

SALES TRAINING FOR MAJOR *and* PLANNED GIVING FUNDRAISERS

7 QUESTIONS TO ASSESS HOW YOUR DEVELOPMENT TEAM IS DOING:

1. Do I know how much time my fundraisers are spending with our donors?
2. Am I aware of how my fundraisers are approaching our donors?
3. Do I have reliable metrics to measure my team's performance?
4. Is the pressure of raising more dollars moving us away from a relational approach to a transactional one?
5. Are my fundraisers avoiding the planned giving conversation?
6. Does high turnover in our office hinder growth and weaken relationships with our donors?
7. Do I have the time and ability to train and coach my team as much as they need?

I've been working with nonprofit organizations for 15 years, and I've seen many good people who had the capacity to be great fundraisers flounder to meet their goals and burn out or (worse) settle for mediocrity. Why? Two common reasons:



1. *Old Habits*

To succeed in today's competitive fundraising environment, fundraisers cannot rely on what they've done in the past. They must develop new habits to replace old, ineffectual ones.

2. *Lack of Training*

There is a false assumption that, in order to have made it to his or her position, a fundraiser must have had proper training. But most managers are too busy to train and coach their teams, and a lot of fundraisers are left to figure it out on their own as best they can. (Or not.)

I can help.

I provide personalized training and coaching for annual, major and planned giving professionals. I'm not just a consultant, and my programs are not about merely dispensing advice. I coach, train, give objective feedback, troubleshoot, advise and gently prod my clients to achieve and surpass their goals.

MY APPROACH

Personal assessment: I begin with an assessment of each person on your team to discover strengths and areas that need improvement. Everyone on your team has his or her own style, preferences and skills. My goal is to discover those and tailor my training and coaching to fit.

Quarterly group training sessions: With your approval, I design a custom curriculum for your team, covering all aspects of how to be a great fundraiser.

Bi-monthly coaching sessions: These coaching calls reinforce the training and give your team members an opportunity to ask specific questions, get motivated, and focus on the areas where they need the most help.

"Working with Joe we reinvigorated our Legacy Society, developed measurable goals for planned giving solicitations and increased our monthly activity."

*-Troy M. Miller
Executive Director, Lock Haven University Foundation*

Joe Tumolo
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Major and Planned Gifts Training
Coaching
Speaking

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YOUR RESULTS

I'll help you and your team identify the areas that need improvement. Then we'll develop a plan with specific steps to achieve measurable results.

We'll work in three key areas:

1. Mindset:

- Everyone will have clarity around what's most important in their role and in the overall needs of the donor and your organization.
- We'll identify and work on the mental baggage that's preventing people from picking up the phone and calling donors on a daily basis.
- As a team and as individuals, we'll develop "SMARTER" goals and execute a plan to exceed them.
- Our work will help everyone develop an abundance mentality that keeps people motivated and "thirsty" to develop more relationships with donors and people of influence.

2. Behavior:

- Everyone on your team will have a plan and a process to track and report on his or her actions and results.
- We'll assess whether the team is asking for gifts at the right time and for the right amount. If not, they will learn how to do so.
- Team members will learn how to conduct and contribute to productive prospect pipeline meetings.
- Your team will set up or refine a process to be sure your donors are being stewarded in a personal and consistent way.

3. Skillsets:

- Your fundraisers will learn practical ways to get in front of more and better-qualified donors.
- Everyone will learn to ask better questions. Questions that build trust and encourage donors to give more.
- As a team and as individuals, we will identify the old habits that need to go and develop better habits to improve productivity and donor satisfaction.
- We will improve communication skills like listening, storytelling, as well as being responsive to donors needs.

"Joe provided us outstanding training. Joe's work was key to our ability to create structure, discipline and accountability to our process, without which we would have continued to struggle to move forward."

*-Marilyn Earley
Director of Advancement, Worcester Academy*

For a **FREE CONSULTATION** on how I might be able to help your team,
or for references of other nonprofits I've helped, please
call me at **610-653-7906** or email me at **joe@constellationadvancement.com**

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