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## The Sequence of Prospect Cultivation

All donor engagement follows the same pattern. The sequence could be as fast as several weeks. More typically, the cultivation process takes 12-18 months.

Experienced philanthropists will be very familiar with the routine. Other prospective donors may need you to narrate each step of the journey, like a doctor explaining each step of what he/she is doing to a patient. For instance, assuring potential donors that asking for a gift is not on the agenda when you phone to set up an introductory meeting is often helpfully disarming.

### Here are the six stages of a solid prospect cultivation plan:

#### Stage 1: First awareness

Cull from your records a list of those individuals whom you know to be high-capacity, highly accessible prospects. Supplement your list with the names of individuals that your organization's leadership identifies as potential donors.

Your goal is to compile a list of individuals who have both affluence **and** enthusiasm for the mission of your organization.

#### Stage 1 is over when:

- You have a name and address for each contact, and
- You have reason(s) to suspect interest in the organization, and
- You have reason to suspect capacity for a significant gift

## **Stage 2: Research**

Don't waste your time or your prospects' time asking him or her things you can find out online. Online information will help you to assign a specific and appropriate ask amount to each prospect.

**Stage 2 is over** when you have the answers to three questions:

- Does the prospect have the capacity to make a sizeable gift?
- Does the prospect have a likely interest in your work?
- Is there someone in our circle who is in the prospect's circle and can make an introduction? (If not, pick up the phone yourself.)

## **Stage 3: Preparation for first meeting**

Careful preparation for a first meeting is essential. Gather all of your materials together and be deliberate and thoughtful when composing your first letter, email, or phone call. If you can, have a mutual acquaintance make the first connection/introduction.

**Stage 3 is over** when you have:

- contact information, and
- an idea of what to say to the donor (or his or her answering machine), and/or
- the text of a letter, or, more ideally, when
- a mutual acquaintance makes an introduction.

**Note:** a call to a donor is NOT a "cold call."

## **Stage 4: Building acquaintance and engagement**

At this stage, your progress will be advanced by the donor knowing which of his/her peers are supportive. You want the donor to take small steps toward you, and you want to find out what makes the donor's heart skip a beat.

**Stage 4 is over** when you

- feel ready to ask for a gift, or, less ideally, when you
- feel stymied and need to shake something loose.

## **Stage 5: Solicitation**

Now you are ready to ask your prospect for a gift to your organization. Just as before, you need to have everything carefully lined up before wading in. Be confident and sincere. If you have taken a journey with the donor through all of the stages, then asking for a gift is the natural next step.

There are five elements to the perfect solicitation:

- The right amount, based on conversations with the donor, what they give to other organizations, formal research, or a hunch
- The right solicitor, someone the prospect respects and sees as a peer
- The right project, which matches the donor's philanthropic goals
- The right time, when the donor is thoroughly acquainted with and committed to the organization.
- If you do the previous steps right, the solicitation is easy and comfortable for all parties. If the engagement is stalled in some way, solicitation is a sure way to fill in the missing information.

**Note:** It could take two or three conversations after the initial solicitation to finalize a commitment.

**Stage 5 is over** when you secure the donor's commitment.

## **Stage 6: Acknowledgement - Thank the Donor**

This is the most important step, the goal of which is to ensure that the donor feels appreciated and that their gift makes a difference. One of the most common complaints of donors, and one the most common reasons for dropping organizations, is inadequate acknowledgement.

The most significant acknowledgement is telling the donor exactly what he/she has accomplished with his/her gift. People give away money because they want to make the world better. If you can report to your donor exactly how he/she did this, you will have a donor for life. For instance, you can ask people who benefit directly from a donation to the organization to explain what difference the gift made. Or, perhaps you can accompany the donor to a ceremony or event staged by the organization. Thanking a donor is not as precise and quantified as composing a foundation report; passionate anecdotes are more important than statistics.

**Stage 6 is never over**

Every donor who makes a significant gift should be thanked several times in different ways.