

Discovery Visits & Qualification



Agenda

Getting the visit

Preparing for the visit

I got the visit! Now what?
What do I say?
What do I listen for?
How do I know when to disqualify a prospect?

Questions

Information I need before calling to request a discovery visit...

Idea of financial capacity

Affiliations/connections

Accurate contact information

Giving history to organization

My availability

Key Phrases

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 I should talk to.

I'll be traveling through the Denver metro area next week meeting with CU alumni and supporters and I'd love to see you as part of my travels.

I'd love to tell you how we put your gift to action & the impact it created.

Here at (CU), we feel that it's very important to pause and express our gratitude to our supporters- so that's what I'm doing. Thank you so much!

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 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.

Preparing for Visit



Craft 5-7 talking points

Identify 3 key things to learn during the visit

Connect with key staff/volunteers

Identify engagement opportunities & leave behinds


Confirm appointment

Purpose of the Discovery Visit

Cultivation/Stewardship

Identify engagement opportunities

Qualify/Disqualify: Is this person a major or planned gift prospect for my organization?



Qualifying Questions

What motivated this gift and how can I partner with you around your future giving in support of...?"

What do you support philanthropically? What are your priority issues?

What are your goals in giving to us?

Why do you give to ____?

How much of an impact do you want to have with your giving?

What do you want to do with the university?

Where are we on your philanthropic priority list?

Tell me about your alumni/patient/volunteer experiences with (CU).

What do you know about XYZ happening here?

Listen and Look for...

Signs of Philanthropic Passion

Signs of Wealth/Capacity

Engagement interests & possible future engagement opportunities

Signs of Philanthropic Inclination

DISQUALIFIED

IF/WHEN:

- ✓ Next step is not clear by end of the discovery meeting
- ✓ Declined all engagement opportunities
- ✓ Expressed desire to not be solicited
- ✓ Voiced interest to continue making annual gifts/decline multi-year pledge
- ✓ Does not consider self to be major gift prospect for CU Anschutz
- ✓ Inappropriate/unethical to engage in a future gift conversation
- ✓ No response after 3-5 calls & emails in 3-6+ months

Qualification/Disqualification Process

