

INTRODUCTION

Hi, my name is _____. I'm a [Fr/So/Jr/Sr/Gr] at the University of Michigan calling on behalf of:

- (If **Single Unit Futures**): [S/C/U]
- (If **MULTI Futures**): the university
(**Never say you are a student from the unit if not true.**)

May I speak with [preferred name], please? (If prospect and spouse are graduates: ask for either.)

Great! I really enjoy speaking with alumni, so thank you for picking up.

RAPPORT & TRANSITION

I'm calling for a couple of reasons, but first, I would like to hear about your Michigan experience:

(3-5 minutes of rapport is good. Sound sincere and interested. Don't read the list. Select 1-2 topics to start. Use prospect's response for follow up questions):

- What brought you to U-M originally?
- What was your favorite part of going here?
- What do you remember most about your time here?
- When was your last visit to campus?
- What places do you like to visit when you're on campus?
- What activities or clubs were you involved in?
- What internships/study abroad did you participate in?
- Why did you pick your major/career? (*listen and ask follow up questions*)
- What impact would you say your time at Michigan has had on you?
- (For **MED calling pools**)
 - What is your most memorable experience from Medical School?
- (For **Non MED Graduate Degree holders**)
 - What courses did you get to teach while you were here?

1ST ASK

Thank you so much for sharing your story with me. I enjoy hearing the ways Michigan made a difference for someone. But another reason I'm calling is to mention the importance of alumni support, like yours, that makes Michigan such a great experience. As many as 20% of the most talented students who are accepted to Michigan choose to go elsewhere because of financial concerns. Your gift helps more students benefit from the Michigan experience, like you and I do, with scholarships and the Go Blue Guarantee. The need has never been greater. Will you be a Victor today with your gift of [1st ASK AMOUNT] to the [S/C/U fund]?

- If **"yes"**: Thank you! Will that be on a Visa, MasterCard, American Express or Discover?
 - If **"yes" to the credit card**: (*Verify home address, launch credit card page, proceed to matching gift ask, proceed to Close with Pledge*)
 - If **"no" to the credit card**: I'm asking you to give today on a credit card because (*select 1-2 reasons*):
 - You can make these funds available immediately for urgent needs.

ABOUT THIS LIST

- Future Donors have not made their first gift.
- **Records with a Gift History** made their last more than 6 years ago, or never made a gift to this unit.

DURING RAPPORT ...

- **Have a discussion**, not an interview.
- **Select 1-2** rapport topics. **Use their responses as follow up.**
- Alumni love talking about their school. **Use your Fact Sheets.**
- **Advanced Degree Grads** (e.g. MA, MS, PhD, MBA, M.D., etc.) have a different student experience than undergraduates. Be careful asking questions that are not relevant.
- If it's been 10 minutes and you have not made your first ask, **Take Control of Your Call.**

USE FACT SHEETS

Donors respond more positively with positive information. Refer to your fact sheets and newsletter so you can:

- better respond to questions
- sound more knowledgeable and informed
- share future unit improvements

- You will help the University be greener and more environmentally friendly.
- Your information is secure. The University does not store your payment information.
Would you help me today and make your gift by credit card? (YES - Verify home address, proceed to matching gift ask, proceed to Close with Pledge)

- If “no”: LASC (Listen, Acknowledge, Support, Continue)

2nd ASK – Recurring Gift

Note: Pick one ask amount only. The preset 2nd Ask is **bolded**. The other monthly amounts are provided should the Prospect ask or you grow more confident negotiating a recurring gift.

RECURRING GIFTS

Rounded monthly equivalent.
 Minimum \$5/month, credit cards only.

	Gift Amount	Monthly
Upgrade	\$200	\$17
2nd ASK	\$130	\$11

Objection	Example Response
Usually Gives at a specific time	Thank you, we do appreciate your support at any time! However, I can make giving easier so you don't need to plan your budget around one specific date, and your gift could benefit student all year long. Would you a monthly gift of just [2nd ASK MONTHLY] to [SCU fund] ?
No Budget/No Money	I understand. Making a large gift, all at once, can throw off a personal budget. But, there are other ways to make a positive impact for Michigan that may be easier on your budget. If I set up a recurring donation of [2nd ASK MONTHLY] , would that be more convenient for you?
Paying Off Student Loans	I understand. Making a large gift, all at once, can be hard sometimes because of other payments you are already making. However, there are other ways to give back. I could set up a monthly gift that will increase your impact for Michigan with less impact on your other budget. Would a monthly recurring donation of [2nd ASK MONTHLY] be more convenient for you?
Kids in School	It's wonderful to hear that you are able to support your children/grandchildren as they go through school. Tonight we are trying to generate help for students who don't have that kind of support, but want to receive the benefits of a Michigan education. I could also make it easier to share your support with a monthly recurring donation of just [2nd ASK MONTHLY] ? <i>**If their student is attending U-M, you could offer a fund in the student's school.</i>
Upset With UM	<i>**Try not to lead prospect into elaborating why they are upset with the university, but rather acknowledge their concerns while still supporting the university I'm so sorry to hear that you are upset (LISTEN AND RESPOND APPROPRIATELY).</i> I understand you might be upset with that part of the university. However, it is possible to direct your support to areas of U-M that you are more passionate. I can also make giving easier with a recurring monthly donation of just [2nd ASK MONTHLY] ?
General Ask:	Every contribution supports a student or program in need. I do want to find a giving level that is comfortable and convenient for you. Instead of making a large gift all at once, I can also offer the easy option of small, monthly gifts. Would you consider a gift of [2nd ASK MONTHLY] to the [SCU fund] ?

- If “yes”: Thank you! Will that be on a Visa, MasterCard, American Express or Discover?
 - NOTE: Recurring Gift Must Be on a Credit Card.
 - If “yes” to the credit card: (Verify home address, launch credit card page, proceed to matching gift ask, proceed to Close with Pledge)
 - If “no” to the credit card: I'm asking you to give today on a credit card because (select 1-2 reasons):
 - You can make these funds available immediately for urgent needs.

- You will help the University be greener and more environmentally friendly.
- Your information is secure. The University does not store your payment information.
Would you help me today and make your gift by credit card? (*Verify home address, proceed to matching gift ask, proceed to Close with Pledge*)

- If “no”: LASC (Listen, Acknowledge, Support, Continue)

DEMOGRAPHIC UPDATE

I certainly value your time and while I have you on the line I want to make sure our contact information for you is up to date so you do not miss out on important news and invitations from your school.

1. Is your mailing address still **[address]**?
2. Currently we have **[email]** listed as an email address for you. Is this still current?
 - a. (*If yes*): Great!
 - b. (*If no*): If we have an email address on file, it helps us communicate with you more effectively, especially since the university is working to be more environmentally friendly. What is your preferred email address?
3. Are you still working at **[employer]** as a **[job title]**?
 - a. (*If yes*): Wonderful, Thank you!
 - b. (*If no*): (*Use matching gift as a reason to update. Get current information. Search for the company during update if they provide it.*)

Note: See Matching Gift Ask section below for more details. You need a reason for each question. Matching Gifts is a reason for updating employer. If you update matching gifts here, do not repeat yourself at the end.

IF UNEMPLOYED...

"I'm sorry to hear that. I know some schools, and the Alumni Association, provide helpful job resources to alumni. Even long after graduation, you're part of the Michigan community! Have you checked your school's website?"

3RD ASK

Thanks for helping me update that. I promise I won't take up much more of your time, but I do want to stress that you can really help current and future Michigan students have the best experience and education at U-M. (*Refer to grid below for supplemental responses or the SCU Fact Sheet for other reasons or funds to donate to.*)

RECURRING GIFTS

3rd Asks are single gift amounts, but may be monthly if the prospect asks.

	Gift Amount	Monthly
Upgrade	\$100	\$8
3rd ASK	\$80	\$7

Objection	Example Response <i>You may also use Recurring Gifts as a negotiating tool.</i>
Usually Gives at a specific time	We definitely appreciate your contributions! Keep in mind there are scholarships, internship stipends, building renovations and technology upgrades that occur year-round and would never be possible without private support from alumni like you. Would you be willing to move your donation up a little earlier with a smaller donation of [3rd ASK AMOUNT] to [SCU fund] ?
No Budget/No Money	I understand. U-M is committed to delivering the best education available while keeping it affordable, but that is challenging as state support used to be as high as 74% and is now only 16% of the university's costs to use toward classroom resources, student services or academic programs like tutoring. Would you be able to contribute a smaller amount of [3rd ASK AMOUNT] to help the students in [s/c/u] ?

Paying Off Student Loans	I understand that. But it doesn't take a large amount to make a difference when combined with hundreds of other donors giving what they can. Joining other alumni increases the impact of your gift. Knowing how important scholarships are now, and after graduation, would you help me tonight with a gift of just [3rd ASK AMOUNT] to the [SCU fund] ?
Kids in School	It's wonderful to hear that you are able to support your children/grandchildren as they go through school. Tonight we are trying to generate help for students who don't have that kind of support, but want to receive the benefits of a Michigan education. Would you be interested in helping a deserving student with a smaller gift of [3rd ASK AMOUNT] ?
Upset With UM	<p><i>**Try not to lead prospect into elaborating why they are upset with the University, but rather acknowledge their concerns while still supporting the university I'm so sorry to hear that you are upset (LISTEN AND RESPOND APPROPRIATELY).</i></p> <p>I understand you might be upset with that part of the university. However, you can control where you donation is used within the university. You can direct your gift to something more comfortable for you, or use your gift to help make the change you would like to see. Knowing the impact of your support to U-M, would you consider a smaller gift of [3rd ASK AMOUNT]?</p>
General Ask:	Every single alumni contribution goes towards something essential for students. Whether that be tuition or books or lab equipment, all of these things are made possible in part through alumni support. This is a great opportunity to be the difference for a current student like me. Would you consider a gift of [3rd ASK AMOUNT] to the [SCU fund] ?

- **If “yes”:** Thank you! Will that be on a Visa, MasterCard, American Express or Discover?
 - **If “yes” to the credit card:** *(Verify home address, launch credit card page, proceed to matching gift ask, proceed to Close with Pledge)*
 - **If “no” to the credit card:** I'm asking you to give today on a credit card because *(select 1-2 reasons):*
 - You can make these funds available immediately for urgent needs.
 - You will help the University be greener and more environmentally friendly.
 - Your information is secure. The University does not store your payment information.
Would you help me today and make your gift by credit card? *(Verify home address, proceed to matching gift ask, proceed to Close with Pledge)*

- **If “no”:** LASC (Listen, Acknowledge, Support, Continue)

4th ASK

It's been great speaking with you Mr./Mrs./Ms. _____. Before I let you go I would like you to know that last year over 50,000 individual alumni donations of \$35 or less added up to \$790,000 in scholarships and student support to help thousands of students and academic programs. Every dollar really does count – will you join your fellow wolverines with a small, **one-time gift** of **[4th ASK AMOUNT]**?

- **If “yes”:** Thank you! Will that be on a Visa, MasterCard, American Express or Discover?
 - **If “yes” to the credit card:** *(Verify home address, launch credit card page, proceed to matching gift ask, proceed to Close with Pledge)*
 - **If “no” to the credit card:** I'm asking you to give today on a credit card because *(select 1-2 reasons):*
 - You can make these funds available immediately for urgent needs.
 - You will help the University be greener and more environmentally friendly.
 - Your information is secure. The University does not store your payment information.
Would you help me today and make your gift by credit card? *(Verify home address, proceed to matching gift ask, proceed to Close with Pledge)*

- **If “no”:** LASC (Listen, Acknowledge, Support, Continue, then proceed to Close with No Pledge)

MATCHING GIFT ASK

*(Note: If you updated prospect **and** spouse in Demographic Update or Specified Pledge, do not ask the same questions.)*

Does anyone in your household work for a company that matches charitable gifts?

- *(If yes):* Great! Your HR department can provide details on filing your matching gift claim. It is usually quick, easy and online.
- *(If no):* That's OK. Your gift is sincerely appreciated!
- *(If 'I don't know'):* That's OK, I have a list of matching companies. I can look that up for you right now.
- *(If they're retired):* Some companies do match their employees' gifts long after they've retired. I can look that up for you right now.

CHECK MATCHING GIFT

There are 3 places in CampusCall to identify a matching gift company:

- In the prospect's demographic info, where it says "Match"
- In the User Fields tab, where it says "Employer Match?"
- Use the Edit button on pledge screen or Matching Gift under Actions to search for a company.
- **Be proactive.** If prospect knows their company gives free money, they will be more open to giving.

CLOSE WITH PLEDGE

Once again, thank very much for you for your gift of \$__. By showing your support, you are a victor for Michigan every day.

(Missing email address):

To help reduce our impact on the environment and make the process easier, the university has moved to e-receipts. What email address may I use for you?

- *(If Yes):* Thank you for your gift! We will get that receipt out to you shortly! Have a fabulous evening.
- *(If No or wants a receipt in the mail):* Not a problem, we can send you a paper receipt via regular mail.

Thank you once again for your generosity! Have a great evening and GO BLUE!

CLOSE WITH NO PLEDGE

Before I let you go, do you have any more questions for me? *(Listen and respond)*

Thank you again for your time. I hope we can count on your support in the future. Have a great evening and GO BLUE!