

# A **fresh** way to secure discovery visits

Turn cold calls over to trained professionals to  
increase development productivity

**O**kay, it's time to get fired up for your prospecting calls! You're seated in your cubicle; your call list is in front of you. You look around and can't see anyone over the cubby wall but you know they are there—your colleagues—listening as you prepare to make your first cold call of the day. The nerves set in. Will your discovery call list yield visits? If it does, will those visits be productive?

You scroll down the call list, hoping to choose someone willing to accept a visit from you. At the University of Florida (UF) Health Office of Development, the list is primarily made up of alumni who trained at the academic medical center or “grateful patient” leads. Experience tells us that, in most cases, the people on an institution's call list will fall into one or more of these categories:

- Have heard from you before and haven't responded.

- Have a connection with your institution, but your records aren't accurate. You won't reach them unless you do some research to correct their contact information.
- Haven't been called before—and, in the case of alumni, may not have been contacted by anyone from your institution for any reason in the 45 years since they graduated.
- Aren't excited by your call and can't wait to tell you that they know you are a



fundraiser and it's all about the money.

- Are happy to take your call—which is the group we hope will pick up the phone every time.

Let's face it, most development officers dread making cold calls. But there's no avoiding it—not if you're going to reach your yearly quota of face-to-face visits with potential donors. You've got your headset on and you stand up, look in a mirror to make yourself smile and think through your approach. Do you run the risk of sounding like a telemarketer by using formalities such as, "Sir, Ma'am, Mr. or Mrs.?" Or do you try to pretend you're a prospect's best friend? One misstep can derail the whole call.

### **Trained schedulers bring results**

The reality is that cold calling is necessary. It's the most logical place to start building a pipeline of potential donors.

But why does this task have to fall on development officers? Why not free them to focus on what they are very good at: building relationships, cultivating portfolios, meeting face to face with qualified prospects and soliciting and closing gifts?

That's what we did at the UF Health Office of Development, a shop of roughly 50 employees, including 15 development officers. We piloted a "scheduling and outreach" program in April 2014 in which we trained a young alumna to handle our cold calls. It was so successful,

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we implemented the program permanently in July 2014 and added a second caller (known as a “scheduler”). Our thinking is simply this: Let’s leave the cold calling to professionals who really know how to work the phones.

This novel concept minimizes the countless hours of preparation and rejection that development officers inevitably face when they try to secure appointments. Instead, skilled phone professionals devote 100 percent of their time to connecting with prospects, researching, updating prospect contact information and securing visits with people outside the portfolio of cultivated prospects.

The schedulers focus on prospects in the identification and

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## We see the future of our dynamic profession—the business of fundraising—to increasingly involve **leaving the art of cold calling** to trained professionals.

discovery stages—in other words, the hidden gems. At the UF Health Office of Development, our schedulers have identified major gift prospects, potential board members and other constituents with the inclination and capacity to give—and the pipeline

continues to grow every day.

We anticipated that the schedulers would save us time and secure more visits, but we discovered other bonuses:

- **Better records.** Part of the schedulers’ calling routine involves obtaining accurate

## Calling tips for better results

Here are some key strategies schedulers use for securing visits, provided by Degrees of Connection:

- Practice makes perfect. Leave yourself a message on your phone to hear how you sound. Would you return that voice mail? Call a friend, family member or coworker and role-play with that individual. Accept constructive feedback about ways to improve.
- Be comfortable with your role and mission. Don’t be quietly ashamed to be a fundraiser. Share your enthusiasm for your organization and the great things going on there. Feel proud of what you do when you pick up the phone and call to connect. Along the same

lines, be comfortable with your organization’s mission and goals, and be excited about sharing them with others.

- Rethink your attitude toward the “gatekeeper.” There is something magical about the so-called gatekeeper relationship. In fact, let’s not even use this common industry term. Instead, think of anyone you reach who isn’t the person you really want to talk to as your best ally. Changing the way you think about the person on the other end of the phone is key to your success.
- Have good energy during your calling time. When you are dragging on a call, people can hear this over the phone. Make sure you come across clearly and confidently.
- Practice overcoming objections. Review the objections you



hear the most and practice responses until you are comfortable with them. If you are honest and proud of why you are calling, your listener will feel it.

- Pick up the phone. Calling someone directly works much better than a text or email. On a live call, you can manage objections and build a rapport. You can’t do that easily when you’re not talking directly to the individual.

biographical information to update our donor database. Over time, call lists become more effective, adding to overall efficiency.

- **Fewer no-shows.** The schedulers confirm all appointments they've made before the development officers set out on visits. Before, when we made our own appointments, we often skipped the confirmation step—which wasted time and money if the prospect failed to show up.
- **Scheduler's "magic touch."** Schedulers, with their customized approach, have a way of getting on calendars. They might say something like this: "I'm calling on behalf of Harvey Green from our development office and he would like to meet with Dr. Smith for 30 minutes on October 22." Two schedulers setting up appointments for the people they represent can be a formula for success.
- **Staff development.** The valuable experience that our schedulers gain allows us to groom them for other development roles. Also, they can share their skills with everyone in our office, teaching us their techniques.

### The numbers tell a story

The scheduling and outreach program at the UF Health Office of Development is now in full swing and the numbers speak for themselves. Our analysis indicates that the probability of securing a discovery appointment increases tremendously by use of a scheduler, as shown in Table 1. In addition, as highlighted in Table 2:

- More than 60 percent of these visits were set by the

**Table 1.** Scheduler rates vs. industry average: Visits obtained per 100 calls

Average visits UF schedulers yielded	Highest yield of visits UF schedulers obtained (number of visits secured divided by number of recorded contacts)	Industry average yield of visits
14	33	10

**Table 2.** Measurable improvements from scheduler activities

Percentage of visits scheduler set on the first contact	Percentage of visits scheduler secured by phone (versus email or other methods)	Increase in development officers' annual visit numbers compared with previous fiscal year (before schedulers were added)
62%	92%	30%

- scheduler on the first contact.
- More than 92 percent of visits were secured over the phone versus email, snail mail or other methods of contact.
- The year-to-date development officers' annual visit numbers were 30 percent higher this fiscal year compared with last year.
- The officers secured several commitments of five to six figures.
- The schedulers made almost 800 updates to prospect records—updates that might not have been made at all the previous year.
- Within the first year, the program paid for itself.

Using schedulers allows development officers to be more productive overall—beyond what the numbers above convey.

- They become more efficient at planning trips.
- They log an increase in identification visits that build the donor pipeline.
- They close more gifts with discovery prospects.

### Objections to overcome

The scheduling and outreach program doesn't change your relationship with established prospects already in your portfolio. Your development officers might worry that schedulers making cold calls will cost them the "warm-up" phase of a meeting, but remember—schedulers are calling prospects who don't know the officer personally. Because skilled schedulers are adept at being informative but brief, they know how to efficiently introduce the officer, verify contact information

and set up a face-to-face appointment without prospects feeling they've said all that the officer needs to know.

When implementing a scheduling program, you may have to overcome a few hurdles. Sometimes, development officers may not be comfortable giving schedulers access to their calendar. After years of doing things one way, it can be hard to give up control.

Development officers must be highly organized and plan who they want called at least a month ahead of time. You also may need to adopt a new process that allows the schedulers to work more efficiently with the development officers' calendars.

Some officers may be hesitant to use this program initially, but once they see how many more visits are set up for those who participate, they recognize the program's value. It's important to reassure your team that the program enhances and complements their current prospecting efforts and that it is voluntary.

### Callers with keen skills and passion

To implement a scheduling and outreach program, you need to recruit or cross-train calling professionals (schedulers). At the UF Health Office of Development, we trained two alumni who had already worked in our office. If you can't hire a seasoned calling professional, you can train administrative assistants, secretaries, program managers or development assistants to systematically secure discovery visits. This staff member can track progress, reassess best practices and share his or her skills with the development officers who continue to make their own prospect calls.

Key traits to look for in a potential calling professional include the following:

- Experienced and comfortable working the telephone.
- A warm and polished phone presence.
- Interest in fundraising.
- Attention to detail—including ability to read maps, estimate travel time, accommodate development officers' preferences, etc., so visits are scheduled effectively.
- Good at follow-up.

- Collegial mindset; works collaboratively with development officers.

Scheduling and outreach programs have been implemented in a few development shops, in addition to the UF Health Office of Development. Whether your development officers are calling on grateful patients, alumni, former residents and fellows or "friends" of your institution, this program can be applicable to all.

We see the future of our dynamic profession—the business of fundraising—to increasingly involve leaving the art of cold calling to trained professionals. The trained callers we've worked with approach this job with refined skills, passion and a belief that they are doing important work. That's exactly what you need to get in the door with your constituents. 



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**Leslie Chambers** is president and chief executive officer of Degrees of Connection, a consulting firm that specializes in creating custom scheduling offices, securing visits and developing staff skills. She is formerly director of advancement at the University of Rochester, where she launched and managed a scheduling office that secured nearly 7,000 visits. Recently, she helped the University of Florida Health Office of Development establish a scheduling office.



**Harvey Green, CFRE**, is executive director of the University of Florida Health Office of Development, with oversight of the major gift and reunion giving programs. He is leading fundraising efforts for the UF College of Medicine's new medical education building and oversaw the college's \$50 million "How We Learn" campaign.