

Slide 1	<p style="text-align: center;"><b>Making Personal Calls</b></p> <p style="text-align: center;">Roger Ellison, CFP</p> <p style="text-align: center;">2011 Western Regional Planned Giving Conference</p> <p style="text-align: center;">Costa Mesa, California</p> <p style="text-align: center;">Thursday, June 2, 2011</p>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
Slide 2	<p style="text-align: center;"><b>“Good morning, Mrs. Jones, this is Roger Ellison - I’m with the West Texas Rehabilitation Center Foundation...”</b></p>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
Slide 3	<ul style="list-style-type: none"> <li>• <i>“You’re with who?”</i></li> <li>• <i>“We’re not interested.”</i></li> <li>• <i>“I just sent you a check.”</i></li> <li>• <i>“I only give at Telethon time.”</i></li> <li>• <i>“I only give when somebody dies.”</i></li> <li>• <i>“We give a calf at Roundup time.”</i></li> </ul>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>

<p>Slide 4</p>	<p><b>“Oh, I didn’t call to ask you for a gift...”</b></p> <ul style="list-style-type: none"> <li>• <i>“Then why did you call?”</i></li> <li>• <i>“What do you want?”</i></li> <li>• <i>“What can I do for you today?”</i></li> </ul>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
<p>Slide 5</p>	<p><b>“I’m going to be in Mason tomorrow on business, and I’d like to make an appointment to come by and visit with you.”</b></p> <ul style="list-style-type: none"> <li>• <i>“What for?”</i></li> </ul>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
<p>Slide 6</p>	<p><b>“I’d like to come by and</b></p> <p style="text-align: center;">...</p> <ul style="list-style-type: none"> <li>• ...thank you for what you do for the Rehab.</li> <li>• ...tell you about some new things we’re doing at the Rehab.</li> <li>• ...bring you a token of appreciation for your support.</li> <li>• ...tell you about my work with the Rehab.”</li> </ul>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>

Slide 7

- *"I don't do that much."*
- *"I can't do any more."*
- *"You don't need to thank me."*
- *"I've already been thanked."*
- *"Honey, you've got better things to do with your time than come by to thank me."*
- *"I'm going to be busy for the next month or so."*

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Slide 8

- "We're..."***
- *...shearing*
  - *...lambing*
  - *...branding*
  - *...working cattle*
  - *...planting*
  - *...cutting hay*
  - *...going to Wal-Mart*
  - *...going to the doctor*
  - *...putting up peaches*
  - *...going to be out of town*
  - *...rearranging the sock drawer."*

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Slide 9

***"What do you do for the Rehab?"***

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Slide 10	<p><b>"I work for the Rehab's Foundation and do charitable gift and estate planning."</b></p> <ul style="list-style-type: none"> <li>• <i>"Isn't that something to do with wills?"</i></li> <li>• <i>"I've already got a will."</i></li> </ul>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
Slide 11	<ul style="list-style-type: none"> <li>• <i>"I'm leaving everything to my kids."</i></li> <li>• <i>"I don't have THAT much money."</i></li> <li>• <i>"I wrote my own will."</i></li> </ul>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
Slide 12	<ul style="list-style-type: none"> <li>• <i>"My husband's uncle is a lawyer, so I've got all the help I need. He's 87, sharp as a tack, except that stroke last month kind of set him back a bit. He used to do a lot of oil and gas work for one of those big rich oil companies. He's really good. He knows all about estate planning."</i></li> </ul>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>

Slide 13	<ul style="list-style-type: none"><li>• <i>"Oh, we don't have an estate."</i></li><li>• <i>"I'm on a fixed income and my daughter has psoriasis."</i></li></ul>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
Slide 14	<p><b>Why were they not home?</b></p> <ul style="list-style-type: none"><li>• <i>They were...</i><ul style="list-style-type: none"><li>– <i>shearing</i></li><li>– <i>lambing</i></li><li>– <i>branding</i></li><li>– <i>working cattle</i></li><li>– <i>planting</i></li><li>– <i>cutting hay</i></li></ul></li></ul>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
Slide 15	<p><b>They...</b></p> <ul style="list-style-type: none"><li>• <i>had gone to Wal-Mart</i></li><li>• <i>had gone to the doctor</i></li><li>• <i>had changed their mind</i></li><li>• <i>had gone out of town.</i></li><li>• <i>thought I was coming at 11:00.</i></li><li>• <i>thought I wasn't coming.</i></li><li>• <i>knew I was coming!"</i></li></ul>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>

<p>Slide 16</p>	<p style="text-align: center;"><b>I Deduced:</b></p> <ul style="list-style-type: none"> <li>• Telephone was NOT an effective way to meet donors.</li> <li>• Planned giving had the sound of the unknown.</li> <li>• Planned giving was confusing.</li> <li>• Planned giving had an alarming sound.</li> </ul>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
<p>Slide 17</p>	<p style="text-align: center;"><b>Securing Appointments</b></p>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
<p>Slide 18</p>	<p style="text-align: center;"><b>Making the telephone call</b></p> <ul style="list-style-type: none"> <li>• Do your homework <ul style="list-style-type: none"> <li>– Participation in organization</li> <li>– Recognition on the job</li> <li>– Giving history</li> <li>– Donor knows who</li> <li>– Common interests</li> </ul> </li> </ul>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>

<p>Slide 19</p>	<p style="text-align: center;"><b>Making the telephone call</b></p> <ul style="list-style-type: none"> <li>• <b>Do your homework</b> <i>continued</i> <ul style="list-style-type: none"> <li>– What about organization appeals to donor</li> <li>– Unique offering</li> <li>– Interests or goals</li> <li>– Others</li> </ul> </li> </ul>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
<p>Slide 20</p>	<p style="text-align: center;"><b>Making a connection</b></p> <ul style="list-style-type: none"> <li>• Past support</li> <li>• School experience</li> <li>• Mutual acquaintance</li> <li>• Pre-call correspondence</li> <li>• Common event</li> <li>• Regards from organization's official</li> <li>• Cite an article</li> <li>• Ask for an opinion</li> </ul>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
<p>Slide 21</p>	<p style="text-align: center;"><b>You've got 30 seconds!</b></p> <ul style="list-style-type: none"> <li>• Greeting with name and organization</li> <li>• A connection that ties prospect to the organization</li> <li>• The compelling reason for the call</li> </ul>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>

Slide 22	<p style="text-align: center;"><b>Unfortunately, it didn't work well for me!</b></p>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
Slide 23	<p style="text-align: center;"><b>Gain an understanding of your donors (walk in their shoes)</b></p> <ul style="list-style-type: none"> <li>• Who were they?</li> <li>• Where were they?</li> <li>• From where had they come?</li> <li>• How did or had they made their way?</li> <li>• What were they like?</li> <li>• What was their world like?</li> <li>• How did they look at your charity?</li> <li>• Why and how did they give?</li> </ul>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
Slide 24	<p style="text-align: center;"><b>Gain an understanding of your charity (see ourselves through the eyes of others)</b></p> <ul style="list-style-type: none"> <li>• When did we begin?</li> <li>• Why did we begin?</li> <li>• Who made it happen?</li> <li>• What did we do?</li> <li>• How did we do it?</li> <li>• Why had we been so successful?</li> <li>• What is our image?</li> </ul>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>



Slide 25	<p><b>How was I to connect our donors to the Rehab through my work?</b></p> <ul style="list-style-type: none"><li>• we were appreciative of their gifts</li><li>• it was only appropriate to thank them</li><li>• neighbor helping neighbor was our history</li><li>• our donors were our neighbors and our friends</li><li>• drop by and thank them<ul style="list-style-type: none"><li>– On their turf, in a manner which fit them, but with my agenda.</li></ul></li></ul>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
Slide 26	<p><b>Do I fit?</b></p>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
Slide 27	<p><b>I am the Rehab</b></p>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>

Slide 28

### Essential principles

- When something doesn't work
  - stop,
  - figure out why it doesn't work,
  - make a change,
  - and start over.
- Understand your donors.
- Understand your charity.
- Know yourself and make sure you fit.

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Slide 29

### Essential principles - *continued*

- Develop a style that is culturally harmonious with:
  - Your charity,
  - Your donors,
  - Your work.
- Relationship building requires face-to-face contact.
- Develop a way to see people.

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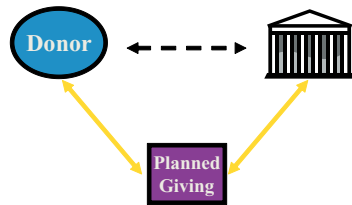
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Slide 30



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<p>Slide 31</p>	<p style="text-align: center;"><b>Absolute integrity</b></p> <ul style="list-style-type: none"> <li>• Model Standards/Ethical principles</li> <li>• The Garrett Standards <ul style="list-style-type: none"> <li>– Never do to a donor what you would not do for your own mother and father.</li> <li>– No gift is worth the good name of your charity.</li> </ul> </li> </ul>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
<p>Slide 32</p>	<p style="text-align: center;"><b>How to tell the story</b></p> <ul style="list-style-type: none"> <li>• My introduction</li> <li>• What do I do?</li> <li>• Seven words or less</li> <li>• Elevator speech</li> <li>• My business card</li> </ul>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
<p>Slide 33</p>	<p style="text-align: center;"><b>Where do we get our prospects?</b></p> <ul style="list-style-type: none"> <li>• Response to marketing <ul style="list-style-type: none"> <li>– Direct mail (e or snail)</li> <li>– Newsletters</li> <li>– Web responses</li> </ul> </li> <li>• Self nominations</li> <li>• Referrals</li> <li>• Professional advisors</li> <li>• Lurking at events!</li> <li>• Face-to-face at their front door!</li> </ul>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>

Slide 34

### Which friends are prospects?

- Nominations
- Giving History
- Age
- Database screening
- Generosity and Passion

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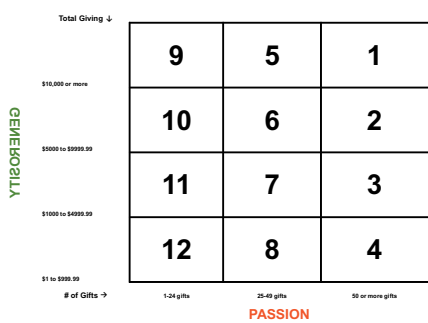
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Slide 35



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Slide 36

### Implementing a plan

- Vehicle
- Bumper stickers
- Dress for success
- Collaterals

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<p>Slide 37</p>	<p style="text-align: center;">Implementing - <i>continued</i></p> <ul style="list-style-type: none"> <li>• Prepare for the visit</li> <li>• Observation</li> <li>• Knocking on the door</li> <li>• Waiting for an answer</li> </ul>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
<p>Slide 38</p>	<p style="text-align: center;">Implementing - <i>continued</i></p> <ul style="list-style-type: none"> <li>• Greeting your friend <ul style="list-style-type: none"> <li>– Make and maintain eye contact.</li> <li>– Greet your friend by name - warmly and genuinely.</li> <li>– Introduce yourself.</li> <li>– Appreciate them on behalf of the President.</li> </ul> </li> </ul>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
<p>Slide 39</p>	<p style="text-align: center;">Implementing - <i>continued</i></p> <ul style="list-style-type: none"> <li>• Greeting your friend <ul style="list-style-type: none"> <li>• Discuss what you do</li> <li>• Engage them</li> <li>• Make sure you are invited to return</li> </ul> </li> </ul>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>

Slide 40	<p style="text-align: center;"><b>Implementing</b> - <i>continued</i></p> <ul style="list-style-type: none"> <li>• Practice your visits</li> <li>• My agenda, in their time</li> <li>• Demystifying planned giving through story <ul style="list-style-type: none"> <li>– Shopping for clothes</li> <li>– The elevator story</li> </ul> </li> </ul>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
Slide 41	<p style="text-align: center;"><b>Implementing</b> - <i>continued</i></p> <ul style="list-style-type: none"> <li>• Moving the conversation</li> <li>• Beware trying to get too much done</li> </ul>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
Slide 42	<p style="text-align: center;"><b>Implementing</b> - <i>continued</i></p> <ul style="list-style-type: none"> <li>• Successfully exiting a visit: <ul style="list-style-type: none"> <li>– Repeat the appreciation</li> <li>– Provide business card</li> <li>– Secure an invitation to return</li> </ul> </li> </ul>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>

Slide 43

**Donors are  
your friends.**

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Slide 44



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