



TELEFUND NZ

J Lyon Consulting

Telefund NZ

- ▶ The advantages of tele-fundraising
- ▶ The three things you must do
- ▶ The three things to avoid

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▶ Tele-fundraising what are the advantages?

- ▶ Diversified income stream
- ▶ Diversified communication channel – people prefer different ways/styles
- ▶ Immediate Feedback about your charity, both good and bad – allows for small celebrations or tweaks in the system
- ▶ Less time consuming than other fundraising channels, e.g. writing grants, DM and EDM
- ▶ Admin check – keeps your CRM/database up-to-date
- ▶ It gets results

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- ▶ **Client A: Healthcare Charity - Never Had a Regular Giving Programme**
 - ▶ 12% conversion rate
 - ▶ ROI year 1 – 2.32

- ▶ **Client B – Advocacy Charity - Petition conversion**
 - ▶ 6% conversion rate
 - ▶ ROI: 1.23

- ▶ **Client C – Advocacy Charity – Bequest**
 - ▶ 14 confirmed meetings
 - ▶ 4 confirmed bequest
 - ▶ 51 bequest brochures

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- ▶ Stewardship – regular communication, newsletters and e-newsletters, direct marketing, events
- ▶ Annual survey
- ▶ Brand and community presence
- ▶ Reputation
- ▶ Tidy database with touch points
- ▶ Tracked donor journey and communication style was appropriate for where there donors were in that journey.

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- ▶ **What are the 3 most crucial things to do?**

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▶ Your charity

- ▶ External lead generation – research, share and ask
- ▶ Keep an open mind, encourage sceptics, nurture your board, have a positive mindset both individually and as a team
- ▶ Understand that your own experiences and skills will not necessarily translate into something that will work on the phone.
- ▶ Good quality data – at each touch point with your donors, capture essential information
 - ▶ Alternative phone numbers
 - ▶ Address details correct
 - ▶ Email address correct
- ▶ Good stewardship
- ▶ Timing – tie your telefundraising in with events you may be running, or any other communication you may have

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- ▶ **Telefund NZ**
- ▶ Recruit carefully – not everyone is good at ‘selling’, asking for money requires confidence
- ▶ Good introduction and training sessions
- ▶ Use a well-written and structured guide:
 - ▶ with a compelling urgent call to action
 - ▶ open ended questions – develop rapport
 - ▶ facts and statistics that are relatable
 - ▶ Assumptive asks
 - ▶ Objection handles
- ▶ Have established targets for tele-fundraisers to aim for
- ▶ Have a team leader who leads from the front and guides fundraisers during testing times and motivates staff.
- ▶ Have regular coaching and ‘barging’ sessions

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- ▶ **3 Things to avoid in your tele-fundraising campaign**

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- ▶ Stopping a campaign after a short length of time
- ▶ Using very old data that – records that haven't had any relationship with your charity for at least 4 years
- ▶ Expecting volunteers to be great tele-fundraisers



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