

The Re-Start: Moving the Donor Discovery Process Along

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Our world has experienced an unprecedented reset in the past two years due to the pandemic and accompanying public health measures. As fundraisers, many of us have not had the pleasure of a face-to-face meeting in a long time and, while things are opening, there are many people who are still feeling uncertain and being cautious about going out and meeting people.

For many non-profits fundraising was stalled, campaigns were put on hold, and there is a feeling of urgency to get back to developing relationships and building donor support. So, how do we rebuild relationships with past donors and develop new relationships with prospective donors? Donor discovery through direct conversations is the process that will make this happen. We can re-energize our work through discovery visits and conversations to determine prospective and past donors' level of interest and inclination to give to your charity. The time is now to just ask your donor how they feel and what they think. You don't need to research and build elaborate donor profiles, your donors will tell you where they stand, if you just ask.

There is a way to be completely polite while you are asking your donor to tell you about their interest in your mission and work. You just need to know the right discovery questions to ask. Start by asking for their story and family connections to your charity. Then ask about the projects or areas they are most interested in and why. You can also ask if they would like to get more involved or to know how they can help. You can offer more information or a visit or tour to see your project firsthand if your donor is comfortable with it. These subtle but direct one-on-one conversations with donors can tell you everything.

The most important discovery question to ask is about your donor's experience with your organization. Ask them to describe their experiences and whether they were pleased. Even if they have not had a positive experience, they may still want to give you feedback and be interested in helping to make things better. If they have had a positive experience, you can ask what impresses them the most about the organization?

Other direct questions to ask in a discovery meeting or call include:

1. What aspects of your work are they most interested in?
2. Does the work of our organization resonate with you?
3. What other causes do you support?
4. What about our work do you really like?
5. Are you open to learning more about our work?

Ultimately, if you focus on listening to the donor's story, adding only prompts like "tell me more" or "how did you feel about that", you will learn everything you need to know to determine if this prospective donor has the interest in your organization and the inclination to give. Now is a great time to get out there and have a direct discovery conversation.