

Cheryl Balchunas' Discovery Visit/Qualification/Disqualification Presentation Highlights

Discovery Visits Key Phrases

- I'll be traveling through the (Denver Metro area) next week/later this month meeting with (CU alumni and supporters) and I'd love to see you as part of my travels.
- Here at (*insert name of organization*), we feel that it is of the utmost importance that we pause to express our gratitude to our supporters- so that's what I'm doing---thank you so much!
- I'd love to tell you how we put your gift to action and the impact it created.
- One of my favorite parts of my job is learning about what inspires people to give. I'd love to buy you a cup of coffee and hear about what motivated you to make this gift.
- I'd welcome the chance to talk with you about this initiative to get your advice and perspective on ways to ensure success, as well as gauge your potential interest in supporting the effort.
- I am presently working to connect with community leaders around the exciting happenings of (*insert the name of your organization*). In my conversations, you were suggested as someone that I should talk to.

Qualifying Questions

- Tell me about your (alumni/patient/volunteer) experiences with (CU).
- What motivated your gift and how can I partner with you around your future giving?
- Why do you give to ____?
- What are your goals in giving to us?
- What do you support philanthropically? What are your priority issues?
- Where are we on your philanthropic priority list?
- How much of an impact do you want to have with your giving?

I disqualify if/when:

- I'm unable to establish a clear next step by the end of the discovery meeting
- The person declined all future engagement opportunities presented (i.e.: event, lecture, tour)
- The person expressed a desire to not be solicited
- It is inappropriate to continue engaging in gift conversations
- Does not consider him/herself to be a major gift or planned gift prospect
- There's no response after 3-5 calls and emails in three to six months
- He/she voiced an interest to continue making annual gifts (via annual appeal) but declined opportunity to make a multi-year pledge commitment