

## DAY 6 – Engage with a (potential) donor - Transcript

Hi, welcome back to the Focus Action Week Building better relations with your donors. Today, we are at day 6 and we're going to engage with a donor, a potential donor or an existing donor. And I'm just going to say hi, because I'm sure that by now we have met in the Facebook group. If not, then you can still jump in and join us there for the final days of the Focus Action Week.

And I would invite you to really do that. But I do want to take a few moments to make sure that we are in the right frame of mind, that we feel the right context for the actions that we're going to be taking today. So why are we here? We are here because you have a dream to make this world a little bit better in one location, for a certain group of people, for maybe a piece of nature, for some animals, for an area, maybe for a concept like human rights, whatever it is, you have a dream to make something better in this world. And in order to achieve that dream, you need to do things, you have work to do. And in order to do that work, you need resources.

And to find those resources, you need to have a pool of donors, grantmaking, donors, sponsorship, donors, or private individual donors who support you so that you have the resources to do your work and achieve the mission. And donors will provide you with those resources. If, of course they share your dream. If they agree that the thing that you want to improve or protect is something that they care about as well.

And then of course, in addition to an alignment on the level of dreams, they need to, first of all, Know that you exist and they need to Know that your dreams are aligned with theirs. But they also need to Like how you do this and how you communicate about it. And they need to Trust you. And this Know, Like, and Trust, KLT, takes time to build and maintain.

And we have been talking about this the whole week already. This is not just a one on one contact that we're talking about, but over time that can grow into quite a sizable number of individuals who are either contact persons for you in a company, a private foundation, or a government organization that is giving out a grant or sponsorship. Or private individuals who are donating as private persons.

So you will have quite a sizable number of people to deal with, either individuals who are representing themselves, or contact persons who are representing some organization. And you're going to be in need of having a variety of types of donors, grants, sponsors, private individuals, and quite a few of each type. So that means you're going to be looking at quite a few and quite different types of relations with people with different backgrounds, outlooks, talents, maybe focuses and so on. So this is why we are in need to invest time in working with donors and in working with a variety of different people on that. And we also know that this is something that takes time and attention and intention, systematic work, but we also know that in nonprofit life, there is always the thing that happens today or that deadline that happens tomorrow.

And it's very difficult to focus systematically and consistently on working with your donors. So this is something that sometimes we invest in it for a short period of time, like, hopefully this week, very intensively, but then other things take over and we forget about it a bit. And that's not going to be helpful to you in the long run. So that's why I host this Focus Action Week so that we can build a routine together, where you are working, at least during those seven days every day on this and where you will plan, hopefully, a routine for the period after this week, building on some of the little routines that we are going

to, that we have been building, I should say, during this week. Because not only are you spending consistently time on thinking about your donors this week, if you have been watching the videos and doing the assignments every day. But also you will have seen that some of those assignments are repeating. And that's of course how it should be in real life after this week is done, too, that you do something every day to reach out to at least one donor. So we are already building that routine this week and you will have time tomorrow to plan for that to continue after this week.

So what we're going to do, you know that by now, because we have done almost everything. We have been looking at the basis. So who are your donors? We need to understand your donor so that we can understand what kind of people we are looking for if we want to find new donors. But also we need to collect all the information that you have about your current donors.

So that we can communicate with them in the best possible way, including making sure that we are thanking them on time for any donation that they may have done. And maybe that we celebrate them if they cross a certain donation threshold. If you see that they have donated 10 times, you can send them a special thank you.

If you see that they have donated in total, I don't know, a hundred dollars, then you can celebrate that as well. So make sure that you collect that kind of data about your donor so that you can also celebrate them being a donor and that way, give them positive encouragement to stay. So there are two reasons why it's important to collect data about your current donors and understand who they are.

The other basis that we have worked on is your communication platform. So we have been reviewing your communication platforms, like your websites, your newsletter, your social media presence, because these are usually the first point of contact between you and a donor, or maybe the second point of contact when they're going to verify some of the things that you said after they have met you or after they have received your first project proposal.

So these are going to be providing the first impression for your donors. And we want to be sure that they find clear and attractive information that is helpful to them to understand what you're doing, to get to know you, to get to like you and to get to trust you. And of course, we want to make sure there is a red carpet there, that they can walk on to reach the stage of donating money to us. Right? So that's important in looking at your online presence to see if that is all clear. And if it's also clear what you would like people to do, how they can support you. Then we have been doing some repetitive tasks on drafting messages, sending out messages and checking responses.

And we have been looking at finding new donors, that was yesterday. And today we're going to be looking at engaging with donors, maybe one of the ones that you found yesterday or an existing one. And then tomorrow, you're going to plan for your routine after this week to continue with those actions of making sure you know, who your donors are and what they have done for you, you will continue to review your communication platforms and you will continue to send out, to draft and send out messages daily. And of course, you're going to continue to look for donors and engage with donors also very regularly, hopefully daily. So that will be your task for tomorrow. So today we're actually going to be doing the final step, the engaging with donors. And then just a reminder.

This is almost the final reminder: tomorrow, Sunday, the 4th of July, you will receive the final email with me with the link to the final assignment. And after that, you still have Monday, Tuesday, Wednesday to finalize everything and to share in the Facebook group your questions and your insights. And then after the 7th of July, I will take all the materials offline.

So please make sure that you download everything that you want to keep from those assignments, worksheets, audio files, et cetera. And I will also archive the Facebook group. So you can still search there, but you can no longer post there. So I just wanted to highlight that again, because it might be a nasty surprise for you.

I don't want it to be a nasty surprise for you, but we are here to have one intensive week together. And we all know that you cannot have 52 intensive weeks in one year. So we're going to make sure that there's an end to this week as well. And that will be after 7th of July. Okay. Let's now finally get started. As I said, today we're going to do for the first time engagement with donors. Well that might not be for the first time for you, of course, but for the first time in this week. And we are going to do another round of sending out a message because you have been drafting a message yesterday. So there are two yellow highlighted areas of work for us today. And there is quite a lot of green there for things that we have already done.

And some of them, of course, already more than once, like drafting a message. So we're going to be engaging with a potential donor or an existing donor. Let's not forget that. Building relations with donors is not only about new donors. It's also about making your current donors feel happy that they are part of your organization. And that they're part of this dream.

So that's what I want to highlight first. And then this saying is always very good to keep in mind. If you always do what you've always done, then you always get what you've always gotten. So in this week, hopefully you have done a few things that you haven't done before, or maybe you have done some things in a different way from how you did them before.

That might be a little bit scary. You might think. Hmm. I've been doing it a one way for yeah, for forever. And why should I change that? Well, that should probably change because you might not want to continue to have the same result that you already have. If you want to grow your donor database, maybe from a zero to one or two or three, or maybe from one hundred to 1000, then you need to do certain things in a little bit different way, of course. Right? So that's something that that I want to highlight here. And that's super important when we're going to look at engaging with a potential donor. So how do you engage? What do you do? That's something where of course you can experiment a lot with different approaches and where it pays off to try different ways of engagement.

Let's go back to what I said before. So when we're looking at building relations with donors, we are looking at finding new donors that suit us, that are good match with your dream and with your approach how work towards the dream. But also it means that we are building relations with people that are already in, so to say, your current donors. Make sure that your current donors stay, that your retention rate of current donors is high, that you don't have a donor coming in, making a small donation and then losing interest because maybe they never hear from you again, maybe they feel that you are not appreciating them because maybe they didn't get a thank you note.

Or maybe they feel that the information you are giving is not really tailored to what they're interested in knowing. Make sure that the donors that you have, that you worked hard to get, that they are interested in staying. Make sure that they're happy, make sure that they get the information that they're interested in, that they hear from you regularly, that they are maybe acknowledged on your Facebook page, that they are thanked maybe also individually in a phone call, in an email and maybe even in a handwritten letter. Just make sure that your current donors feel that they are important to you and that they are part of your dream and that you are part of their dream. And that's super important because of course, first of all is very important that they stay. Because if every time you need to find new donors then it's very difficult for you to grow the number of donors in total, if you lose them all the time. So first of all, it's important that they stay. That of course also helps a lot with your image. Because if people are leaving almost as soon as they come in that also doesn't create a nice picture about your organization's care for those donors.

But also of course, happy donors may grow in a sense that they might be able to donate a little bit more after some time. They might be able to donate maybe more frequently, maybe first they start giving you something once a year, maybe then they can go to a once a quarter, then to once a month, maybe they can grow from \$5 to \$6.

It might not sound like a lot, but if you have a lot of donors increasing their donation from five to six, then still it adds up. And of course happy donors may also help you. They might become a volunteer. They might be an ambassador. They might mention you to their friends or business acquaintances, and that way they can help you grow your network.

And maybe they can help you that way find new donors. So it's all about relation building with the current donors as well. And please never forget about that. But of course you're here because you are also very keen on having new donors or finding people or organizations that could become a new donor or that could become a new grantor to you.

So what is important then is to make sure that you find out more about them, right? As we spoke about on day 1, you need to understand who your donors are, what makes them tick so that you can understand what is the best way to communicate with them. If you know that they're interested in something specifically, or that they are using certain words to speak about that interest, then you know, what words to use so that they will recognize that you and they share something. So you need to find out information so that you can find something that will help you get a way in with them in terms of communication, so that you can speak to them in a way that they really will hear it, that will resonate with them. So that's why it's super important to find out as much as you can about your new or potential donors. So you need to find out about what their dreams exactly are, their interests, or maybe if they are an organization, a company, private foundation, or a government organization, you need to figure out what their priorities are, whether they have certain strategies around those priority themes or priority areas, et cetera, et cetera. So you need to find that out. And as you see, it's the same for both private individuals and organizations. They have dreams although in organizations, those are called of course, policies, strategies, priorities, but it's basically about dreams. What do they want to achieve?

What is important to them? What are they willing to invest in or wanting to see change in? And then you need to also think about finding out about their style. So what are the kind of the words that they use to talk about their dreams or their policies, their priorities, how do they do that? Are they very formal or not. If you make a mistake there, if you write a very popular style message to somebody who is very formal in their

communication, then there is no match. Even though maybe your dreams might be aligned, but then the way that you write will not really speak to them, right? They will not feel comfortable reading something that's a very different style and vice versa too.

If there's somebody who's very informal and you write a very formal message then it creates a distance, and then that might also not speak to them. So it's important to learn about style and preferences for communication and presentation, kinds of words they use. How do they speak about these issues themselves? Also see what kind of activities they're doing, maybe what kind of opinions share and maybe see what kind of updates they have. And if they are organizations, then maybe those updates would include things like deadlines for applications. So you need to find those donors online and follow them in some way so that you can learn about all those things. That could mean that you are liking the Facebook page of an embassy in your country or a private foundation that's supporting projects in your country or a local company, or maybe another non-profit organization, an international nonprofit organization that's working in your country on the theme that you also work on. That's one scenario, or it could be that you join an interest group on Facebook, for example, could also be on LinkedIn, of course, where people are talking about, for example, nature walks. Maybe you're working in nature conservation, and you find a group of enthusiasts who are interested in walking, in outdoors activities. And that might be a place where your ideal donor might be in hiding, so to say. So you might find potential donors there, people who are interested in outdoor activities or people who are interested in beautiful nature, but it could also be people who are interested in photography.

So there are all sorts of groups on Facebook and on LinkedIn too, of course, and on other platforms where you can find people interested in a certain topic or activity, and that could be something that has a link with the thing you work on. So you could also see if you can join such a group and then learn about those people by just observing in that group what's happening, what they're talking about, what they're sharing, how they're talking about it, how they're sharing things, et cetera, et cetera. And this is important to start first finding them and following them, learning about them. And then based on that, try to engage with them in their domain. So by their domain, I mean their Facebook group, their Facebook page, their website, their Instagram profile, wherever you have found them. And learn about them, engage with them there. So maybe share something that they posted there, comment on it, et cetera, et cetera. Engage with them there so that they see you popping up there. And of course, if we're talking about a big organization, then probably all these things are done by a communication department in that organization. So that might not necessarily mean that the people that you need to talk to in the organization are seeing right away that you are commenting there. So it starts with engaging with them in their domain, and that might help them see that you exist. But of course, when you're dealing with a bigger organization, then it might take more time. And it might take some extra steps because you might at first be noticed more by the communication department than by maybe the program managers who are working on programs where you might like to apply for a grant. So again, we're back to the same old story. It takes time. It takes persistence and consistency and a systematic approach.

And then what you also will want to do is to make sure that while you are learning about them and engaging with them, that you try to find a hook. That you try to find something that you can use for communication outside of their domain to build direct relations in another platform, which is maybe your platform, like email WhatsApp or a personal meeting, something like that. So what you're trying to do is to learn about them, to engage with them on where they are, where are actually inviting you to engage with them. And then see if you can find something that you can use outside that. So maybe after a while you see a certain post and you think, wow, that's interesting.

And then you maybe write to somebody in the organization saying, oh, I saw this. I've been following your activities for a while now. And I saw this post on Facebook or on Instagram or on Twitter or LinkedIn. And I'm really interested in hearing more about what you're doing on ABC, because we are working on ABC, too, something like that.

So then you need to find a way how to hook yourself to something that they are communicating about and how you can use that to go outside of that public platform into a one on one platform. That's the next step. Okay. So what are we going to be doing? Well, you're going to be sending one message to a current donor because that's what you have been working on yesterday, right? Or you're going to post this on your social media profile in case you don't have any donors yet, but you have written hopefully something yesterday. So you wrote something yesterday and today you're going to send it out into the world. And the instructions of day 4 are copied in the worksheet of today so that you can just follow the instructions there in the same worksheet.

And then, for now, I would say pick one of the donors that you found yesterday. Even though it is important to make sure that you also do the steps that we just looked at with your current donors, whether they're private individuals or organizations doesn't matter, but let's for today, focus on one of the new ones.

So that we start working on those. And then see if you can find them online and follow them. So that means maybe finding their website, maybe they have a website where they post regular updates, see if you can get a feed of that. So that you get notifications if they post something new. See if they have a newsletter that you can subscribe to, for example. And then see if they have a social media profile. And then I would suggest that probably they might have a profile, if we're talking about an organization, they might probably have a profile on different platforms. And then I would just pick one of those platforms and pick the one where you are the most comfortable, where you are most present yourself as well.

So if you're very active on your Facebook page, then I would pick their Facebook page to follow as well. Because then if you are linking back to your own page, or if they, if you are commenting as your page, then if they follow you back or if they look you up on that platform, then they will see something where you have activity.

So if you are not active on Twitter and you're following them on Twitter, then if they look you up there, then they will see nothing. So that's not nice. So pick your profile where you are active as well and follow their profile on that platform. And then see what they have been posting in the past seven days, depends how active they are.

Of course, if they're super active posting five posts a day, then I would maybe do a little bit less than seven days. If they post only one post per day then I would maybe do a bit more. So I would try to read through a consistent period of let's say between one month and seven days, depending on how much they post and how much time you have just to see what kind of posts they do and how they do it.

And keep in mind that you're interested in learning about their dreams, their priorities, but also their style, their kinds of activities that they're doing or supporting, et cetera, et cetera. So there's a lot of different perspectives on them that you want to look at. And that's why I would recommend at least seven days, maybe up to a maximum of a month to keep it doable.

And then note any issues of interest based on the areas that we're interested in. And then see if there's one post that you could share or like, and respond to. And do that. So it might be sharing, it might be liking and responding. It might be all of them, just pick one post to share, like, respond and do that.

And then pick one piece of information, this hook that I mentioned, to use for future communication with them and see how you might use that in a conversation or a private message. So this is the step where you're going to try and find something that gives you a reason to move from a public platform, which is their platform, to a private platform for a communication between you and them either because you're meeting them in person or because you are sending them an email or something like that.

So this is where you're going to try to go from research phase and public engagement phase to a private relation building phase. And when I say private, I just mean one on one and not of course intimate or anything like that. Still, this is all professional. Keep that in mind. And of course, I want to highlight that when you are looking for a hook to find a way to enter into one-on-one conversation, that doesn't mean at all, that you should not continue with the public engagement. So you should continue with the public engagement and at the same time, try to move the relation outside of the public domain. And that's important to keep in mind because you are building relations.

So that means that you need to go one on one. At the same time, you also are still looking to continue to understand that donor so you still need to continue to collect information about who they are, what they're doing. And of course, that will feed into the one on one relation as well. And the same is true for when you are looking for private individuals and you are maybe joining a certain group on LinkedIn or Facebook, for example, where people are exchanging on a certain hobby or professional interest or activity. So there, too, you are just going to, first of all, observe. So you're first of all, going to find a group and you're going to join that group if you can. And then you're going to observe by checking the posts that are done in that group, with that hashtag, or whatever it is in the past periods. And depending a bit on how active the group is, whether that should be a month or seven days, same as for a company profile or organizational profile. And then note, what you see that is of interest and then choose one post where you can share, like, and respond. And maybe also do an introduction of yourself.

You wouldn't do it on a page of an organization, but if you're joining a group, then they probably will invite you to introduce yourself. So then make sure that you have a clever way of introducing yourself that isn't looking like a sales pitch, but where you find a way to highlight your expertise through your work and how that links to their interests, their hobbies, their professional interests. And then pick one post that they made where you can respond and maybe share a piece of information or experience that you got through your work. And then see if you can find something in the posts in that group that can help you find a way to start a conversation about your own activities. So that might still be inside that group for the moment and not outside, but you might, for example, if you have an event coming up, you might post an announcement of that, if the group rules allow it. Please check that the group rules allow it. And if you're not clear about that, you can ask the administrator of the group, whether you can post an announcement of an event, which you think might be of interest to the members of the group.

Maybe you're doing an excursion into a certain nature park. And if you're in a group of photographers you could say, well, it's going to be a super nice excursion there, and we're going to be showing some very

special plants or animals, and you can take pictures there. Or it could be maybe you're in a nature education group or in some other group.

So find a way to link maybe an activity that you have or a publication that you have, and to see if you can share that in the group if there is a clear link of interest there. So there are lots of ways how you can do that. I'm not going to give all those examples here, but I'm looking forward to hearing from you about that in the Facebook group.

And then of course I will for sure respond and maybe share more ideas there. So that's what you need to do, whether you're going to follow somebody on their own organization page, or whether you're going to join a group to find there private individuals. And share, that was my last thing that I already said, share in the Facebook group, what you have done, what you plan to do and any questions that you might have about this. Because in the Facebook group, we are all your colleagues, right? So we're all the same there. And answers can come from many of us who are there. And also it would be super interesting to maybe get answers from you on some of the questions that are posted there.

You have your own experience, your own expertise, that we're also interested in learning from in the group. So please come to the group and share your questions and your expertise there. And of course, I'm very curious to learn about your steps taken today. So I'm really looking forward to see you jump into our group. And I will say bye for now and see you tomorrow.