

Major Gifts

Following-Up A Presentation Of A Proposal:

Suggestions Regarding The Most Desired Timing & Process To Follow-Up A Proposal Already Made To A Prospect Where The Final Decision Is Still Pending

In broad terms, the timing and process just right to follow-up a pending proposal is naturally dictated by the “comfort level” of your association which enables your instincts to tell you when and in what manner to proceed, so as not to be intrusive and annoying to the prospect.

In specific terms, what you were told during the proposal presentation regarding decision making, possibly covers these three scenarios as the prospect:

- 1) Cited a duration of time, such as a few days, weeks, or even months, to an explicit calendar date, when they will make their decision known to you.
(Remember, even though we want the funds now, it is still up to the donors to determine when it is best for them to give.)
- 2) Indicated they will think it over, and will let you know at the appropriate time
- 3) Requested that you resubmit your request at a later time

Those three scenarios, and other variations, could be addressed at the appropriate time by utilizing one, combinations, or all three of the following:

- A) Contact the prospect and simply and directly seek their response
- B) Telephone or send notes of appreciation for their thoughtful consideration of the request, and briefly cite again the main points of the program. Reiterate the applicable “membership” gift opportunity related to their gift, offer a site visit, etc.
- C) Initiate an “informational” follow-up contact, providing to your prospect up-to-date fundraising news and reports which would be bolstering and compelling as they are making their deliberation. Talk about the encouraging results of the fundraising program to date, and that they can be part of the success.
- D) Use a sense of “closure” as well with the coming end of the fundraising program, and that their commitment now will ensure its success.