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Philanthropic Sales & Fundraising

Content

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Welcome

Over the past 5 years, the world of fundraising or, as we prefer to call it Philanthropic sales, has changed dramatically and asking for charitable contributions and/or corporate sponsorship has become increasingly competitive and evolved. It now requires an advanced skillset beyond features and benefits.

Yes, ‘selling’ is still an important part of raising philanthropic dollars but the latest neurological research has shown that 95% of all decision making is made in the emotional / irrational part of the brain. In short - the philanthropic sales person still needs to be able to build a compelling solution - demonstrating value and a social return on investment. More importantly, they need to emotionally engage the donor into the solution otherwise the deal becomes stuck in the pipeline, usually soon after the proposal has been submitted.

Salecology understand the nuances of community benefits provided by charitable organisations and have helped philanthropic sales professionals master their profession, outperform their competitors, and achieve sizeable, double digit growth.

This brochure outlines the 3 key stages of philanthropic selling and highlights the various aspects of the programme that will help you master this field and maximise your performance.

The Art and Science of fundraising

Introduction

What is the programme?

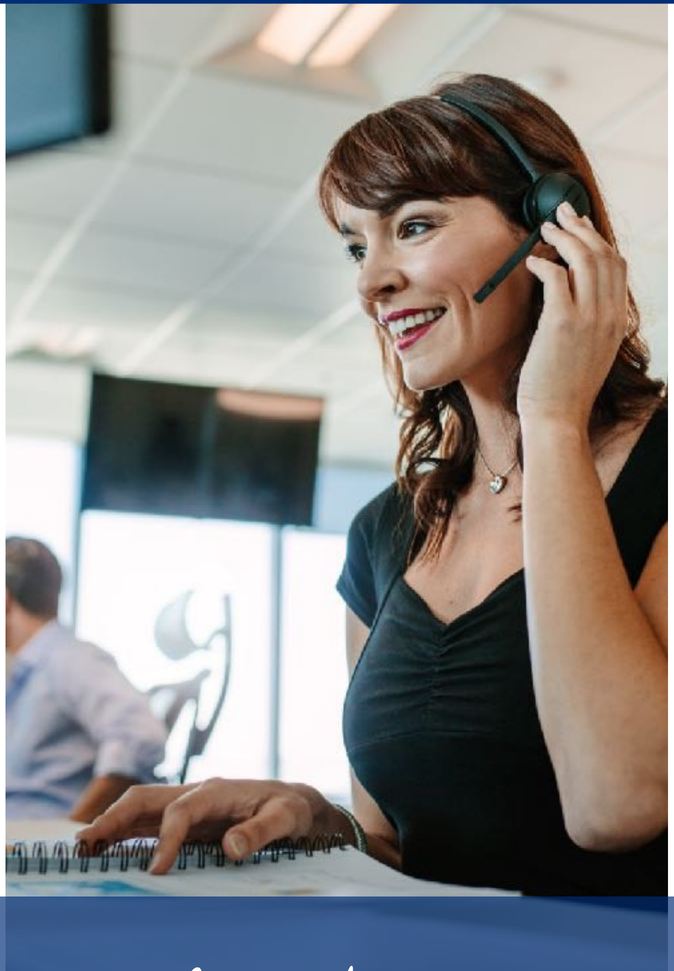
This Philanthropic Sales Mastery Face to Face Solicitation Programme is designed for fundraisers in roles such as Principle Gifts, Major Gifts, Gift Planning, Corporate Giving and Sponsorship. It covers all as aspects of the philanthropic sales world surrounding selling charitable solutions and benefits from the **HUNTER** mentality of finding new prospects to the **FARMER** mindset of cultivating existing donors; from renewing and upgrading existing annual gifts and pledges and cross sell opportunities.

The programme is divided into 3 cores elements:

- **Opportunity Creation - generating new opportunities**
- **Opportunity Management - Managing complex deals**
- **Account Development - Growing accounts and renewals**

As part of the training, empirical research and behavioural science and psychology is used to reinforce the learning points and provide insight in to what separates great philanthropic fundraising professionals from the average performer. You will learn real applicable skills and behaviours that you can apply instantly to drive conversion and build bigger, better solutions for your customers.

Each element of the programme is designed to help you **OUTSELL the competition** and build lifelong donors. The 3 keys to success in SaaS and BI sales is to **RETAIN, ACQUIRE and GROW accounts**. This programme will help you do all 3!



Everything you need to be successful

Learning - Your Way

To enable you to get the best out of the programme we provide a learner journey that ensures that you not only learn the skills and methodologies for each part of the fundraising process, but more importantly you can successfully apply them in the real world.

We feel people learn best when they are in control of their own learning, therefore we provide a combination of learning materials and modules which are made up of elements of both self-paced learning and interactive classroom based elements. That way you can plough through the material or take your time - depending on your workload and available time. We provide you with a combination of:

- **Classroom sessions**
- **Webinars**
- **Videos**
- **Fieldwork**
- **Gameplans**
- **Checklists**
- **Reference Materials**
- **Email updates**
- **1-2-1 conversations with your coach.**

We separate education from application. The education part is delivered through our academy portal where you can read or watch videos to learn the content, and complete some online assessments to ensure that you retain the knowledge.

Application is where you will practice and apply the knowledge. This is undertaken in the virtual classroom and with your coach, but more effectively, we issue you a fieldwork book which will walk you through applying your newly found skills and behaviours in your own role and gain feedback on how you are progressing.

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Certification and Diploma

The Philathropic Sales and Fundraising programmes are accredited. Once you have completed all the modules on one particular part of the programme you will submit your fieldwork book for review.

Your certification and grade will be assessed against 4 areas:

- **Online Assessment scores**
- **Classroom observations from Coach**
- **Fieldwork book**
- **Recorded sales calls and Analysis**

Our Salecologists will be looking for 2 things:

- **Know what to do –** Reviewing evidence of your knowledge and understanding of the sales methodology and progression across the programme

- **Able to do it –** Reviewing evidence that you can actually use the methodology for the various modules

At the end of each programme section you will review your progress with your salecology coach. If you have met the required scores in the programme we will submit your scores to the Philanthropic International Sales Licensing and Certification Board or review and certification.

The certificates available are as follows:

Philanthropic Sales Professional - Opportunity Creation Certificate
Philanthropic Sales Professional - Opportunity Management Certificate
Philanthropic Sales Professional - Account Management Certificate
Certified Philanthropic Sales Professional Designation (CPSP)

CPSP Designation requires you to have passed all 3 of the programmes, combined with submitting a final assessment. Individual Certificates are available for each part of the programme.

Philanthropic Sales Development

Face to Face Solicitation

Core Learning Modules

Opportunity Creation

The opportunity creation element of the programme is targeted at helping you to acquire new prospect opportunities.

Module 1: Connect

This module focuses your attention on how to connect to the prospect and engage them into a conversation. If you are cold calling a new prospect or trying to get higher and wider across an existing donors – what are you going to say once they say hello? Is it going to be another philanthropic sales person trying to ask for more money – or are you going to grab their attention and make them want to talk to you.

If it is an existing donor– what are you going to say to focus their mind to have a wider conversation rather than a friendly chat with their donor account manager?

Module 2: Explore

This module demonstrates how to challenge the prospects' thinking and explore new opportunities with them. By understanding the difference between top performers and average philanthropic sales people will help you to unlock your capability to explore the prospects hot buttons and interests and help them realise the impact that they can have by supporting your organisation.

Having the prospect tell you their interests is one thing, but in real terms, people live with interests and not all of them get financial support. You will learn how to convert these interests into hot buttons or explicit desire to resolve them and help your prospect to understand how providing your organisation financial support, you will be ability return a social value on improving or resolving these community challenges they are interested in.

Module 3: Demonstrate and Commit

Selling community solutions means that at some point you have to sell! This module introduces how to match your organisations programs to meet the expressed interests of the prospect. You will learn why prospects object, how to spot genuine objections from negotiation tactics and how to overcome them. Learning how to advance the gift and getting the prospect to commit to ensure that you can close the meeting with clear next steps that will move you around the prospects donating cycle to the successful outcome you desire.

Key Learning

Module 1

- ✓ How prospects decide to donate
- ✓ Philanthropic Selling in today's world
- ✓ Linking the Sales Process to the prospect
- ✓ The 3 Questions that determine success
- ✓ 4 Parts of every Solicitation Call
- ✓ Networking knowledge
- ✓ Opening the Call

Module 2

- ✓ How to avoid asking at the wrong time
- ✓ How to build strong Needs
- ✓ Pro's and Con's of Background Questions
- ✓ Creating a burning platform for change
- ✓ Extending the Impact of the solution
- ✓ Building ROI metrics

Module 3

- ✓ The cause of most objections
- ✓ Pain and Gain Crib sheet
- ✓ Making compelling Benefit Statements
- ✓ Advancing the deal/gift
- ✓ Gaining Commitment

Opportunity Management

This high-impact section of the programme will manage the deal through the pipeline, help shape deals to win, sharpening presentations and hone influencing skills to bring donor agreement negotiations to a successful completion.

Module 4: Take Control

This module will introduce you to the Opportunity plan and how to complete it. Across the plan you will learn the 8 distinct areas that will show whether you are close enough to win the deal or if your competitor is in the driving seat.

In today's economic climate your prospect will want to know how your program(s) will provide a social return on their investment. This module will show you how to build tangible value and turn your prospect into a champion, on your behalf.

Module 5: The Pitch

Before presenting your proposal it is important to understand how the prospect is going to make their gift decision.

This module puts you in control by understanding and influencing the criteria and how to deliver your pitch to ensure the prospect is in no doubt that your proposition is the right choice to meet their needs.

Module 6: Negotiate & Close

Research has shown that many objections are caused by the philanthropic sales person's behaviour. This module will provide you with the ability to prevent objections before they occur and also demonstrate how to overcome them when they are presented.

On many occasions the deal is looking good, your prospects has more or less told you that it is a deal but then you are hit with 'Radio Silence'. The prospect stops taking your calls, doesn't respond to email and you just can't get hold of them. This module will tell you why this occurs, plus provides hints and tips to find out what is really happening.

Key Learning

Module 4

- ✓ Is there a deal to be won?
- ✓ What goes into an Opportunity Plan
- ✓ How to build tangible metrics and a solid case for support
- ✓ The difference between a Coach and a Champion
- ✓ Spotting and building Champions

Module 5

- ✓ Uncovering Decision Criteria
- ✓ Shaping the Deal to Win
- ✓ Presenting your proposal
- ✓ Demonstration pitfalls
- ✓ Trial Management

Module 6

- ✓ Coaching your champion
- ✓ Different Types of Objections
- ✓ How to minimise Objections
- ✓ What to do when prospects go quiet
- ✓ Closing Techniques

Account Development

Account development looks at key aspects of your accounts to understand where you are in the relationship ladder, the contacts you currently have and ways to grow and nurture your accounts.

Module 7: Philanthropic Sales Planning

This module takes a holistic view of your revenue targets, philanthropic sales KPI's and supports you in building a territory and sales plan to get you there.

Learn how to achieve your revenue targets by analysing the different variables across areas such as: retention rates, ask amounts and case for support and build a strategy to drive growth across your organisation.

Module 8: Account Mgt or Development

Understanding the difference between account management and development helps the Philanthropic Sales Professional prioritise their time and effort on the right accounts.

This module takes a deep dive into your accounts and utilises our DEVELOP process to show you how to spot new opportunities within your Donor pool and how to build strategies to unlock them.

Module 9: Building Powerful Relationships

In various prospect relationships different roles become involved in the donating process. Identifying who has influence, power and authority is key, but also being able to forge and build relationships with key decision makers is notoriously hard but vitally important.

This module, as well as all the other modules in the programme, focus on the Emotional Intelligence that top performers have to connect with their customers, teaching you how to leverage your champions and how to gain introductions across the donor and prospect pool.

Key Learning

Module 7

- ✓ What goes into a solicitation plan
- ✓ Statement of intent - goals setting
- ✓ Pipeline and gap analysis - full year plan
- ✓ Territory plan
- ✓ Account Prioritisation
- ✓ Contact Strategy

Module 8

- ✓ Developing implementation plans for new opportunities
- ✓ Evaluating impact of organisational programs
- ✓ Building recovery plans for at risk accounts
- ✓ Capturing metrics and success stories
- ✓ Building an Account Development Plan
- ✓ Spotting white space opportunities

Module 9

- ✓ Mapping Authority and Influence
- ✓ Leveraging your champion to gain introductions
- ✓ Moving up the Relationship Ladder
- ✓ Relationship building without a Hospitality budget
- ✓ Prospect management and accessing the Powerbase

Tailor & bespoke programmes for your sales organisation

Maybe you already have a sales process that you use internally, or perhaps you have just designed and implemented a new competency framework for your organisation. In either situation it's essential that you, the organisation and the individuals taking part get the most out of any sales development and enablement programmes.

There's no denying that a bespoke development programme, focused around your own products, services, industry and market is likely to reap the greatest benefits. A programme that uses your language and is precisely aligned to your charitable organisation is going to yield the most valuable information for you and your team to work with and take action on.

We can tailor and bespoke these, or any other of our programmes, for a wider rollout across your team or organsiation. Please do not hesitate to contact our customer success team to discuss your requirement in more detail.

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TESTIMONIALS

“In the charitable sector Sandy, has few equals in fundraising experience. At an unprecedented time of change it is his grasp of national, federated, organisational evolution that sets him apart as a leader and a visionary. A professional who exists to execute change management, whose brain is strategically structured but his boots are always on the ground in the trenches. I also deeply admire how he has made time to hire, support, mentor and promote young professionals for many years.”

Paul Nazareth
Vice President
Canadian Association of Gift Planners

“One of the many talents that Sandy has is his strategic thinking. He has a tremendous ability to develop a strategic plan to solve your problem or accomplish your goal that brings not only outstanding results but is a model for future decision making and planning”

Lois Krause,
Former President & CEO (Retired)
North Bay Regional Health Centre Foundation

“Sandy is a clear and concise communicator. He is excellent with managing board meetings, is exact with details, and is a creative energy force with excellent follow through of ideas. His commitment to the causes he is hired for is outstanding..”

Mike Cumberland
Education Professional & Musician

“Sandy's work for the ROM as VP and Campaign Director for the ROM Foundation demonstrated his abilities as a fundraiser, campaign manager and as an individual who gets the job done.”

Meg Beckel,
President & CEO
Canadian Museum of Nature

We have delivered over $2bn of value to our clients

KROLL
uOttawa
Infinity
argus
UNIVERSITY OF WATERLOO
ORACLE
informa
bob
Datasite
wisely.
Symantec.
perkbox
XpertHR
GAGGENAU
Nestlé
Travis Perkins
SOLVAY
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Sony Centre
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Award-Winning Partner

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CorporateLiveWire
GLOBAL AWARDS
2022
★★★★★
Sales Training Provider of the Year

UK ENTERPRISE AWARDS
2022
★★★★★
Best Remote Sales Development & Consultancy

TOP SALES AWARDS
2021
★★★★★
Best Sales Assessment Tools

UK ENTERPRISE AWARDS
2021
★★★★★
Leader in Sales Force Emotional Intelligence

PERSONNEL TODAY AWARDS
2021
★★★★★
HR Supplier of the Year

PERSONNEL TODAY AWARDS
2021
★★★★★
Learning & Development Award

EUROPEAN ENTERPRISE AWARDS
2020
★★★★★
Best Sales Coaching & Consultancy

UK ENTERPRISE AWARDS
2020
★★★★★
Best Sales Consultancy

Salecology®

CONSULTING
TRAINING
COACHING
RECRUITING
ASSESSING

Salecology is your partner that applies behavioural and brain science to revenue generation programmes and services to improve your relations with your prospects, customers, donors, and to ensure you earn more revenue.

Our proprietary 'Salecology' provides you behavioural insights for your daily work with a focus on data-driven sales, customer / donor experience, marketing, communications, talent management and recruitment.

Not only do we provide consulting services, we also provide you training services and develop customised packages to get your team up and running in the behavioural psychology, neuro-sales, and neuro-fundraising methodology.

Salecology can guarantee you sustainable long-term success...

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