

## Phone Script guide

**Timing: 14 days after they have set up their fundraising page**

Charity tips:

- With a phone script, it's always important to tailor it to the person making the call:
  - o Use your own words and personality
  - o Give the fundraiser the time and space to speak
  - o Listen carefully to your fundraiser and acknowledge their statements
  - o These fundraisers are doing an awesome job for you. Genuinely thank them for their amazing effort (both in the event and with their fundraising).
  - o Check out their fundraising and Facebook pages so that you know a little about them, and can personalise the conversation a little more.
- Call your fundraisers who have registered again this year, and who raised significant funds last year
- Call your top fundraisers this year (i.e. those who have already fundraised a high amount even though the event is not over yet)
- Offer an incentive, such as a t-shirt, coffee cup or other charity branded gift:
  - o Don't have any incentives? Check out [www.redbubble.com](http://www.redbubble.com)
  - o Suggest a date to reach that target that is three weeks after the phone call.

### Opening intro:

Hi, my name is <Caller's Name> and I'm calling from <Charity Name>. You've chosen to fundraise for us in the <Event Name>. I'm calling firstly to say thank you. You're doing such a great job... I also want to see if there is anything I can do to help you.

### Checklist of things to say

- I really like your... Comment on their Facebook page/fundraising page – particularly if they have a great story, cool photo or interesting training update. They will be chuffed that you like it
- I wanted to let you know more about what your fundraising <will/has> achieved
- Tell a story about how the fundraiser's donation will make a difference. Reinforce as often as possible that the fundraiser is doing a great job.
- For last year's fundraisers – give thanks for last year: Last year you raised <\$ Raised Last Year>. Thank you so much for that. It really was an amazing effort you put in.
- If met target: You've already reached your target for this year. That's awesome! Congratulations



- You're so close to your target. You're doing a great job getting to your target this year.  
Thanks so much.  
Have you connected with our team page at our website – it's a great way to connect with others who are fundraising for us at this event?

### Offer incentive:

- For those who have not reached their target: If you reach your target by <Date> I'd like to offer you a <type of incentive> as a special thank you
- For those who have already met target: If you'd like to increase your target to <20% increase> and reach it by <Date> then I'd also like to offer you a <type of incentive> as a special thank you.

### Checklist of things to ask

- Is there any information I can send you (by email or post)?
- Do you have any questions for me?
- Is there anything else I can help with?

### Closing the call:

And again, my name is <Caller's Name>. If you have any questions, please call us and feel free to ask for me.

<First Name>, thanks again for choosing to raise money for <Charity Name> at <Event Name>.  
On behalf of all the team here, and the <people/animal/cause> we help, thank you.

It's been great to speak with you today. Thanks again.

Goodbye.