

# What's in a phone script?

By Joseph H. White, Jr.

*In the following article, veteran telephone fundraising specialist Joe White critiques the three sample scripts appended to this text. These are actual scripts that were used in nonprofit fundraising campaigns. Only tell-tale names have been changed to conceal the organizations' identity.*

## **Critique of Sample #1**

There are a number of problems with this script. First, the wording is awkward. Take the first sentence as an example: people don't speak like this. Thanking donors at the start of a phone script is basic and required. Making assumptions about what donors "know" is a mistake ("you no doubt know"). Instead, use the personal connection to deliver something different, new, and interesting. Lots of donors don't read your direct mail or newsletters or those precious letters you sweat over so long!).

This script does not engage the donor—it is all about what the charity is doing and the script tends to whine on. The sentences are TOO long: 39 words, 27 words. Shorten your sentences, be conversational. You lose donors with scripts that drone on like this one.

The first Ask is third person. What a waste! Fundraising is people asking people. What exactly does "reach out to more animals" mean—getting their email addresses?

I would prefer the script helping the caller to make a personal connection with the donor, such as "We really appreciate your support of our programs to help animals we both love. Do you have a companion animal, a dog or cat?" Using this technique helps make a human connection. Callers just have to make sure not to lose control of the phone call by letting the donor chatter away for 20 minutes about Fluffy.

The wording of the second Ask is awkward. When you write phone scripts take a few minutes to read them out loud to pass the "conversation test." Would you really say something like this? Scripts need to provide callers with support. Concise language that can frame the discussion. Finally, the script just continues to be all about the organization. I don't think there is a single "you" in this script. It should be full of phrases such as "You understand." "You helped make this possible." "You love animals." "Thank you, you, you."

## **Critique of Sample #2**

I don't think calling people for "a brief update on our work" is very compelling. In this script, why not lead with "I'm calling to talk to you about the pending increase in electric rates. The

increases are outrageous.” Interject some emotion—that's what turns people on.

It's good to remind donors (especially lapsed ones like those addressed in this script) that they have benefited (saved money) because of the group's efforts.

\$10 billion is hard for most people to grasp. Instead, I'd say “FREE HYDRO has saved ratepayers like you and me about \$120 per year.” Wow! This gets their attention and their gratitude.

The first sentence in the 3rd paragraph is 52 words long! This does not resemble any conversation I'd be likely to get into. See if you can shorten this sentence, make the information punchier. For example: “FREE HYDRO is working to help YOU by suing in court if we have to. We're lobbying the politicians. We're putting pressure on the decision-makers.”

When you're trying to come across as having a personal, one-on-one conversation, don't use the third person (“We are calling past supporters of FREE HYDRO and asking them to help with a generous contribution . . .”). Write instead something like “I'm calling you because you have supported us to keep utility rates down. I'm calling you for your help again now to . . .”

In the second Ask, don't apologize for asking for financial support. Be proud: you're working for a great and important cause. Make sure your scripts get this across. (What kind of statement is this? “. . . and I'd hate to miss them by not asking.”)

Try this instead: “This is a great cause. I'm sure if you were able to you might consider a gift of that amount. I'm sure we can find a good level for you.”

Notice the language “working to hold politicians accountable” vs. “we're holding politicians accountable.” Why double verb it? Be direct, assertive, proud, confident. People give to urgent, exciting, dynamic causes.

The third Ask is lame. I'd rather go right to “Thanks very much for your time. Before I go, will you match last year's gift of \$25 to help us make a difference?” You've done all the explaining and this person just wants to get off the phone by this time. Give her a chance to feel good, get it over with, make a gift.

### **Critique of Sample #3**

I like this script. It thanks the donor and reminds them of the goals and importance of the college. The next paragraph really sets the problem: the Board of Trustees raised fees and it is hurting low-income students. The script is short and uses nuanced language like “we have to do a bit more.” We can all do a bit more: not very threatening. The third paragraph keeps the focus on “needy students” and puts a date in the donor's mind: the end of December.

Mentioning the credit card in the Ask is almost assumptive—as though the donor has already agreed to make a gift and now it is just whether it is on MC or VISA.

The script keeps the focus on the students who benefit. This is the “feel good” approach. The script also makes very clear HOW the contribution is used—nice and concise with action verbs.

The second Ask uses a great technique: the “symbolic ask” which seeks to create a logical/emotional connection that makes it easier for the donor to nod “yes,” which is close to saying YES to a contribution.

The third Ask is right to the point: short. “Help us reach our goal.” “You can close the gap.” “You can put us over the top.” “Match your last gift.” These are all designed to make it easy to say YES.

Remember that 70% or more of calls end as refusals. Staying on the phone, connecting with donors on a personal level, and getting them nodding/agreeing during your call is what good fundraisers should do. The script is a tool that guides and offers them examples of language that can facilitate getting to Yes.

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**INTRODUCTION**

**Hello (PROSPECT), this is \_\_\_\_\_ calling from XYZ Agency on behalf of the Animal Group.** I'm a paid solicitor, and the XYZ Agency is a professional fundraiser, who will receive as costs, expenses and fees, a portion of the funds raised through this solicitation campaign. **This call may be monitored or recorded to ensure quality.**

**FIRST ASK**

I would first like to thank you for your past support of the Animal Group's work to protect animals. As a supporter of the Animal Group, you no doubt know about three unique ways in which we serve animals and the people who care about them. These are our Rescue Services team, our mobile programs which include adoption and spaying & neutering, and the hands-on work we do to make sure that even pets with behavior issues have the chance for a good home.

The Animal Group is unique among animal welfare agencies in having an entire department dedicated to mobile animal rescue services in the field. Our highly trained specialists respond to pets and wildlife that are injured, trapped in trees or on ice or by fire, and other dangerous situations. (Last winter, for instance, we safely extricated a kitten who had crawled inside a car engine and gotten trapped – we had to painstakingly take apart the engine!)

Our Rescue Team has an incredible arsenal of humane traps, nets, and other specialized equipment that no other organization in the area has.

Your support is vital to the Animal Group's ability to offer these important services. Would you help us reach out to help more animals in need in 2008 and renew your support with a gift of **(\$3xHPC or \$100)**?

**SECOND ASK**

I understand... (Repeat and reflect objection). That is a lot to ask, but we would not ask if the need were not so very great.

Two of the most critical tools the Animal Group has are our Spay Vehicle and our Mobile Adoption and Rescue Vehicle. What's unique is that they both take services out to people in their own communities throughout US State/territory/colony.

The Spay Vehicle is a mobile surgery unit that's dedicated to the performing spaying and neutering for low-income pet owners who could not otherwise afford these procedures for their pets.

We also have a specially equipped, state-of-the art vehicle called the Mobile Adoption and Rescue Vehicle that can safely and comfortably transport 43 animals at one time. We can use it to provide temporary shelter for animals during natural disasters and other emergencies. Right now we're using it to take animals out of the shelter to communities where they can meet people who might adopt them – and this activity will pick up as the weather gets nicer.

We are proud of the work we are doing – because it really helps animals- but we need your help. Can you help ensure we are able to continue these programs by renewing your support with a gift of **(\$2x HPC or \$50)**?

**THIRD ASK**

I understand.

In addition to our work in animal rescue, the Animal Group offers state of the art programs in animal behavior. We work with hard-to-place animals in our shelters to make them adoptable, and also with pets once they've gone home with new families. The worst thing that can happen to an animal is to be returned to a shelter – especially when often all that's needed is some counseling that will solve a pet's behavior issues, like food-aggression or separation anxiety, for instance. Our Pet Behavior Hotline is a free service where people can turn for help. We also offer behavior counseling, obedience classes, and our staff conducts workshops locally, regionally and nationally to show other shelters how to offer behavior programs, which really work.

Knowing that these programs provide badly needed services to pet owners that can keep pets from being returned to shelters and help make adoptions work out, can you help ensure we are able to continue our animal behavioral services by renewing your support with a gift of **(\$ (MRC or \$25)?**

**GIFT CLOSE**

**Great!** The best way to process your gift is on VISA or MasterCard– this way the Animal Group can put your money to work right away. Which card would you prefer to use?

**IF NO TO FIRST CC ASK**

I understand. The reason I asked for a credit card is that it's the most efficient way to process your contribution – there's less administrative time, paperwork, and postage involved and more of your contribution goes towards our programs. Would you help in this way?

**IF STILL NO**

That's fine. We'd be happy to process a check pledge. I'll send you a card and reply envelope in the mail. It will have space for your credit card information, if you're more comfortable giving that way through the mail.

***FUNDRAISERS: MAKE CERTAIN TO TAKE ALL CREDIT CARD INFO BEFORE RECORDING BEGINS***

**RECORDED CONFIRMATION OF PLEDGE AMOUNT AND TYPE**

Let me confirm this again please...

**CHECK:** You have agreed to make a [pledge/contribution/gift] of \$ \_ to the Animal Group. Is that correct? [*Note: must get a yes or no response.*]

We'll send you a card and reply envelope in the mail – it has the Animal Group logo (with the red barn) in the upper left-hand corner so you can identify it easily. May I count on you to return your gift within 3 to 4 days/the same day/the next day/within 2 days of receiving the envelope?

*Note: If initial timeframe is not possible: or [specific date 2 weeks from today/in 2 weeks]; 3<sup>rd</sup> ask is for [within 4 weeks or specific date 4 weeks from today]*

*Return date must be an exact time frame. If they do not make such a commitment, it is not a valid pledge and should be recorded as a refusal.*

**SAMPLE #1 — Fundraising Script — Lapsed Donor Reinstate / March, 2008**

**CREDIT CARD:** We'll send you a confirmation for your gift of \$\_\_ to the Animal Group. I have recorded that we will charge it to your [VISA/MC]. Is all that correct? *Must get yes or no.*

**ADDRESS CONFIRM FOR ALL PLEDGES:** And let me just confirm your mailing address. Are you still at [read address on screen]? *Must get yes or no.*

**CLOSE/DISCLOSURE YES:** Just one last thing -- I need to let you know that donations to the Animal Group are tax-deductible. Thank you again for your contribution.

**CLOSE/DISCLOSURE NO:** Thank you for your time (today/tonight), (Mr./Mrs./Ms Prospect). I hope you'll consider supporting us again in the future.

**INTRODUCTION**

**Hello (PROSPECT), this is \_\_\_\_ calling from Telemarketing for Change on behalf of the Citizens For Free Hydro.** I'm a paid solicitor, and the Telemarketing for Change is a professional fundraiser, who will receive as costs, expenses and fees, a portion of the funds raised through this solicitation campaign. **This call may be monitored or recorded to ensure quality.**

I'm calling to give you a brief update on our work, especially concerning the recent rate increases for Mega Edison and Giant Electro customers. Is this a convenient time to talk? I promise to be brief.

**FIRST ASK**

First of all, I want to thank you for your past support of FREE HYDRO. With the support of utility ratepayers like yourself, FREE HYDRO has had a long history of successfully fighting to keep electricity rates affordable for county residents. Since 1984, FREE HYDRO has saved customers about \$10 billion.

But now we face a new battle, and we need your help. You may have read recently that your Utility **(NOTE TO FUNDRAISERS: reference information on the dialer screen to learn whether the donor is a customer of Mega Edison or Giant Electro)** will be pushing for a rate increase (26%, \$160/year for Mega Edison customers; 55%, \$338/year for Giant Electro customers) because the utility is now purchasing power via an auction process. These are increases that many households simply can't afford.

So, FREE HYDRO is working in two ways: FREE HYDRO is working through the courts, appealing to the state appellate courts to overturn the hike, and as well pushing for legislation in State Capitol that will extend the current rate freeze another three years, to protect consumers from these unfair rate increases. FREE HYDRO is building a statewide coalition of community groups, residential customers, and political leaders to extend this freeze. But we need your help. We are calling past supporters of FREE HYDRO and asking them to help with a generous contribution of **[2x MRC, or \$100 minimum]**, making you a FREE HYDRO Consumer Champion. Is that something that you could do?

**(IF YES, go to CREDIT CARD ASK, below; IF NO, continue.....)**

**SECOND ASK**

I understand, that is a lot to ask for. I only start at that level because there are those who can help at that amount, and I'd hate to miss them by not asking.

As soon as word of these rate hikes came down, FREE HYDRO sprang into action in a way that no one else can: FREE HYDRO's Action Center on our website has information on citizen lobbying. We've been working to get word out about these unfair rate hikes into the press, and our working to hold politicians accountable to the needs of ratepayers all over the state, as opposed to utilities that are awash in profits right now, before any rate hike has gone into effect.

When the State Legislature created FREE HYDRO in 1984, aside from a small seed stipend, it was mandated that no state funds could be used to run the organization. So, we've accomplished all of our work through the generous support of rate payers like you, who understand that working together we can make a difference fighting rate hikes, unfair regulations, and many other activities.

Can you help with a contribution of **[1x MRC, or \$50 minimum]**,

**(IF YES, go to CREDIT CARD ASK, below; IF NO, continue.....)**

**THIRD ASK:**

I know there are a lot of good organizations out there, but we are asking because the need right now is so very great. If we don't do anything, these new rate hikes will go into effect on January 1, 2007. But we've seen in the past that when everyone works together, we can make a difference. If you could support our work with a small, \$25 contribution, it will go a long way to freezing these utility rates. Can you help at that level?

**(IF YES, go to CREDIT CARD ASK, below; IF NO, continue.....)**

**IF NO:**

Well, thank you in any case for your time, maybe you can help us at another time. Bye bye.

**CREDIT CARD ASK**

**1st CC ASK IS "ASSUMPTIVE":** Great – thank you so much! We're processing gifts today using [accepted credit cards] ... which would you prefer to use?

**2nd CC ASK IS "EXPLANATORY":** I understand. The reason I asked for a credit card is that it's the most efficient way to process your contribution – there's less administrative time, paperwork, and postage involved and more of your contribution goes towards our programs. Would you help in this way?

**IF STILL NO**

That's fine. We'd be happy to process a check pledge. I'll send you a card and reply envelope in the mail.

***FUNDRAISERS: MAKE CERTAIN TO TAKE ALL CREDIT CARD INFO BEFORE RECORDING BEGINS***

**RECORDED CONFIRMATION OF PLEDGE AMOUNT AND TYPE**

Let me confirm this again please.

**1) CONFIRM PLEDGE AMOUNT, TYPE and RETURN DATE (for check pledges)**

**CHECK:** You have agreed to make a [pledge/contribution/gift] of \$\_\_ to FREE HYDRO. Is that correct? *[Note: must get a yes or no response.]*

We'll send you a card and reply envelope in the mail – it has a *[describe envelope]* on the outside of the envelope so you can identify it easily. May I count on you to return your gift within 3 to 4 days/the same day/the next day/within 2 days of receiving the envelope?

*Note: If initial timeframe is not possible: or [specific date 2 weeks from today/in 2 weeks]; 3<sup>rd</sup> ask is for [within 4 weeks or specific date 4 weeks from today]*

*Return date must be an exact time frame. If they do not make such a commitment, it is not a valid pledge and should be recorded as a refusal.*

**CREDIT CARD:** We'll send you a confirmation for your pledge/contribution/gift of \$\_\_ to **FREE HYDRO**. I have recorded that you have asked to have it charged to your [VISA/Amex/MC] account. Is all that correct? *Must get yes or no.*

**2) CONFIRM ADDRESS:** And let me just confirm your mailing address. Are you still at [read address on screen]? *Must get yes or no.*

**3) DISCLAIMER / TAX STATUS LANGUAGE** (when applicable): Just one last thing -- I need to let you know that donations to FREE HYDRO are NOT tax-deductible.

**4) THANK DONOR FOR THEIR GIFT AND SUPPORT!** Thank you for your generous gift of \$\_\_ and for your support of FREE HYDRO -- your help makes our work possible!

**MAKE SURE THE DONOR HANGS UP FIRST!**

This is the college's 45<sup>th</sup> Anniversary. A great time to make a \$45 gift to Community College!

## INTRODUCTION

**Hello, this is (FULL NAME) calling on behalf of Community College Foundation.**

I'm calling to thank you for your support of the College and the Foundation. With your help last year we beat our goal of \$700,000 to support important college programs like scholarships and professional development – programs that keep our college a top-level institution.

Thanks to you and other generous supporters, the Foundation provided more than \$100,000 in Scholarships last year. Your generosity helps keeps COMMUNITY COLLEGE affordable for everyone who wants to attend. Unfortunately, this year the Board of Trustees raised fees that will cost the average student about \$30 per semester.

This year we have to do a bit more because the #1 reason students don't attend college or drop out is Money (financial circumstances). We want to raise another \$30,000 for Scholarships to offset the fee increase and keep needy students in college. I hope you can help before the end of December.

## TOP ASK (Make sure to ask high!)

**Can you join us by making a gift of \$100 (or \$50 more than last gift)? Your generosity will help a needy student with financial aid, or buy books for the library.**

**And, a lot of people find it convenient to put their gift on their credit card. The Foundation accepts Visa Mastercard, AMEX and Discover.**

**IF YES, go to CLOSE.**

## SECOND ASK (Give more good info / Restate urgency)

I understand – not everyone can help at that level but we have to ask just in case! **President Hammond has made it clear that a community college education MUST BE accessible to everyone.** So we need your help to make sure all students in the area have these opportunities. Here's how we use your contribution to the Foundation –

- Providing Financial Aid to students in need.
- Providing professional development for faculty and staff.
- Ensuring President Hammond has the funds for new academic programs and initiatives.
- Purchasing new books/journals for the library.
- Offering scholarships for older, non-traditional students.

For example, the Career Resource Center is available for students, alumni, and people in the community to explore career options. This is really important because 90% of

COMMUNITY COLLEGE alumni still live in the area.

Can the COMMUNITY COLLEGE Foundation count on your help tonight? Can you make a tax-deductible gift of \$45 in honor of our 45<sup>th</sup> Anniversary?

**IF YES, go to CLOSE.**

**THIRD ASK (Stay urgent -- give final, compelling reason to give!)**

**I understand. I'm sure we can find an amount that is comfortable for you – we want as many people as possible to participate. We are close to our goal and you can help close the gap before the end of the year. Can you help with a gift of \$30 (or match last gift)?**

**REFUSAL**

Mr/s \_\_\_\_\_, I do appreciate your time and hopefully you can help at a later date – we will continue to serve our fellow citizens in our community for many years to come. When you receive a letter – perhaps you can make a contribution at that time.

**CREDIT CARD ASK / CHECK CLOSE**

**Great, thank you so much for your gift of \$\_\_\_, it will really help.** Which (credit) card do you want to use today/tonight (COMMUNITY COLLEGE accepts MC, Visa, AMEX and Discover).

IF NO: Processing gifts on credit card allows us to put your money to work right away AND saves money because we don't have to sending mailings. (Wait for donor to respond).

IF STILL NO: I understand, we will send you a pledge notice in the mail. You should receive the envelope in 3 or 4 days – Can you please mail your check so we receive it before the end of December? Your gift is fully tax-deductible.

**1) CONFIRM PLEDGE AMOUNT – Repeat the GIFT AMOUNT**

**2) CONFIRM METHOD OF PAYMENT AND CREDIT CARD NUMBER**

**3) CONFIRM ADDRESS**

**4) THANK DONOR FOR THEIR GIFT AND SUPPORT!**

**FAMOUS LAST WORDS: Thank you so much for your help ... it means a lot to us!**

**ADDITIONAL INFORMATION / TIPS FOR SUCCESS**

- Know these names – Paul Hammond is President of COMMUNITY COLLEGE. Bill Hitchcock is Executive Director of the COMMUNITY COLLEGE Foundation. Diane Swenson is the Chair of the COMMUNITY COLLEGE 2007 Annual Fund Campaign. Molly Mattison is the President of the COMMUNITY COLLEGE Foundation.

- Contact name is Bill Hitchcock or Dottie Parsons – both can be reached by phone at 555.777.1600 if the donor has a question. Address is COMMUNITY COLLEGE Foundation, 270 Main Street, Charityville Massachusetts 01301.
- Gifts to COMMUNITY COLLEGE Foundation are tax-deductible to the full extent of the law.
- Budget of COMMUNITY COLLEGE (the College) is over \$17 million. Approximately 5,000 students attend COMMUNITY COLLEGE – mostly from Blue County but 25% are from Red County and 10% from nearby Mississippi and Utah.
- COMMUNITY COLLEGE was founded in 1962.
- The state has 15 community colleges; COMMUNITY COLLEGE is the smallest. Red County is the most rural area in Utah and the poorest.
- COMMUNITY COLLEGE lost over \$5 million in budget cuts from the state over the past few years.

You are NOT expected to know everything about COMMUNITY COLLEGE. Be honest with people you speak with – this is a small community! The Globe is the local community newspaper.