Call Time Fundraising 101

General Process:

1. Research potential donors
2. Call them
3. Follow up with email, letter, and/or another phone call later in the campaign
4. Take donations
5. Track results
6. **Thank them!**
7. Repeat

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1. **Researching potential donors.**
    a. Start with who you know: family, friends and your professional network.
    b. After that initial Friends & Family list has been tapped, move to friends of friends, ideological donors, and other universes.
    c. Research contact information and amount you plan on asking them for.
2. **Call them.**
    a. Call donors when you have the best chance of them answering.
        i. If you are calling a retired-age donor, call their home during the day.
        ii. If you are calling a working mom, call their home in the evening.
        iii. If you're calling a work phone, probably best to call that during working hours.
    b. Make a script and stick to it.
    c. Always make an ask!
        i. Have a plan for how much you will ask for from each donor before picking up the phone.
    d. Best practices:
        i. Be confident. Your confidence will inspire others to believe in you.
        ii. Smile when you are on the phone, people can tell.
        iii. Ask questions and be an active listener to the responses.
        iv. Make the hard ask and then wait for their response.
3. **Follow up.**
   It is important to always send a follow up, which the type and tone will vary depending on the result of the call. For example: if they pledge to donate and didn't donate over the phone, send them an email with an easy link to the donation site.
4. **Taking donations.**

Be prepared to write down a donor's information while on the phone. It can also be helpful to pass the phone to staff during call time so they can gather the information.

a. Printed donations page.
    i. A pre-printed donation page will help you make sure you gather all the necessary information.
b. Donation link on website
    i. Follow the steps to donate on line as the donor provides their information to you.
    ii. These days it is pretty simple to have an easy to remember link to your donation site like www.VoteSarah.com/Donate.

5. Track results.
You'll probably have to call folks a few times to have a substantial conversation and donor conversion. Always good to know when the last time you called them was and any notes from that call.
    a. Keep track of each donation: name and amount donated.
        i. This can be useful when going back through your list to ask for another donation- or on future campaigns.
    b. Keep track of pledges to donate.
        i. This will help you anticipate how much money is coming in the door as well as allow you to easily remind people to get their donation in.
6. Thank them!
    c. Thank You email
        i. Can be sent as a mass email to everyone who donated during a certain period of time – like that week.
    d. Thank You postcard
        i. Pre-printed postcards with a quick message from you. All you have to do is sign them and put a stamp on them.
    e. Thank You letter
        i. A more formal thank you letter can be printed and sent out. These can be sent out in batches to people that donated during a certain period of time.

Other considerations:
Before you begin accepting donations, it is importation to consider what type of donations you want to accept. Make sure that who you are accepting money from individuals, organizations and businesses that reflect your campaign's values.