Discovery Visits & Qualification

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

Preparing for the visit
- 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

Agenda
- Getting the visit
- Preparing for the visit
- Questions
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 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.

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.

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!

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...?
What do you want to do with the university?
Where are we on your philanthropic priority list?
What do you support philanthropically? What are your priority issues?
What do you know about XYZ happening here?
What do you know about XYZ happening here?
Tell me about your alumni/patient/volunteer experiences with (CU)

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