



# From the Mailbox to the Living Room – *Creating an inspiring donor journey!*

Monday, April 17 8:00 AM – 9:15 AM

Nancy Gerard, Marcy Heim, Tim Logan



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Let me HEAR YOU!

*"Something good is gonna happen to me!"*

Joyce Meyer

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# TELL us about you!

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# Let's Start a Relationship!



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Why do  
people  
GIVE?

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The BRIDGE between  
Direct Response and a  
Personal Relationship

What we would  
LIKE it to be...

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# The BRIDGE between Direct Response and a Personal Relationship

## What it is....




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# 5 Keys to creating an inspiring donor journey



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# Key #1

## The Words We Use

Creating a genuine culture of Generosity

Using data analysis and enhanced data to identify and segment for major giving results

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"I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel."

Maya Angelou

How do you want your givers to feel when they hear from you or are with you?

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All we want to know is.....



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Let's begin with the Direct Response Side (this should be familiar to you)

### Session Objectives

- Bridge direct mail transactions to help you generate more major donors in your annual fund
- Using data analysis and enhanced data to identify and segment for major giving results



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The Development Gap®

Uncomfortable Bedfellows

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Key #2  
YOU and your mindset  
(and love.)

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# “We become what we think about!”

Earl Nightingale, *The Strangest Secret*

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## The Direct Response Value Thread

- Build the bridge in your messaging.
- “If I am a 60 year old with a \$7 million estate—I need to know my \$7 million will be put to good use—or I will give it elsewhere. They need to show me that they know me.”

Kay Sprinkel

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BUT...that mindset is on two levels

- self beliefs
- process beliefs

AND...very different between direct response & major giving folks



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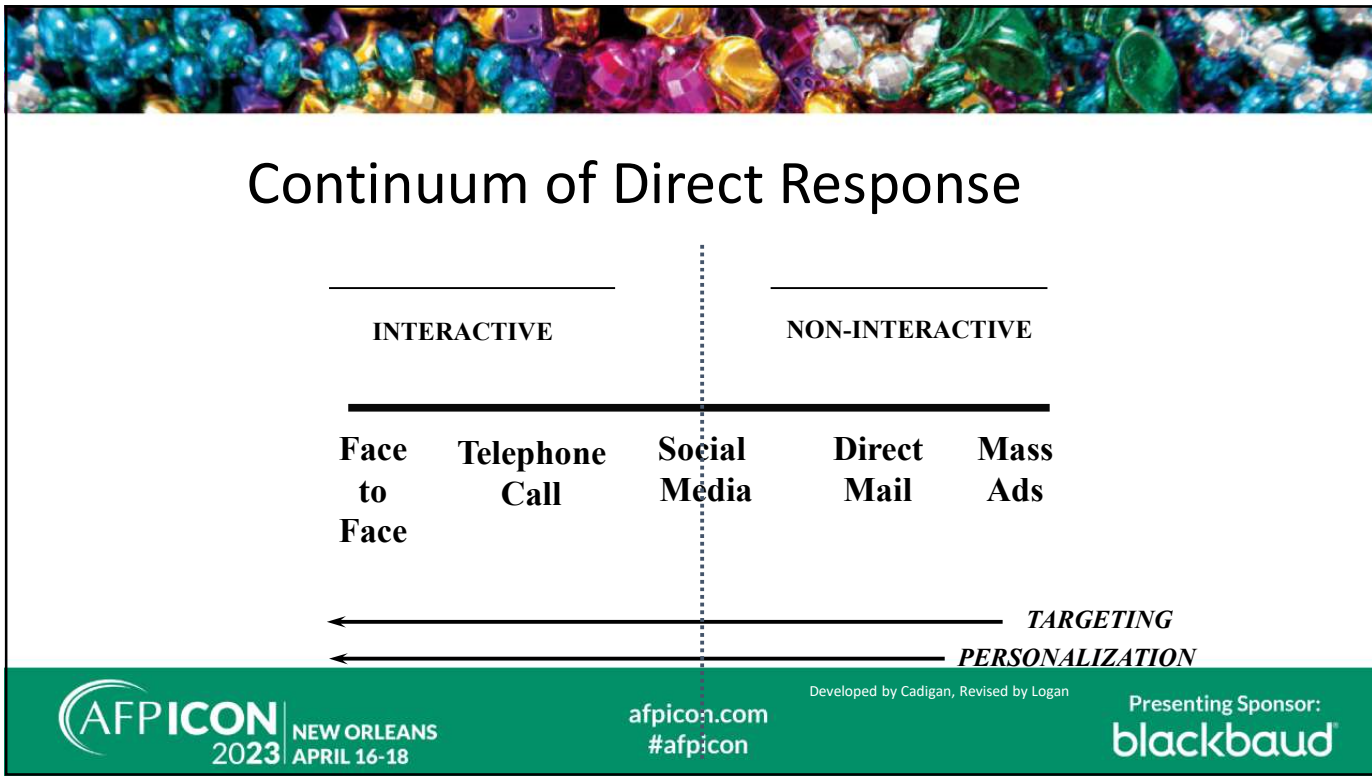
90% of your success in  
creating an inspiring  
journey is YOUR beliefs and  
mindset.



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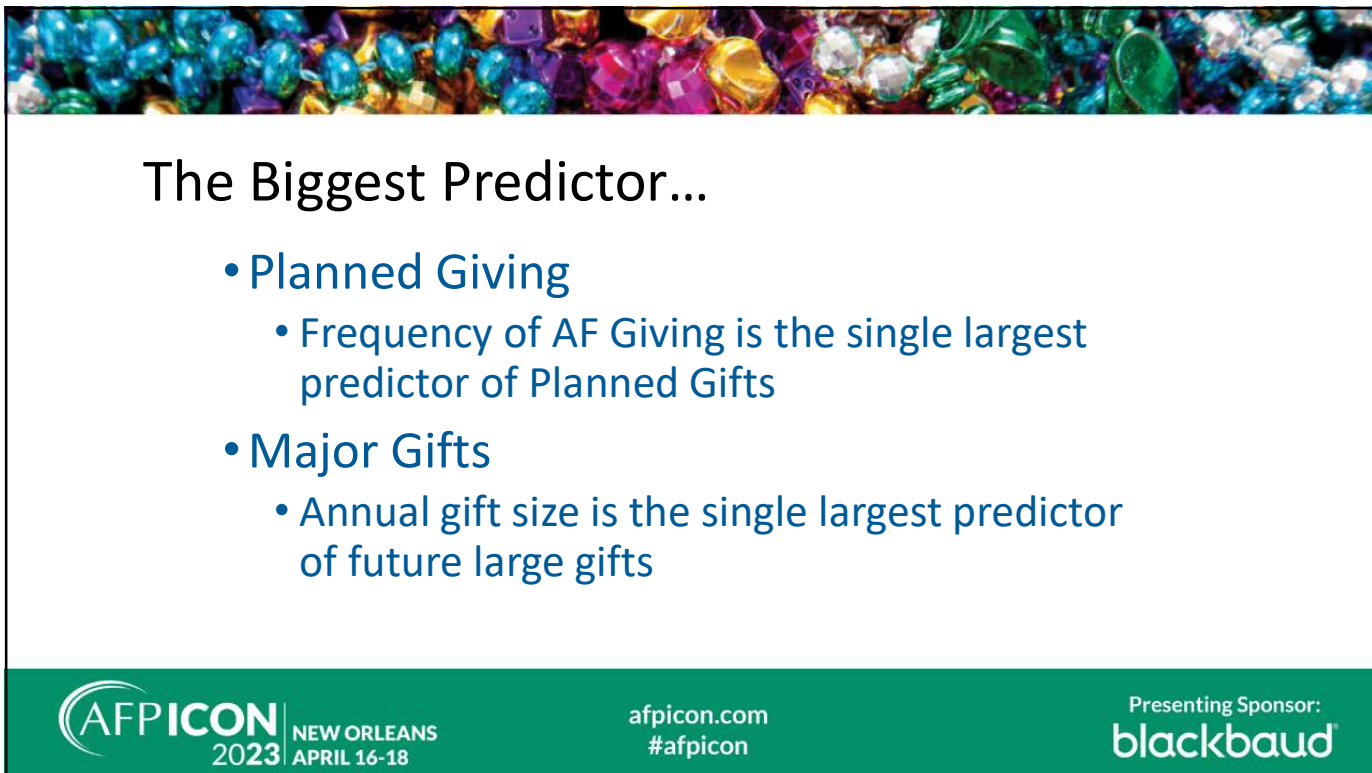
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The diagram illustrates the 'Continuum of Direct Response' with a vertical dashed line separating 'INTERACTIVE' on the left and 'NON-INTERACTIVE' on the right. Below this line, five categories are listed: Face to Face, Telephone Call, Social Media, Direct Mail, and Mass Ads. Two horizontal arrows at the bottom point from right to left, labeled 'TARGETING' and 'PERSONALIZATION'. The footer contains the AFPICON 2023 logo, event details for New Orleans (April 16-18), website and hashtag information, and the Blackbaud logo as the presenting sponsor.

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The slide features a decorative border of colorful candies at the top. The main heading is 'The Biggest Predictor...'. Below it, two bullet points are listed: 'Planned Giving' and 'Major Gifts'. Each bullet point has a sub-bullet: 'Frequency of AF Giving is the single largest predictor of Planned Gifts' and 'Annual gift size is the single largest predictor of future large gifts'. The footer includes the AFPICON 2023 logo, event details for New Orleans (April 16-18), website and hashtag information, and the Blackbaud logo as the presenting sponsor.

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What are YOU thinking about wealth and Money?


PEOPLE LOVE TO GIVE ME MONEY!

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"It's not about the money, it's about what the money does. Really does." *Marcy Heim*

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## Key #3

Create a partnership  
with your authentic  
**FOCUS** on the giver.

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## What's the **GOAL** for your giver?

Get their  
**MONEY,**  
**YOU**  
**IDIOT**

OR

“Making this  
gift was the best  
thing I ever did.  
What's next?”

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PROSPECT IDENTIFICATION

QUALIFICATION VISIT

Shared values and interests

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**To Develop the Major Donor Annual Fund Segment**

- Search for donors to the annual fund who have give consistently at higher-than-average amounts. For example, an annual gift of over \$500
- Develop a Mid-level and *Major Annual Giving* program,
- E.g., annual donors in amounts of \$1,000 or more go into a special program.

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## Crossing that line from Transaction to Relationship

1. What exactly do you say/do to get that first appointment
2. 6 tips to grow the relationship in the first/early visit

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## These have BOTH a transactional and a relational cause and solution.

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# Key #4

## Sure ways to sabotage your relationships.

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## These have BOTH a transactional and a relational cause and solution.

### Eight Examples of Mistakes and how to fix them from real major gift call experiences.

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Dream with your  
giver! Big donors  
want Big Visions!

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Engage.... and engage  
....and engage with  
your givers.

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# Key #5

## Taking Action together.

### Your key takeaways!

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## Thank you and Questions!



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