up into the database so others can see what is happening.
- Be clear before the meeting what you **MUST** achieve by the end of the meeting.
- Set a date with the donor/prospect for the next 'contact'; repeat the date; check both of your diaries; reconfirm verbally.
- Within 24 hours write/email to confirm the details of the next appointment.

Prospect tracking

Prospect Details		Activity	
Appeal:	Major Gift	Staff 1:	Watkinson, Alan
Fund:	Young Leaders Summer Sch	Staff 2:	Cooper, Astrida
Status:	Solicitation	Volunteer 1:	Not Selected
Primary Only:	<input type="checkbox"/>	Volunteer 2:	Not Selected
Capacity:	50000.00	Comment:	Alan has made a pledge of \$50,000 in total. The first part is to pay for the intern position in 2010, and thereafter the AG amount is for the BAG and the rest for YLSS. Any balance outstanding as and when Alan finishes at Trinity will come in the form of a bequest.
Indication:	50000.00		
Inclination:	Pledge/Gift Made		

Activity tracking

New Activity: []

Activity Details

Date: 11/02/2011 Primary Only

Appeal: Major Gift

Activity: Meeting Status: Waiting for someone

Follow Up: Follow Up Date:

Comment: Trying to confirm date for next meeting with Alan's PA (Astrida) for 7 March. Follow up on 19 Feb. ARW

Prospector: McGowan, Andrew

OK Cancel

Status	Prosp ID
	0

Add
Modify
Delete

Keep Criteria... < Back Next > OK Exit

Some more practical points

- When the ask has been made and agreement ‘reached’...
 - Confirm verbally what the agreement is
 - Confirm verbally what commitments are made by both sides
 - Confirm verbally what the next step(s) are for both sides
 - Set the next date – FOLLOW UP
- If no agreement has been reached (remember this is not a NO!)...
 - Confirm if more time is needed to consider
 - Fix a time for the follow-up meeting
 - Ask if there is more information needed
 - Fix a time to provide and follow-up
 - Find out if perhaps someone else should be involved
 - Fix a time to follow up

It's about trusting and sharing!



Don't be selfish

Share information

Trust your team

and above all...

Never, ever, (ever) lose focus!



Over to you

- Any follow-up questions?
- Contact:
 - alanw@trinity.unimelb.edu.au
 - (03) 9348 7116
 - www.adape.org.au
 - adape@adape.org.au
(CEO, Michele Dunn)



INSPIRED
FIA's 34th International Fundraising Conference
 MELBOURNE CONVENTION & EXHIBITION CENTRE
 24 - 27 February 2011



Conference Partner



Principal Sponsor



Major Sponsors



Media Supporters



National Corporate Partner



National Principal Sponsor

FIA Corporate Supporter



Awards Sponsors

