

PHILANTHROPY
SYSTEMS
Improving Fundraising Performance

Open Workshop

April 3-5

Omni Hotel
Los Angeles





About Event

**Go step by step through the donor
cultivation & solicitation process**

This class teaches a step-by-step process that fundraisers can trust to secure large donations successfully. Trends come and go, but you can adapt once you have this foundation.

Workshops teach you everything you need to know and give you the tools you need to start closing major gifts. We outline a clear roadmap to follow when soliciting large-dollar contributions. Participants walk away with a step-by-step process for cultivation and solicitation, templates, forms to help organize the strategy, implementation plan, and coaching on early solicitations.

Event Agenda

Day 1

Topic: Introduction to the donor journey

Understanding the donor journey is crucial to cultivation & solicitation. Could you identify the five elements of the donor journey and when each is a priority?

Learning Objectives: Identification of the giving process

Topic: Prospecting

More than "look them up in the database," how do fundraisers get High Net Worth prospects to the first meeting?

Related Fundraiser Challenges: Are you bringing in enough new prospects?

Learning Objective: "Micro-Marketing plans," getting to "tell me more," the role of marketing & prospect research.

Topic: The First Meeting

The first meeting is more than a casual coffee. Successful first meetings identify and diagnose key donor priorities, then gain agreement to move forward.

Related Fundraiser Challenges: Are you getting your donors maximum donation?

Learning Objectives: Donor alignment - moving capabilities to vision - uncover potential value

Topic: The Donor Vision

The donor invests in their philanthropic vision. Turning donor priorities into a vision aligning with your organization's capabilities is critical.

Related Fundraiser Challenges: Are you closing enough of your prospects?

Learning Objective: Develop vision statements that motivate donors, turning donor priorities into philanthropic visions.

Event Agenda

Day 2

Topic: Gaining access to decision-maker(s)

You can't close somebody who can't donate. Negotiating access to decision-makers is a critical tool for every fundraiser.

Related Fundraiser Challenges: Is your cycle time too long?

Learning Objectives: Negotiation with power sponsors - Discussing decision-making authority with prospects

Topic: Proposal Development

Proposal Development is not done alone in your office, but rather, a collaboration with the prospect. Working with the donor to set up a proposal for impact and speaking the donor's language (the language of money) is critical.

Related Fundraiser Challenges: Is your cycle time too long & are you getting max donation?

Learning Objective: Understanding the elements of a successful proposal - the role of the prospect in the proposal - speaking in a language prospects understand

Topic: Post-Proposal Plan

The proposal is not the end. The donor will evaluate the proposal. The fundraiser should lead the evaluation.

Related Fundraiser Challenges: Is your cycle time too long, are your donations small, and are you closing enough prospects

Learning Objective: Proposal evaluation plan - steps required to close donation, "Go/No Go Steps," critical stakeholder involvement

Event Agenda

Day 3

Topic: Closing with the donor

Often, there is a big meeting where the agreements are signed. Are you ready for contingencies, donor cold feet, donor second thoughts?

Learning Objectives: Understanding the donor at the end of the cycle - develop negotiation responses

Topic: System Implementation

Okay, this was a great seminar, and I learned new things, but how do I implement this back at the office?

Learning Objective: Prospect audit - prospecting time on calendar - initial outreach to prospect indicating a need for discussion

Topic: System Management

As a manager managing a team running the system, what tools do I have to help me manage my team, their prospects, and upper management/ boards?

Learning Objective: How to evaluate the strength of prospects and utilize the strength checklist - revenue forecasting - tips for RE implementation - prospect coaching - KPI management

Final thoughts

Workshop Templates

Setting you
up for
success

Prospect Strategy chart

Micro-Marketing plan

Success stories

Philanthropic priorities "tell me more" marketing pieces

Six block questions

Vision statements

Prospect Confirmation emails

Power broker emails

Power broker negotiation template

Power sponsor confirmation emails

Success criteria

Capabilities chart

Value proposition

Budgets

Proposal evaluation plan

Proposal evaluation plan step completed emails

Negotiation worksheet

Negotiation preparation

Prospect Strength Checklist

Forecasting opportunities & fundraisers



Post Workshop support

Coaching Sessions

5 - post-event coaching sessions with Philanthropy Systems instructor

Prospect Support

Strategy meetings to discussion first three prospects you set up meeting with

Presenters



Benjamin Wirick

Benjamin Wirick, the founder of Philanthropy Systems and partner in Philanthropy Solutions, is a nonprofit career professional with over 25 years of nonprofit development experience, seven years as the Vice President, Development & Community Support, and ten years as a consultant. Wirick is a speaker, leader, mentor, and thought leader.



Susan Zarrin

Susan Zarrin joined Philanthropy Systems with the intention of helping fundraisers be more successful. “Raising more money is just more fun,” says Zarrin. As an Open Workshop Instructor, Zarrin brings the Philanthropy Systems methodology to the nonprofit communities that want to raise more dollars.