



MPW
STRATEGIES

How to Get More Visits

Matt Wasserman
matt@mpwstrategies.com
(303) 912-0160


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John Pepperdine
john@mpwstrategies.com
(303) 229-6476

Matt Wasserman

- Founder & Principal MPW Strategies
- Fundraising for over 25 years
- CU Denver, Art Museum
- Spend time with the family
Skiing, hiking, camping

 www.linkedin.com/in/matthew-wasserman

 <https://twitter.com/immattwasserman>



www.mpwstrategies.com

John Pepperdine



- Principal MPW Strategies
- Fundraising whole career
- Large and small, multiple universities, and LOTS of causes and campaigns
- Off hours . . . Teenagers and Colorado “stuff”



www.linkedin.com/in/johnpepperdine



<https://twitter.com/johnpepperdine3>

www.mpwstrategies.com

MPW Strategies Background

- Raised hundreds of millions of dollars building and enhancing fundraising operations
- Comprehensive suite of fundraising consulting services that bolster nonprofits' ability to meet missions and propel positive change
- Models, approach, and systems to instill newfound expertise and confidence in you and your team's fundraising practices
- Culture and infrastructure enhancements to fulfill goals and mission for the long term
- Guidance to each organization's specific circumstances in a highly engaging, hands-on, specifically tailored approach

Our Clients



Getting the Visit

1. It's not about you and . . . No silver bullets
2. Perseverance
3. Contacting the right prospects
4. Know the prospect
5. Take a campaign approach – use all resources
6. Cadence of contact
7. Script it out
8. Extra Help

What Do You Want to Learn?

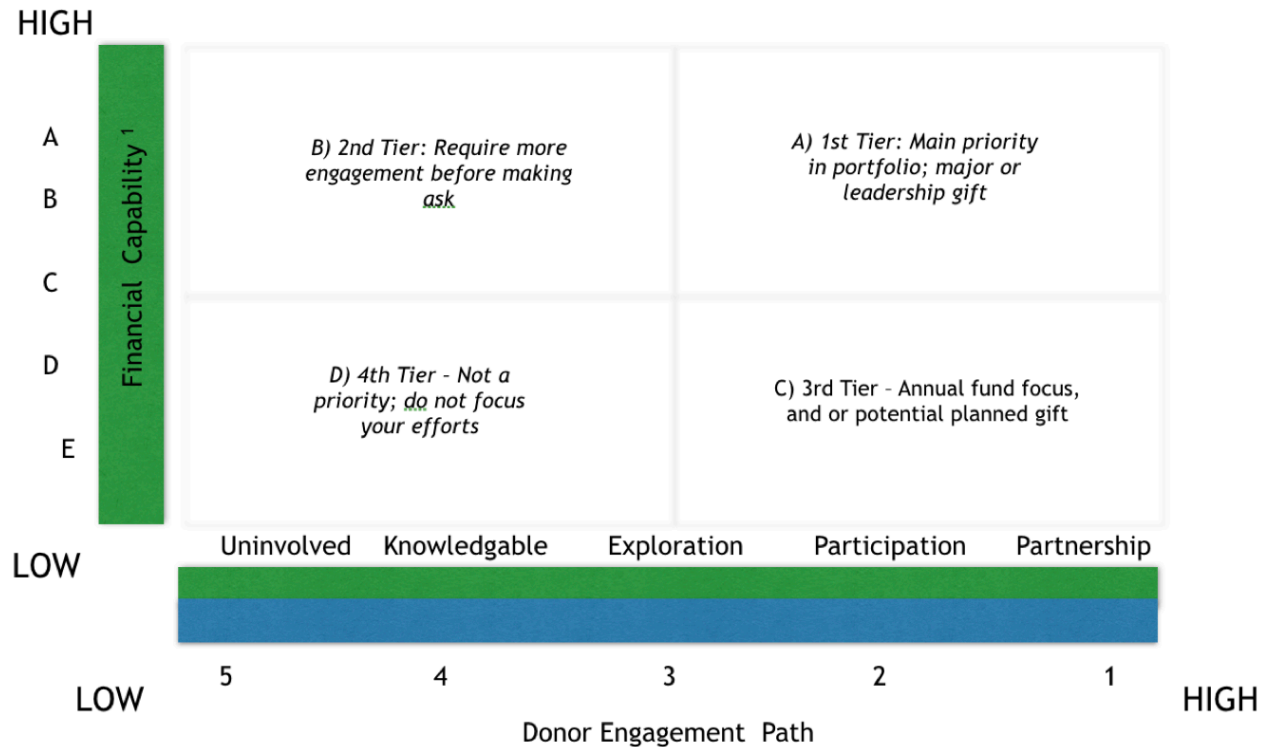
1. It's Not About You and No Easy Solution

- Be proactive
- Put your ego aside
- Don't take it personally
- Put yourself in the prospect's shoes
- They are NOT YOUR prospects
- It is about the donor and what they want to accomplish

2. Perseverance

- It takes time
- A lot of effort
- At minimum 4 contacts
- Don't get discouraged

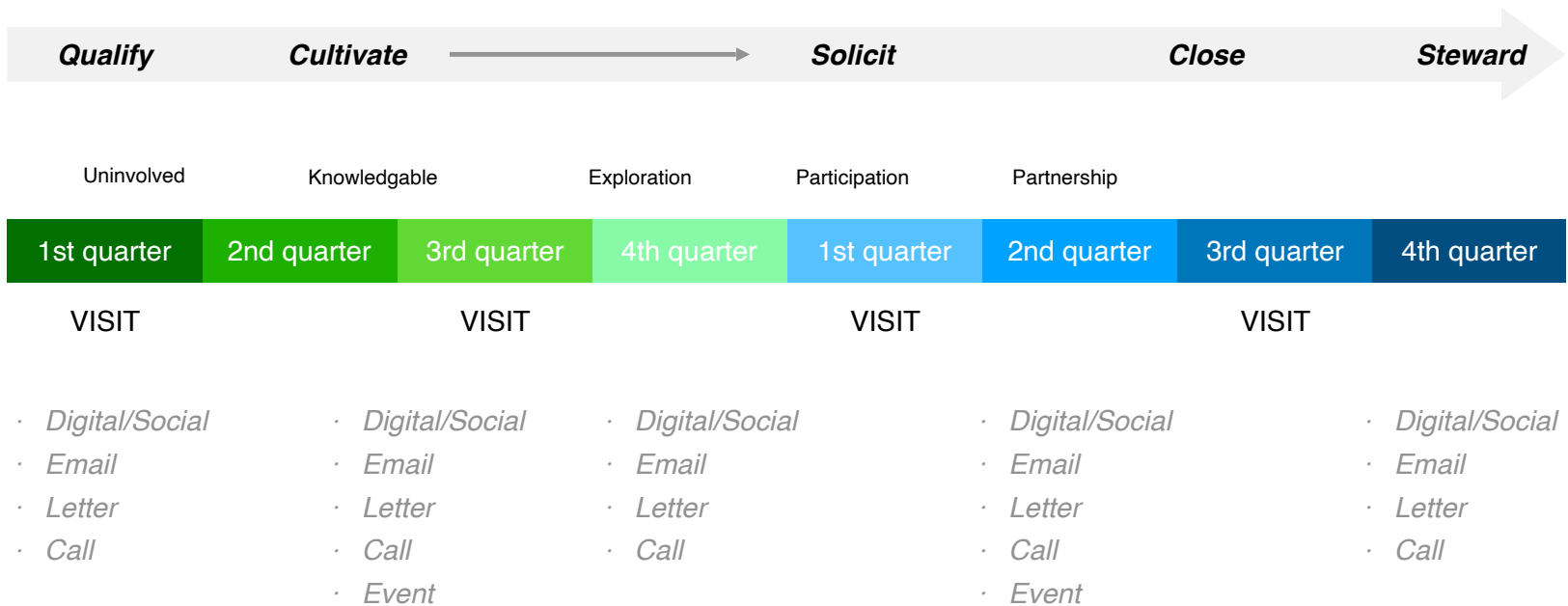
3. Contact the Right Prospects



¹ Next Ask Amount

A= \$1 million & above D= \$25K - \$99,999
 B= \$500K - \$999,999 E= \$24,999K & below
 C= \$100K - \$499,999

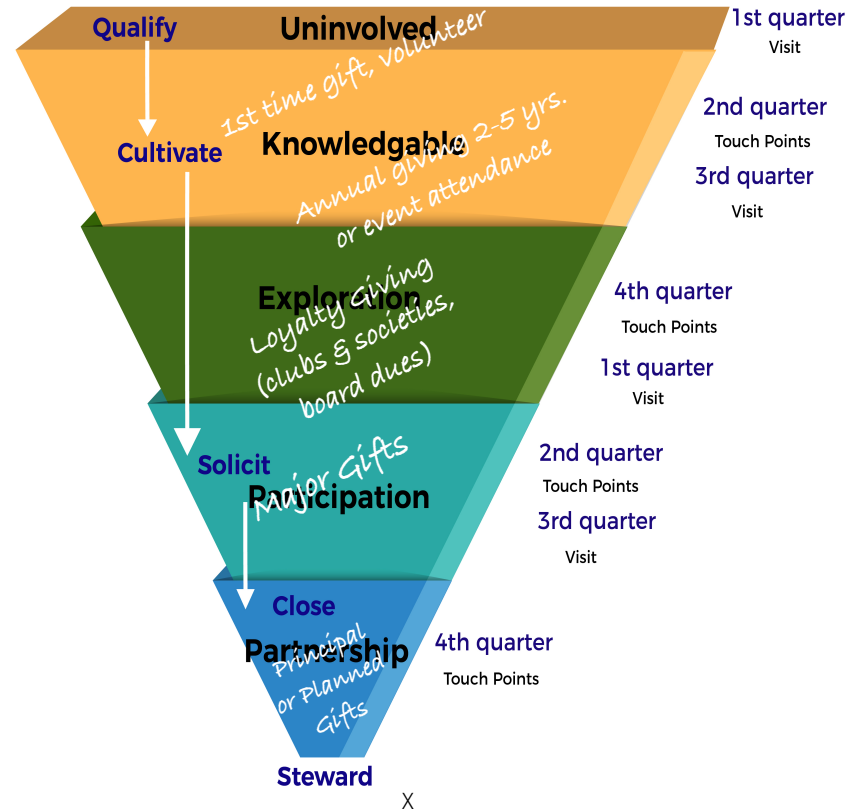
III. Building Engagement - The Journey



Contact the Right Prospects

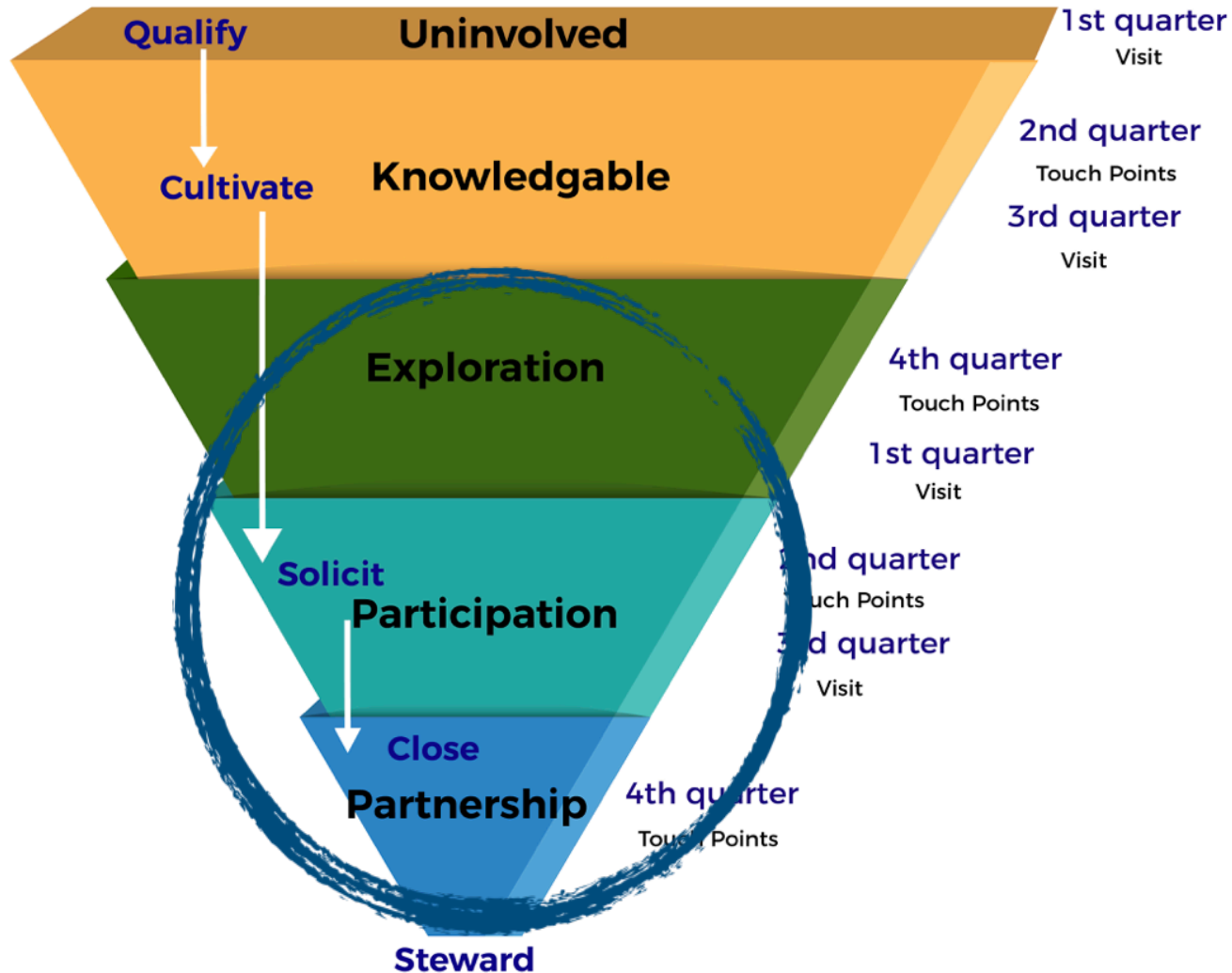


MPWS Donor Engagement Funnel



Contact the Right Prospects

MPWS Donor Engagement Funnel



4. Know the Prospects

- Past Giving
- Past Designations
- What is affinity to your organization
- Social listening
- Other connections to your organization
- Volunteer involvement
- Recent events in life
- WHAT ELSE?



Questions or Revelations?

5. Create a Campaign

- Utilize introductions and referrals
- Tours and get togethers
- Hand-written letter
- Social media
- Survey
- Offer something of value
- Include the executive assistant if applicable
- Don't pitch or sell

Introductions and Referrals

- Prospect Team
- Leader Exec Assist
- Volunteers
- Peers
- A connection at your organization
 - Faculty
 - Doctor
 - Nurse
 - Teacher
 - Case worker



Tours and Get Togethers

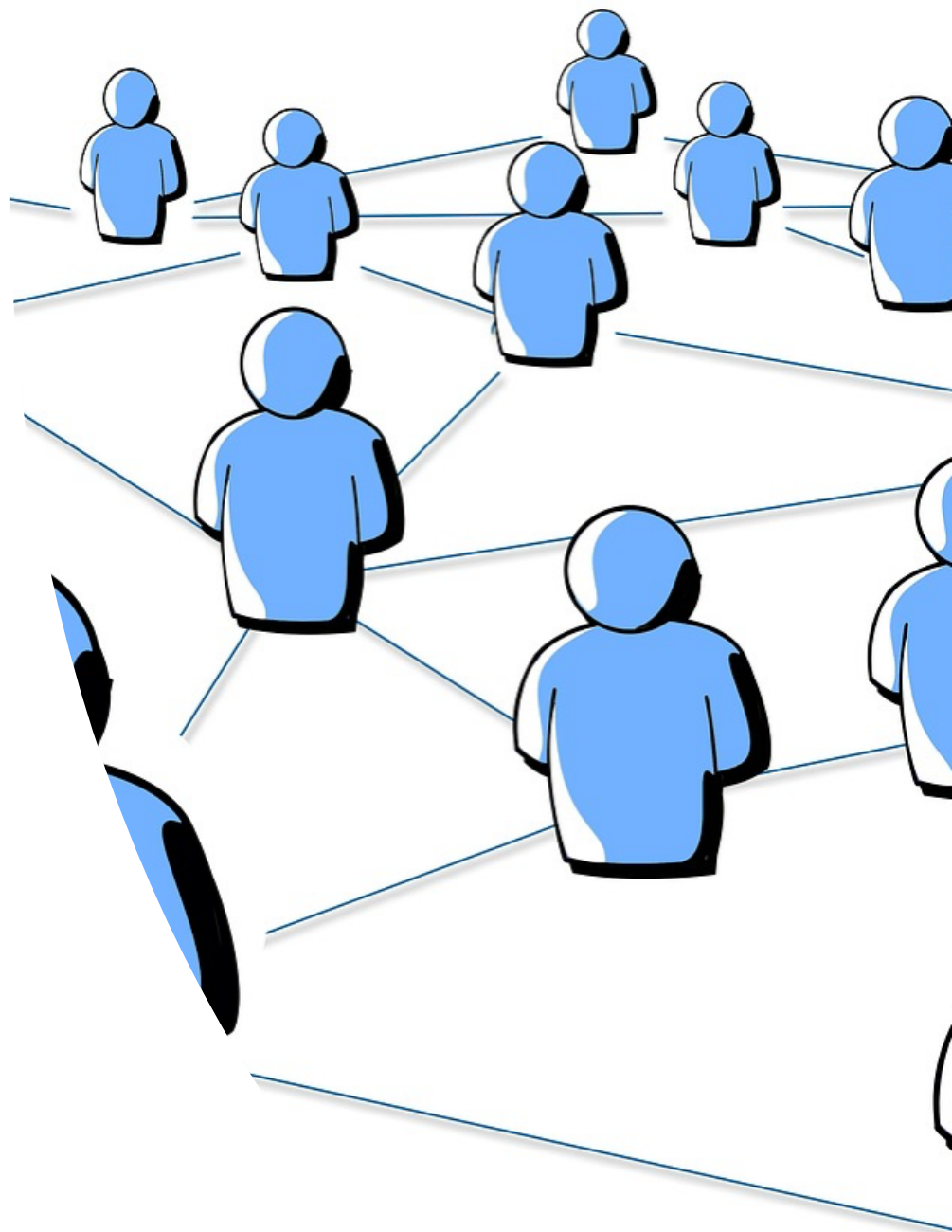
- Smaller tours held on a regular basis
- Hard hat tours if capital
- House party
- Make request to meet - Schedule at time
- Follow up after with invitation to meet

Survey

- DIY
- Survey your portfolio
- Identify interests
- Share the findings?
- Survey Monkey
- 10 questions
- Keep it simple
- A gift for filling out?

Social Media

- Social Listening
- LinkedIn messenger
- Finding common connection
- Introductions on LI



Share Something of Value



Report



Article



Update



Video

Questions or Revelations?

Cadence of Contact – Create Sequence

Week 1
Email

- Intro
- Background
- Invitation to meet

Week 2
Email

- Reply to message
- Ask for meeting

Week 3
Call

- Following up from email
- Might have gone to spam filter

Week 4
Email

- I understand that you are busy
- Ask should we take you off the list
- I don't want to do if organization is meaningful to you

Cadence of Contact . . .



Organize in manageable groups of 10-15



Keep it consistent



Use other channels (text, social (LI), events)



Build schedule in advance or use scheduling tool



Think about your energy level



Tuesday and Thursday morning and afternoon are best time to contact

- Sometimes it's Friday

Script the Outreach

Tactical

- Ask for the meeting
- Keep it short
- Thank for past support
- Subject line important
- Connect with prospects past involvement
- Utilize meeting scheduling software
- No Pitching!

Create Connection

- Do not persuade
- Seek to understand
- Demonstrate you have their best interest in heart
- Show it's all about them
- ***Deepen connection***

The email script

- Describe your role as seeking to deepen connections to --
-
- I would like to thank you for your past support/investment of _____
- Meet to understand your involvement with ----
- I'd like to update you on _____ and bring you news from _____
- Would you like to take a tour of ---- or meet in person
- I'm Interested in learning why you are involved with ----
- Please let me know your availability to meet

Subject Line Examples



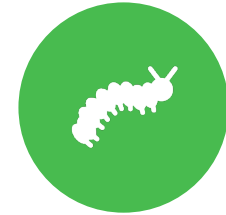
CAN I THANK YOU OVER
LUNCH?



CAN I TELL YOU ABOUT THE
IMPACT YOU MADE?



TIME TO MEET TO SEE HOW
YOU HAVE IMPROVED
LIVES?



CAN I TAKE YOU ON A TOUR
OF ---"NAME OF INTRO"
ASKED ME TO CONNECT
WITH YOU



OTHER IDEAS???

Use All Resources

- The "Team" for the prospect
 - Board members, volunteers, staff other donors
- Social media
- Stewardship
- Hand-written notes
- Text
- Scheduling tool
- Meeting scheduling software
- Events
- Tours
- Find out where they go and meet them there
- Other Ways???



*While there's no silver
bullet . . . we're excited
about this*

People + AI Working Together in Harmony to Scale

Your People



- Ideate **creative** campaigns
- Build **relationships**
- Manage and **close deals**

Your AI Assistants

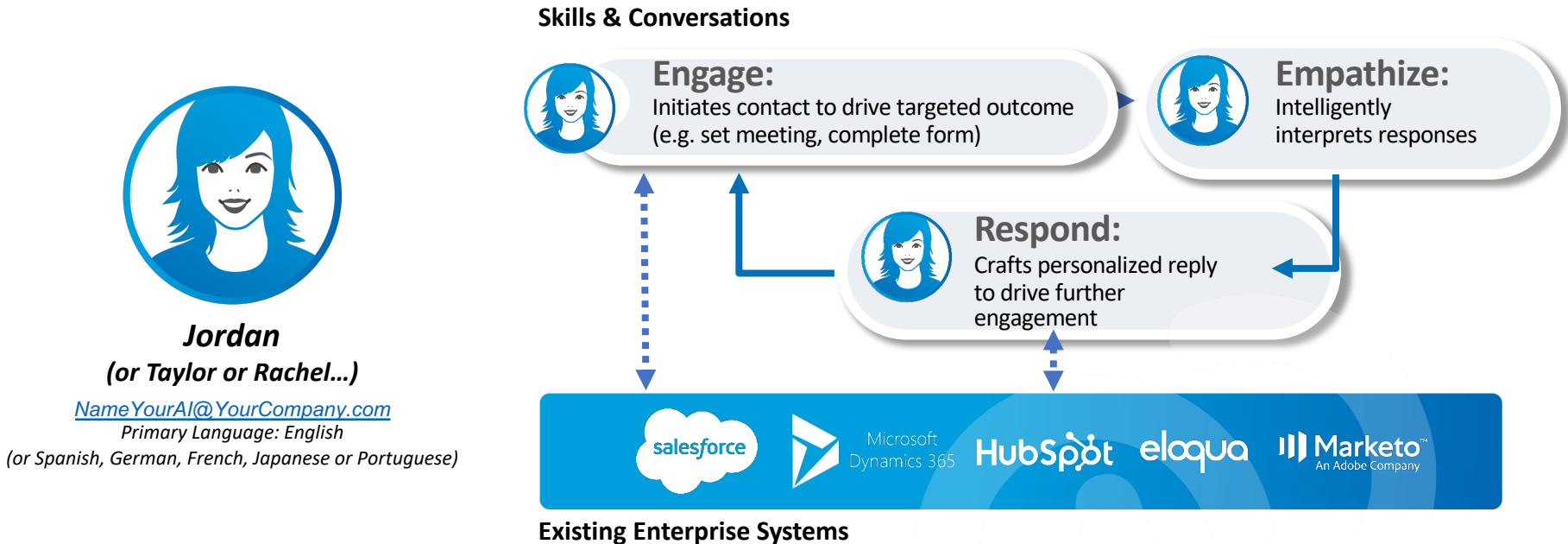


- **Scalable** and always available
- **Reliable** and **consistent**
- **Predictable** and **persistent**

AI does not replace People

AI Assistants augment the Human Workforce
to do what People can't do, don't do, or won't do, well

Engaging Contacts via Email or Text



Prompt, Personalized, Persistent and Polite Follow-up Machine – Literally!
No bad days. No sick days. No limits.

Ashley Engages with a Prospect

**Personalized
contact with
every lead**



Hi Bill
I see that you downloaded our free home training video
and would like to follow up to see if you have questions.
Would you like me to set up a call to learn more?
Thank you,
Ashley



Ashley,
I'm just trying it now.
I do have some questions and could talk to
someone.
Regards,
Bill

**Prospects engage in
two-way messages
with the AI Assistant
to discuss their needs**



Colby is working on this and would like to call you.
Is (650) 555-7821 the best number to reach you during days?
Ashley

AI Assistant hands off lead to account manager



No, I'm working from home so have him
call my cell at 650-555-2512.
Bill

**Prospects verify
contact information
and best time to call**



I just wanted to follow up and make
sure Colby got you all the information
you needed.
Did you connect with him?
Ashley



We are set for a meeting next week.
Thanks for following-up.
Bill

**Follow-up to
confirm successful
outcome**

Questions

