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Building Authentic Donor Relationships

# Creating Strategic Plans and Goals for Every Major Donor

An article from Veritus Group to help you  
succeed at major gift fundraising.

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## What you will learn

1. The value of individualized major donor plans and goals
2. How to create and use a Marketing Impact Chart to guide your work
3. Why you need detailed planning along with regular moves management records

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**T**he look on her face said it all. “You want me to create a strategy for every single one of the donors on my caseload? Are you kidding me?”

This is usually the reaction our team at Veritus Group gets when we tell MGOs that this will be one of the first things they need to do if they want to become successful with us.

After the initial shock wears off and denial turns to acceptance, we get to work. We don't skirt the enormity of the task. It is HARD work. We realize that. If it were easy, everyone would be doing it. But they are not. And this is one of the reasons that MGOs, and ultimately non-profits, struggle with their major gift programs... they don't have a plan.

In this paper, we're going to share with you a step-by-step process on how to put together a strategic plan for each donor. This is the same process we use with our clients to help them overcome what they think is insurmountable.

Once MGOs start working on this process, they realize that not only is it possible, but it's necessary for them to stay on task and become successful.

### **The Marketing Impact Chart**

So how do you create such a plan? We at Veritus Group like to first see if your donor database or moves management system has the ability to enter goals and strategy. This would be the best place. However, many non-profits either don't have a good system for this, or they have nothing at all.

Veritus Group's main tool for developing and tracking your progress with individual donors is the Marketing Impact Chart (MIC) — a detailed annual plan that each Major Gift Officer creates and follows with his or her caseload.

The MIC is *the* tool to help an MGO maximize the relationship with each of the donors on his or her caseload. It helps the MGO become as intentional as possible – it is a fiscal and communication guide for the year.

Often when we introduce the process of an MIC, MGOs will respond that they are already following a plan. An ask leads to a thank you, which leads to an event, which leads to a face-to-face meeting, etc. However, in our experience, we find that it's hard to really get to *all* of the communication intended if it's not scheduled out ahead of time. Instead, intended communication ends up falling through the cracks.

The ask and the thank-you take place, and then the donor is forgotten as the MGO pursues other asks and thank-yous. Without a plan that is created in advance, most MGOs end up *reacting* in their relationships with donors (a gift, an invitation that needs to go out) rather than pursuing them and building a true relationship.

The bottom line is that it's hard to build solid relationships with 75-150 people without a plan. And in the end, the relationship becomes driven by money (the need to ask) rather than by investing in the donor as a person.

The best MICs include all of the following elements:

- Personalized, one-to-one communication
- Specific communication plans that take the donor's preferences into account
- A healthy cycle of donor communication that reports back on how the donor's gift made a difference, and a concurrent cycle of communication that sets up an ask in an area the donor is interested in.
- Room for change as a means of honoring the relationship
- Financial goals that are broken down (cash-flowed) on monthly basis

Let's go through each of these important elements:

### Personalized, One-to-One Communication

As you know, major gift programs are based on a one-to-one approach. This is different from the one-to-many direct mail approach where one bulk message is communicated to a large group of people. In major gifts programs there should be an individual plan FOR EVERY DONOR that is personally created and managed by the MGO. This is an important distinction because some organizations think they are pursuing major gifts by sending specific appeals to their biggest givers. But in reality, these are still direct mail programs because they involve sending one broad message to many people. True major gift strategies always involve personal, individualized communication.

This is one of the reasons that major gift work is so labor intensive — it takes a lot more time to pursue individual strategies with a caseload than just implementing a high-end direct mail program. On any given month, an MGO may be speaking with some people on the phone, asking others via face-to-face meetings, attending an event with others, and sending thank-you notes or other mailings that demonstrate the impact of a certain donor's gift. The caseload is being thanked, asked, called, and met with throughout the month — and each strategy with every donor is different. It's personal. It's authentic. And it makes a huge difference.

### Matching the Donor's Communication Preference

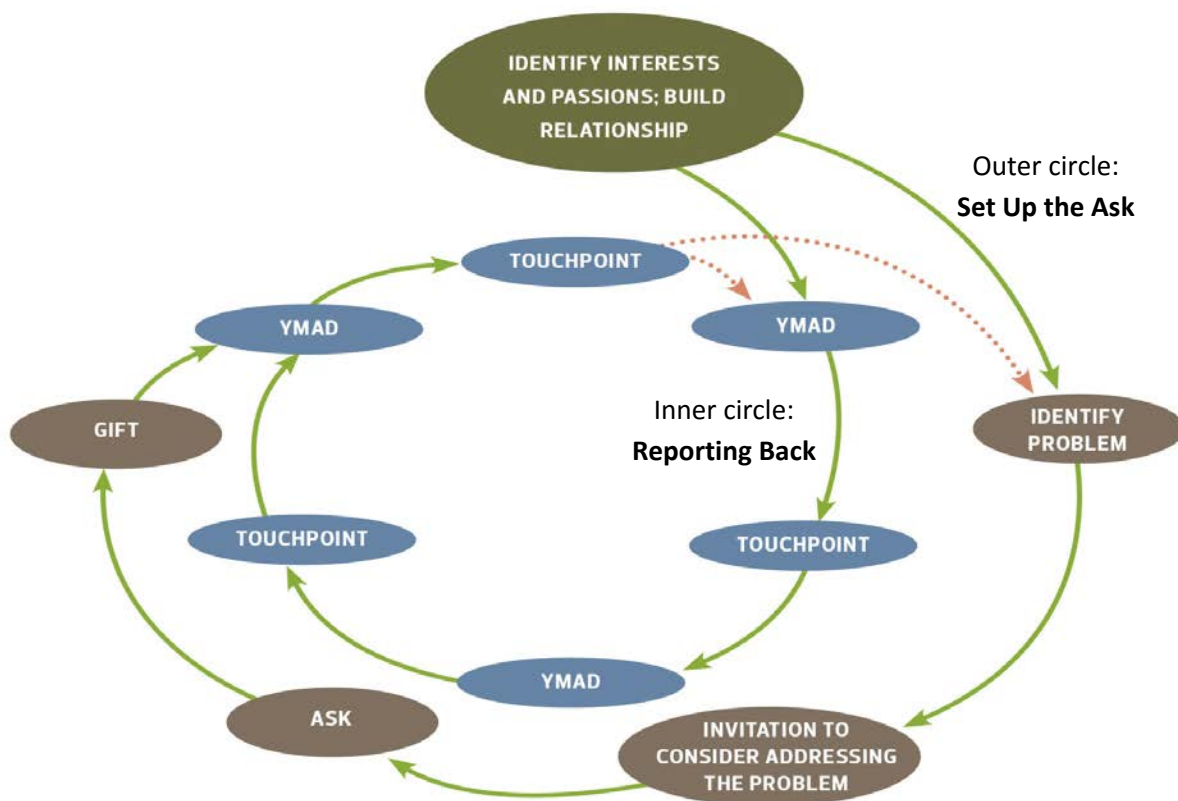
Focusing on the relationship means that the donor — not the major gifts staff — should drive the communication. By this we mean that it is the organization's responsibility to allow donors to determine their level of involvement and to articulate what programs, people groups or initiatives they are passionate about. In addition, the donor will have clear preferences about how s/he wants to communicate with you. Some people like face-to-face meetings. Others do not. Some people prefer email communication or phone calls, and others want to receive information in the mail.

## Two Parts of the Donor Communication Cycle

There are two communication cycles that run concurrently in all major gift donor management and communication. Both cycles are based on the donor's interests and passions. But from that point they break down into two distinct strategies.

The first is reporting back to the donor on how her gift is making a difference – that is the inner cycle in the graph below – the blue items.

The second cycle is the one where you set up the next ask. We will address the elements of these two cycles after the graph.



### ***Reporting Back after the Gift: the First Cycle of Donor Communication***

- You Made a Difference (YMAD) – This step is the macro version of the Follow Up. How did the donor's giving help? How are you growing, and what exciting things are happening? One of the major reasons for donor attrition is that the donor is not made aware of the impact of her giving. The result is that she gives elsewhere in order to find

that satisfaction. Communicate this to the donors and link your good work and progress to their giving. You can't do this enough.

- **TouchPoints** – In between YMAD communications, you'll want to stay in touch with donors through a mix of different strategies to let your donor know they are making a difference and that they are important to the organization. They will ideally relate to the donor's passions and interests, leading to future asks. These TouchPoints, a minimum of one per month (sometimes more), include tactics such as:
  - A report from the "front line" which matches the donor's interests and assures the donor that their gift has made a difference.
  - An internal memo that addresses some problem or situation in the ministry that the donor would be interested in. This gives the donor an insider's view.
  - A Facebook message/comment or blog
  - An appropriate gift.
  - An annual report with a note indicating which article might interest them.
  - Invitations to a special event or briefing.
  - A newspaper or news magazine clipping that either describes a problem that you are dealing with and/or talks about the organization.
  - A copy of an actual letter from a person helped by your organization.
  - Personal visits.
  - Telephone calls or post cards.
  - A report from the *Chronicle of Philanthropy* that says giving is down, etc.
  - A video or audio clip that either shows a problem or shows a solution.
  - A birthday or anniversary card.
  - A book that deals with compassion or caring.
  - A note from various leaders in the organization.
  - A picture of a person that has been helped in their area of interest along with a post-it note that says something to the effect of: "Here's a picture of [name]—a person your giving has helped in [X area]" along with a brief project report.
  - An email that gives a success story or sets up a problem.

### ***Setting up the Ask: the Second Cycle of Donor Communication***

- **Stating the problem** – Clearly articulating the needs, concerns, and the areas that need funding. We call this the "Problem." It could be the needs you have in keeping your great work going. Or it could be a project that is underfunded. Regardless, each donor needs to hear about the needs you have (specific to what you know s/he is passionate about) and how s/he can help with the solution.
- **Ask** – Every donor should be asked at a frequency that fits his/her specific profile and cadence. The ask should be based on what they give to and what their giving preferences are. The ask should be specific and should take their prior giving into account. Every ask will be different, based on the MGO's relationship with that donor. But an ask is not just sending a proposal with a stamped return envelope. The major

donor ask involves really communicating the needs and asking the donor to partner with you in helping with the “problem.” Many MGOs have difficulty with this and actually have an incorrect philosophy when it comes to asking. We can ask appropriately and unapologetically because we know there is a need. Not asking for money or presenting financial needs is actually poor stewardship. How can someone think about what to give if he or she doesn’t know what your financial needs are?

- Thanks – A thank-you follows any gift and sometimes just happens spontaneously. It can take any number of forms. It can also be a way to try and contact the donor so you can thank the donor in person and truly express your gratitude for partnering with you in your work.
- Follow Up – In our experience, most non-profits are excellent about getting the money and investing it, but they have more difficulty in reporting what the money does. Just as most people would never place their money in an investment fund that does not report back earnings, many donors stop supporting organizations because no one ever told them what their money did! In major gifts fundraising, it is imperative to report back to the donor throughout the year – as often as possible. A donor should regularly hear, in very specific terms, that her giving actually made a difference. This goes beyond the standard thank-you, and few non-profits include this step in their communication plans.

### Leave Room for Change

One of the most common arguments we hear *against* completing an MIC is that the plans for donors are always changing. This is true – and that’s as it should be. No relationship follows a step-by-step equation. The MIC is the place that allows you to plan a calendar of communication with each donor so that nothing falls through the cracks. With organizational events, volunteer opportunities, holidays, asks, face-to-face meetings, along with the desire NOT to communicate with your major donors EVERY month, you need to plan.

That being said, your plans will change. As you connect with donors, you’ll learn things that will alter your plans and you must adjust your communication strategy accordingly. The MIC is a fluid document. It needs to be if it is going to honor the donor. But it’s still better to adjust a plan and leave room for change than to have no plan at all.

### The Importance of Revenue Goals

We have written a lot about the communication part of the MIC. But the other primary function the MIC serves is its ability to help you set and track gifts month-to-month. As we stated earlier, the MIC is your communication and FISCAL guide.

It is important that an annual goal is set for each donor so you know how much revenue to anticipate from **each** donor. This goal should be based on prior giving and capacity — but it needs to be realistic. The goals set for donors will also be used as you forecast revenue, so this

is not the place to lean on hopes. You need to set goals based on what you KNOW about each donor, as demonstrated by their past gifts.

In addition, the goal should be broken out monthly, based on each donor’s giving history. So if you have a donor who always gives in December and June, the goals should be allocated for those months. This is important because it allows the MGO to know immediately when a donor has strayed from his or her giving pattern.

Too often we see MGOs tracking giving month to month without any knowledge of donors who are off-pattern. So while \$35,000 in revenue may be anticipated in April, you could actually have a donor who made a \$5,000 gift that was unexpected and it might cover up two donors \$2,500 gifts that were not given. This detail is missed until the mid-year review, when you realize giving is down. Setting monthly goals and tracking accordingly helps you stay on top of giving projections and manage donors more precisely.

So, a Marketing Impact Chart for your caseload WILL take you a lot of time to build *at first*. But once you’ve been through the process, it becomes second nature. The value of tracking giving month-to-month and being more strategic and intentional with your donors is immeasurable.

Time and again we’ve seen loyalty increase, giving grow, and MGOs gain confidence by using an MIC. When you really invest in your donors and build better relationships with them, you look forward to connecting with them. You feel good about your work. And the donors reciprocate. You can create true, authentic relationships with your caseload. We’ve yet to find any MGO who has used the MIC for a year and then trashed it. It’s changed every client’s bottom line for the better, because it helps the MGO do her job more efficiently and productively.

So what does an MIC look like? Here’s a simplified sample:

Donor	ID #	Interest	Comm Pref	Goal	Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec
Smith	362786	Children	Email	\$ 35,000	Visit	Card	Memo	Book	Ask: China	F/u Ask	Invite to Trip	Internal report	Project Rpt	Donor Trip	Ask China	Book/Gift/Thx
Perry	872646	Housing	Face/Face	\$ 110,000	Tel call	Report on India	News Letter	Invite to Event	Tel Call	Birthday	Tel call	Ask: India	Birthday	Tel Call	Yr. End Ask	Book/Gift/Thx
Willman	762508	Hunger	Tel	\$456,000	Birthday	Annual Rpt	Auditor Rpt	Tel call	News clipping		Invite to Trip		Invite Meet Paul	Donor Trip	Tax Planning	Book/Gift/Thx
George	146268	?	Face/Face	\$ 23,000	Tel call	Thanks for Last Gift	Interest Inventory	Book	News clipping	Birthday	Tel call	Anniversary	Book	Tel Call	Yr. End Ask	Book/Gift/Thx

Notice that the donor name, ID, area of interest, communication preference and goal all sit on the left side of the document followed by the moves for every month. On a more complex version of this document the annual goal is also cash flowed.

(Don’t worry, we’ll send you an Excel template for this document on request, free of charge. But that’s later...)

## How Do I Fill This Out?

Before outlining the steps to complete your Marketing Impact Chart, we are going to make three very big assumptions: 1) that you have qualified the donors on your caseload, 2) that you have a revenue goal and have cash flowed those goals by the month you think that revenue is coming in, and 3) that you have your donors tiered A, B and C levels. Now, a note about tiering: the higher you tier the donor, the more personal the strategy. Just keep that in mind as you work on strategies for each donor.

Here is the process you should follow to fill it out, in order:

1. **Write in all the mass communication pieces throughout the year.** Take a look at your mail schedule: appeals, newsletters, annual reports, etc. Plug those into the months they are scheduled to drop. For “A” level donors you are going to want to create personal notes with some of these, so be aware of that when you figure out your weekly schedule. You can easily copy and paste this into your spreadsheet for every one of your donors.
2. **Review the month each donor’s revenue is expected to come in** – then work three months backwards. For example, if you know that you are projecting revenue for Mrs. Smith in November, you need to put the high-level strategy starting three months prior to set up that solicitation. So in August, you are starting to set up the meeting for November, then in September, sending a report on what her last gift did, and finally in October you send a formal proposal or prospectus to set up your face to face ask in November. Make sense? For larger and more complex gifts you will need to allow more time to develop the ask – note the “set up the ask” cycle in the earlier illustration.
3. **At least quarterly, send “you made a difference” (YMAD) pieces to everyone on your caseload — plug those in for every donor.** Your “A” and “B” level donors could be monthly touches that are highly personalized by you.
4. **Twice a year you want to report on specific programs your donors are funding with a report from the field.** Those will be sent at different times depending on when donors gave their gifts. Populate your plan accordingly.
5. **Twice a year thank you calls.** These are calls you make in addition to thanking any donor on your caseload file who gave a gift. Randomly thanking donors during the course of the year will endear them to your organization. You may consider up to four of these for “A” and “B” level donors.
6. **Twice a year “I know you” communications.** These are notes or e-mail links or even cut-out magazine or newspaper articles your donors have an interest in. Especially for your “A” level donors, this is something to let them know YOU know them and are taking the time to recognize that.
7. **Cultivation face-to-face visits.** Not every face-to-face visit should involve a solicitation. Some visits are meant to report back to donors how they made a difference and/or find



out their passions and interests so you can get to know these good people and develop a relationship with them.

8. **Event invites and donor-view trips to see your programs in action.** You should consider at least once per year inviting your caseload donor to see your programs in action. It could mean inviting them to your location just minutes from them or taking them to Uganda to see a water project they helped fund. This is a great cultivation and reporting back tool.

These are the main overall strategies that you need to develop over a 12-month period for your caseload. Once you have these loaded into your system or spreadsheet, you'll have **moves** associated with each strategy. Enter those tactics or moves into either your moves management system OR simply into your calendar.

This will automatically give you your "to-do's" for each day you come into the office. For example, a few moves that come from a strategy would look something like this: Let's say in February you are going to send a project report to one of your donors. So break that down into its constituent tasks: one move would be to alert the program team in December to start putting together that report; another move would be to let your communications team know that they have to create the piece from the information that program gives them, etc., etc.

Or, if you are a one-person shop, these would all be reminders to yourself that you need to get this completed in order for you to get it out in February. All these moves should be entered into either your moves-management system (like Salesforce, for instance) or your own calendar.

### **A Word about Recording Your Moves**

If there is one thing that almost all major gift officers and development professionals can agree on, it's how much they hate going into their databases to record the "moves" they have made with their donors.

Unfortunately, many deal with this "hate" by NOT recording their moves. Instead, they keep a file of calls, visits, notes and information in their heads.

This is a problem.

How often have we had the experience of sitting across the table from an MGO and telling him, "Look, we understand this is difficult, but it's absolutely key that you get this information in the database." He nods, head down saying, "I know, I know... it's just that..."

Then come the excuses. We have heard them all. Perhaps you recognize them:

- "I have so many donor visits, I can't do all this paperwork."
- "I don't have time for this stuff – there is too much pressure on me to bring in the money."

- “I’m not good at details. Can’t someone else do it?”
- “This takes way too much of my time, how am I supposed to do my job if I always have to deal with entering things into the database?”

Yep, you are probably familiar with these. But, here’s the deal – it has to be done. However painful it is for you, it’s essential and critical that ALL your moves get recorded in your donor database. Here’s why:

1. **It allows you to know what you’ve done with your donors and where you want to take them** — You will not remember everything you’ve done with a donor. Recording your moves allows you to quickly figure out where you are in cultivating your relationship.
2. **Your manager will be able to review the work you have done each week** — This is important. You need to be managed, and this is one way he or she can check in on what you’ve been doing.
3. **You have a trail of work that proves you are managing your caseload** — What if your revenue goals for a certain month are not met? One way to show leadership you are not going to the afternoon matinee is a trail of all the work you have done. Remember, revenue goals are set to help you plan a strategic direction. Sometimes you don’t meet goals. But if you’ve done all the work, that’s all you can do. This proves that.
4. **It allows those who come AFTER you to know how donors have been cultivated and who donors really are** — This is probably the most important reason for recording your moves. It’s sometimes easy to forget, THE DONORS are NOT YOURS! They belong to the organization. Any time you don’t record a move, you are being selfish and self-centered. Imagine yourself in a new MGO position where you have to start working a caseload of donors. You look in the database and there is hardly any information recorded. So you start setting up meetings with donors, and it’s clear to them you have no idea how important they are to the organization or what they are really interested in. How does that feel to the donor? And how unfair is that to you, the new MGO?

Believe us, we know how hard it is to do this part of the work. Not every successful fund-raiser is detail-oriented. We can tell you all kinds of stories about our own struggles. But we’ve learned some tricks to pass on to you that should help:

1. **As an act of your will, either force yourself to record a move immediately after you have done it or take 30 minutes every day to complete this.** Put it on your calendar and stick to it. After a certain amount of time it becomes second nature.
2. **Find someone to keep you accountable.** Ask your manager to check in with you every week to make sure they are up-to-date. Ask a colleague to remind you. Someone in your life needs to help you do it.
3. **Ask your manager for admin help.** We firmly believe that non-profits short-change the effectiveness of the MGO by not supplying him or her with good administrative help. It

can be just what you need to give you more time to do what you do best. If recording moves is what you do best, then you're probably not an effective MGO.

If you can keep up-to-date and make sure your records are clean and have good information, it will help you and your organization cultivate, steward and solicit your donors in the proper way.

A well-maintained moves management database is the perfect complement to your year-long strategic planning in the MIC. Neither works as well without the other.

### **Does the MIC Force You into Monotony?**

Go ahead, admit it. Sometimes you go through periods when you just seem to be in a rut when cultivating your major donors. You end up doing the same thing day in and day out and it feels like you can't get out of it. And with all these points of contact you've just put on the Marketing Impact Chart, you may see a long line of tasks stretching out to infinity, threatening endless boredom.

Well, you're in luck. We're going to help you get out of that rut and start trying some new ways to cultivate your donors. Just because you've got similar-sounding tasks planned for each donor doesn't mean you have to do the same thing with each of them. We've got some ideas for you to break the monotony:

1. Discover a hobby or an area of interest for your "A" list donors. Find an article that you can actually cut out of a paper or periodical and write a short note with it, saying, "Came across this and thought of you." No, not an email link (although that is not the worst idea) – a real letter, hand-addressed, with a stamp on it. This is extremely important. It will totally surprise your donor (an attribute of *outstanding customer service*) and will endear him to you and your cause because you "took the time."
2. Create a small dinner party and invite different donors in your portfolio who enjoy meeting interesting people. Connecting individuals who either have similar interests (like your charity) or would benefit from knowing one other is a great way to create community with your organization's major donors. You have to be very careful with the invite list. Keep it small and intimate, yet relaxed and casual. This is also a great opportunity to put your CEO in front of your donors and get feedback. When your donors "hit it off" they will remember how they came together... YOU!
3. Introduce your donors to another charity they would be interested in. Is this crazy talk? No, remember, the expectation your donor will have is that you will only want to talk about your own wonderful organization. But if you are truly trying to help your donors support their passions and interests, then you are looking beyond your organization as well. You know your donors support other organizations, so be proactive about it. If you have some really good information about a cause they care about, they will be blown away that you are sharing it with them.

4. Send a handwritten letter telling the donors how they made a difference. Yes, take a pen, get some good stationery from your organization and proceed to write a nice letter with a story. If you have a photo to send, even better. We cannot understate the impact of a personal, handwritten letter. The donor will feel extremely honored and special.
5. “Thank you bomb” your donor. Okay, that term is made up, but you’ve heard of people who “photo bomb.” This is when someone tries to surprise a photographer by suddenly appearing in the background of a photo and doing something crazy. Well, use the same concept to thank your donors. “Thank you bombing” is really just surprising your donors and thanking them for no apparent reason. You pick up the phone or send an e-mail that says, “Mary, I was just thinking about you and wanted to thank you for supporting us. You have been so great to us over the years. Thank you.” We’ve had MGOs do this and the responses and conversations they’ve led to have been amazing. It’s gold.

### **Will the MIC Really Make a Difference?**

You still may be asking yourself, “Is this worth it?” Our answer is a resounding “YES!!” In almost every case where MGOs initially complain to us about having to go through this process, they come back and tell us this is the greatest tool for them to stay on track and ultimately be successful.

And actually, those who still complain about it don’t last very long as MGOs. This is a fact.

The beauty of this process is that YOU can start it right now. It’s doesn’t matter where you are in the year. Get going on it. It will be the best tool you have ever created for yourself.

[Click here](#) to request a copy of the Excel template for the Marketing Impact Chart, if we haven’t already sent it to you. And if your whole department needs some training or outside management to get your started, just let us know.

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*Veritus Group is a full-service mid and major gift consulting agency serving non-profits all over the world.*

*We help create, build and manage major gift and mid-level giving programs by combining donor-centered strategy with solid management that is focused on accountability.*

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