

# Getting in the Door: Prospecting and Cold Calling

presented by

Armando E. Zumaya

[aez2@hotmail.com](mailto:aez2@hotmail.com)

[www.armandozumaya.com](http://www.armandozumaya.com)



Armando Zumaya has been in fundraising for 30 years in a variety of roles that have given him a unique perspective on development offices, prospecting and role of prospect research/management.

He has spent the bulk of his fundraising career as a Major Gift, Leadership Gifts and Annual Fund Officer on two \$1+ billion dollar campaigns at Cornell University and the University of California, Berkeley. He began his career in 1985 as a canvasser for SANE/FREEZE in Los Angeles and Ithaca N.Y. where he led door to door canvassers in the field for 5 years. He has served in the Vice President of Development, Director of Major Gifts and Chief Development Officer roles. He is currently Chief Development Officer, USS Hornet Sea, Air and Space Museum, Alameda, CA

Most notably, he served as the Director of Development at the San Francisco Opera for over 2 years where he directed the refurbishment of their major and planned giving efforts. He proudly served as the Director of External Relations at the Springboard Schools.



*Fortune favors the bold !*

Virgil (Roman Poet)



## Why Prospect?

- Money, lots of money
- Diversity, no tokens
- Developing new MG donor bases
- Geographic and demographic expansion
- Be their first and early
- Money



When we think of cold calling..



The Difference is....

- We are easy to get rid of.
- We do our RESEARCH . Don't you?
- Your hopefully selling something awesome !



## The reality of this type of work

- It's not easy.
- Persistence
- Creativity in approaches
- The more you do the better you get
- Courage
- When it pays, it pays big !



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## When do we cold call??

- No connections
- When you have no alumni, no constituents
- When you need new leadership
- Looking for new growth in donors



## Prospecting From Lists

- NO PROFILES
- Database “Cut” Lists OR
- Researched Lists



### Example

- Simple names, contact info, any notes
- Work numbers are better
- Call first and leave a message
- Email after you try phone

Name	Address	City, State, Zip	Phone	Email	FY13	FY12	FY11	Notes
Kendra Smith	345 Scooby Doo Way	Anaheim, CA 96671	323 453-1234	<a href="mailto:ksmith@abcd.com">ksmith@abcd.com</a>	\$1,500	1,000	\$640	Former Board member, 1998
Rebecca Rodriguez	233 Palisades St	Santa Monica, CA 91123	323 556-0098	<a href="mailto:RR1000@gmail.com">RR1000@gmail.com</a>	\$5,000	\$5,000	\$5,000	No information, has been giving via mail
Joe Malone	55 Arbor St	Pacific Palisades	415 889-9909	<a href="mailto:jmalone@hotmail.com">jmalone@hotmail.com</a>	\$1,000	\$250	\$250	CEO of Dynamix Corp
Terrence Russell	334 Mueller Ave	San Luis Obispo, CA 90045	707 889-0098	<a href="mailto:TR33@gmail.com">TR33@gmail.com</a>	\$350	\$350	\$8,000	Mail donor



## Case Study: Opera

- Great need for new donor growth, “graying” of major donor population
- New Circles of Influence
  - Younger donors
  - LGBT Audiences
  - Asian donors
  
- Who are the hubs?



## BEFORE THE CALL



## Scripting: What do you call yourself..

- Do you use your title? Shorten your title?
  - Representative
  - Liaison
  - Executive Director
  - Development Officer
  - Full title?
  - I work with Mr/Mrs. \_\_\_\_\_
- First name or last name?
- Women and their first names?



## Scripting: Why are you calling?

- Sound routine but enthusiastic
- Gather information of some sort
- Thank you visit
- Ask their opinion or advice
- “He or She” asked to meet you



## Scripting: A few tricks

- Hi this is \_\_\_\_\_ I am not selling anything.
  - Use of reference that gave you their name if OK
  - Any names you can drop! Careful. What are the rules of name dropping?
  - Always adjust to who you're talking to....speed.
  - Familiar landmarks, you'll be close by and you need directions.
- 



## Scripting: Your Voice

- Energy and enthusiasm, “Having a good time”.
- Check your energy!!
- Formality? When do you use this?
- Clarity
- Accents?? Yes, Australians have more fun.





## Scripting: Let's write our own example

- You want to script the first few seconds only.
- OK, I know I called it scripting but...it's really a line or two...just to start you off.
- PLUS....
- Write down any names, info, names, affiliations, asst. names on their sheet. (hand out example)
- Date your calls, and put down times you called
- You should be able to remember the right combination from your notes



## What to avoid...

- Apologizing. What are you sorry for?
- Mumbling...
- “Is this a bad time?”
- Your Manhattan voice: Slow down!
- “I am sure you're busy”
- Carrying over the last negative call
- Assuming people know what your organization is...



## Examples

- *“Hi this is Karen, calling from the UBC. I am your local representative and I work on the Campaign for the Future. I am going to be in and out of your area in Calgary and wanted to steal 30 min of your time in Oct*
- *“ Hi this is Thomas, I work for the Alameda County Food Bank, we are reaching out to some of our past supporters and meeting with them to talk about our approach and strategy. We would like your input. I am going to be in Berkeley over the next month and wanted to see if we could set a time for a brief talk”*



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## “Small” Research Your Prospect

- For big prospects, a little research to find affinity.
- What do you share?
- What is unique about them?
- Can you drop something that will catch their attention?



# AND NOW FOR THE CALL ITSELF.....



## The Gate Keepers...

- Receptionists: Wells of information
  - First names of assistants
  - Extensions
  - Titles
- Secretary's
  - Your ticket to ride: Making friends
  - Write down details: Remember them!
  - Ask them to "print out my email" and put it in front of their boss !! Older people the better
- The Elite: Personal assistants, keeping scum like you away!!
  - How can this be of advantage for their boss? Will their boss lose out?
  - Make it clear you're not an arm twister
  - You operate on the highest authority..."I have been directed by the CDO".
  - Careful with the schmooze!





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## Quick reference codes: In addition to the database

- **NH:** Not home, w/ date.
- **CB:** Call back, they said to call back, when? Put down a time next to this.
- **LM:** Left message. Mark with Asst. or Voicemail
- **SET:** Throw a circle around this, so you don't start calling them in a frenzy.
- **NO:** and why?



## Voicemail: A few examples

- Minimal:
  - “ *Hi Mr. Cavala this is Armando Zumaya from the Playworks.. I am not calling to ask you for money...I have a quick question for you...if you would be kind enough to call me back at (510)768-7344*
  - **Good part:** *Stealthy, usually gets a call back.*
  - **Bad part:** *Can be annoying and sneaky.*



## Voicemail: Formal and impressive

- “I am calling from the office of the Chief Development Officer”
- “I am calling on *behalf* of the President’s office”
- “Please return my call or call one of my assistants at....”
- “ I am *the* Executive Director here in Los Angeles”
- **Say your name like it means something! Forceful and commanding.**
- **Think James Earl Jones.**



## Voicemail: Familiar

- “Hi this is Ola from the University of Nebraska, I am calling for Doug....can you have him give me a ring back at ... \_\_\_\_ It will be great to hear from you”
- “I was talking with Dick Snowden and he suggested I give you a call” (note the use of personal first name)
- “Mr. Jones, my name is Armando I work with your local United Way....I have been talking to a lot of people who are leaders in our community and your name came up”



## Email

- Prospects age is a factor
- ALWAYS call first, email is for back up
- If you only have email then use it.
- Email's can't talk and answer questions.
- Great with video and attachments
- Write them as personalized as possible
- Easier to reject.



# Create templates

Dear Mr. McCartney,

As a former Alexandrian I am aware of your activism on youth issues from my years in the DC Metro non profit world. I am visiting my old home at the end of the month working and wanted to visit with you and introduce you to a remarkable organization that is working nationally and changing the lives of children in DC right now. This is Playworks. Your probably saw our founder, Jill Viallet profiled last month in Forbes as one of their Top 30 Social Entrepreneur's in the world.

Playworks, is only organization nationally that is working to save recess and children's play. It seems like common sense that kids need to play. However, 40% of schools these days are ending recess and with the amount of screen time our children get, play is rapidly declining. Playworks has highly researched program that not only makes recess fun, but promotes academic achievement, socialization and virtually eliminates discipline issues in schools. Playworks has a transformative effect on schools.

We are literally the only organization nationally defending recess and offering an alternative to youth obesity, bullying and delinquency issues. Playworks has received a great deal of press. Our Founder, Jill Viallet was just named one of the Top 30 Social Entrepreneur's in the world by Forbes. (see below) We have tons of great press about us because word is getting out. Here are three selected pieces...Good Morning America, the Washington Post and Forbes

<http://abcnews.go.com/GMA/video/tight-state-budgets-force-end-recess-12598049?tab=9482930&section=1206852&playlist=12597604&page=1>

[http://www.washingtonpost.com/blogs/answer-sheet/post/the-power--and-importance--of-recess/2011/05/31/AGIAVuFH\\_blog.html#pagebreak](http://www.washingtonpost.com/blogs/answer-sheet/post/the-power--and-importance--of-recess/2011/05/31/AGIAVuFH_blog.html#pagebreak)

<http://www.forbes.com/impact-30/jill-viallet.html>

We are currently working successfully in 15 schools in DC Unified. I am going to be in DC on January 25th and 26th and would appreciate a half an hour of your time. This would be just an introductory meeting.

Best,

Armando E. Zumaya



# More templates

- Dear
- 
- There is a new national outcry these days about children's health. As you know some key issues that have risen up are bullying, childhood obesity and the state of our schools. There is a lot of alarm but few answers.
- 
- I represent one of the few if only organizations that addresses all of these issues and has a dynamic, researched, proven effect on public schools across the nation. We are transforming public schools right now at Playworks schools in 23 cities and in New York/Newark 23 schools. Few can say "we know how to prevent bullying" or "we can get every child physically active for 30 minutes a day" but we can.
- 
- We have a unique program that works through recess, these days a destructive aspect of public elementary schools. We transform recess and thereby transform school climate, getting kids moving, preventing bullying, improving academics, attendance and more.
- 
- We are backed by the Robert Wood Johnson Foundation, David and Cheryl Einhorn and thousands of other donors.
- 
- Perhaps you recently saw us earlier this month in **Newsday**
- 
- <http://www.newsday.com/opinion/columnists/peter-gold/markgoldmark-teaching-conflict-resolution-one-playground-at-a-time-1.4393461>
- 
- You may have seen our Founder, Jill Viallet, named one of the Top 30 Social Entrepreneur's in the World by *Forbes* last December.
- 
- <http://www.forbes.com/impact-30/jill-viallet.html>
- 
- A piece about us in the **New York Times**:
- 
- <http://www.nytimes.com/interactive/2010/03/13/nyregion/recess/index.html>
- 
- I am interested in setting an introductory meeting with you during my next visit to New York. This is on January 30-31st. Could I steal a half an hour of your time to introduce you to this organization, our plans and hopes for the future nationally and in the five boroughs.
- 
- 
- Best,
- Armando E. Zumaya



## Email tips

- Use assistants email with a “forward please” in the title, ask the receptionist.
- Guessing their email. Shotgun it. If it’s going to Mike Smith at the Parsons Company. Try:
  - [msmith@parsons.com](mailto:msmith@parsons.com)
  - [mike.smith@parsons.com](mailto:mike.smith@parsons.com)
  - [mike@parsons.com](mailto:mike@parsons.com)
- Put the extra addresses in BCC



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## Now...pick up that phone!

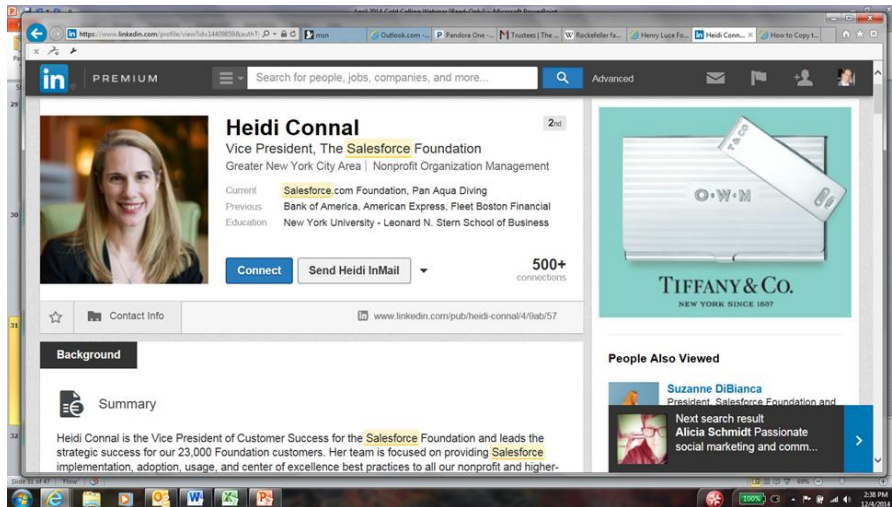
- Take a look at your notes. One more time.
- Refresh
- Remind yourself of your essential point: Why you’re calling
- Always forward your phone !
  - The meeting request
  - A routine visit?
  - Gather information of some sort
  - Thank you visit
  - Ask their opinion





## Using Linked In

- Advanced Search...best thing on earth
- Research. Can be time consuming
  - Search by title and town
  - Search by affinity groups
- InMail
- Join Groups to have access
- Looking for connections
  - Get intro's
  - Search by school



## Setting the time...

- Having open dates is best, “when can you meet in the week of the 14<sup>th</sup>? Especially for anchor appointments.
- You always just happen to be in their neighborhood.
- “What’s a good day for you in the next month?”
- Using neutral ground....coffee, drinks..etc safe bars!



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## Suggested Calling Methods

- Call and leave a good VM once in every two weeks
- Try different calling times
- Send an email to back up the call after a week or so.
- Use several lines, blocked calls on cell
- Talk and engage secretaries, front desk folks



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*"No, Thursday's out. How about never—is never good for you?"*



## Establish who you are with your script...then

- Distraction/Humor
  - What's funny? Weather jokes. Safe jokes. Common experiences are great. Traffic, weather....
  - What's interesting and engaging? Current and exciting?
- Answer questions
  - Be prepared for the regular ones...
  - I can't give now.
  - You don't have to bother, I am too far.



## E & R's: Excuses and Rebuttals

- I am already involved with other organizations. busy..
  - *Well not sure if bullying, school improvement are top priorities are on your list, if they are then you should at least know more about us...*
- "Don't have the time, very busy"
  - *When can you meet, I am in your area all the time...*
- "I can't make a gift..."
  - *We are not asking you to make a gift right now...*
- "Don't come out of your way"
  - *I am in the neighborhood*
- "Not sure I can help you"
  - *Well that's what I coming to discuss, maybe you can't , maybe you can*
- "What do you want from me?"
  - *"To educate you about our work and see if you have any interest in it"*
- "I don't know anyone, I am not a big hitter"
  - *Everyone can help in different ways that might surprise you!*



## Two different types of "No"

- The "It's not a good time" No
- The conclusive "No"
- The if you can't tell ... ask!!



## Confirmation

### – Confirm arrangements

- Read back everything
- Give them your cell phone
- Sometimes ask if you can bring them anything
- Confirmation letters are for chumps.
- Beware of the confirmation call.....seldom use it!!

•

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### If you can ...strengthen the appointment

- What might they want to hear about?
- What should you bring with you?
  - Nostalgia, colleges, programs, gifts??
  - Check your research! Qualify donor interests!
  - Listen. Float ideas if you're brave.
- Who are they in touch with? Can you build off of this appt? Do you know anyone from around your area?
- Can they help get you into other key people, can you use their name?



## Adjust and learn...

- Talk amongst yourselves!
- What's the mood out there?
- Adjust calling times.
- Recalibrate your script
- Age issues, too slow, louder?



## Create a Professional Learning Community

- Save templates/Share them !
- Notice successes
- Practice and ROLE play with each other !!
- Set periodic PLC meetings
- Oversight to ID best practices based on actual data



## Roleplays



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### Hunting the elusive prospect

- Persistence: 2 year chases and \$5 million dollar gifts. Have they said “No”.
- Having someone else do an intro call for you?
  - Friend
  - Business peer or above
  - Wife
- Internal phone systems/Getting transferred
- Using the big name, CEO, CDO, RVP
- Classic: Long term relationships with their assistants



## References: How to get them....

- Six degree's of separation
- Your Board
- Current donors
- Family
- Receptions/events
- Beyond the obvious...

— \_\_\_\_\_  
— \_\_\_\_\_



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## Professional Development

### **Live/Onsite Whole Team Trainings**

<http://www.armandozumaya.com/development-team-prospecting-training.html>

### **Upcoming Webinars**

<http://www.armandozumaya.com/upcoming-webinars.html>





# TIME FOR QUESTIONS



Thanks for your time!

Armando Zumaya

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[aez2@hotmail.com](mailto:aez2@hotmail.com)  
[www.armandozumaya.com](http://www.armandozumaya.com)



