

## RESEARCH

### **KNOW YOUR AUDIENCE**

It's important to be equipped with as much relevant information as possible ahead of a meeting, especially going into a pitch. Taking a global approach to getting a sense of Mary's giving habits outside of P2P, her profession, mutual connections, and more are an especially important element of cultivating donor relationships.

#### **Existing data**

- Use Salesforce (or other in-house CRMs), to review all past communications, donations, and any relevant data we have stored about Mary. Cross-check her giving trends and see if there are any notes from past engagement that could provide insight into her interests. Wealth management tools can help gauge her capacity for future giving and pinpoint other organizations she's supported, helping us frame our ask effectively

#### **News, google, social search**

- Great ways to find out what public-facing events Mary has attended, her general interests, discover mutual connections, profession etc

#### **Other giving data**

- Platform searches like GuideStar, or other public-facing giving sites (crowdfunding) or petition sites are quick, easy tools to learn more

#### **P2P engagement history & existing in-house connections**

- Cara's pre-existing relationship, on whatever level, with Mary is an important part of understanding Mary's interests and how her engagement with P2P began
- Checking event attendance and/or participation records

## MEETING GOALS

### CULTIVATING A MUTUAL, PRODUCTIVE RELATIONSHIP

Fostering a connection that encourages productive ongoing dialogue and collaboration is critical. It's about building trust and listening as much as sharing, and ensuring Mary – and any donor – feels her values and vision align with P2P's mission. By creating a space for open exchange, we can ensure she feels like a valued partner rather than simply a donor. This lays the foundation for deepening her involvement over time.

#### Understand Mary's values and interests (in her own words)

- Learning about Mary's values, interests, and philanthropic motivations will help better align our mission with her passions

#### Encourage and gauge interest

- Build on Mary's interests, values, and endeavors, and connect them with P2P's mission
- Gauge her interest in deeper involvement with P2P, such as hosting an event, or becoming a major donor through capital campaigns, special projects, or increased annual giving
- Encourage her to share her experiences with P2P and other organizations to identify common ground and opportunities for engagement





## THE MESSAGE

### WHY P2P MATTERS

Person to Person (P2P) matters because we focus on empowering families to get back on their feet, offering essentials like healthy groceries, clothing, camperships, and financial aid and casework support while promoting equity and treating everyone with dignity. Our community-supported food programs offer choice and respect, and we also help with rent, utilities, and scholarships to empower families for the long term.

For someone like Mary, who cares deeply about sustainable change and empowering others, partnering with P2P could be a direct way to ensure families thrive, helping them rebuild their lives with confidence and independence.

## NEXT STEPS

### RESPECTING LONGEVITY

Building lasting partnerships requires more than just a one-time conversation. It's about making Mary feel seen and appreciated as a long-term partner, not just a donor. We want her to feel like she's a key part of our mission's success and future growth.

#### Acknowledging commitment

- Respecting any donor's relationship is important. Acknowledging Mary's commitment and contribution over the years demonstrate mutual respect, and appreciation for her support

#### Make a mid-level ask

- Encourage her consistent giving, while outlining clear funding needs and how her increased support can help make a bigger impact, and achieve specific outcomes, ensuring she understands the significance of her contributions
  - It's always important to be equipped with a tiered ask, so if Mary is uninterested in increasing her annual gift, she could be invited to participate in an upcoming capital campaign or a specific goal-oriented initiative that aligns with her interests and giving capacity

#### Schedule a follow-up

- Following-up to discuss her thoughts, gather feedback, and maintain a relationship are critical to ensuring Mary feels valued (because she is!) and engaged in P2P's mission and process

## CULTIVATING A RELATIONSHIP

### CONNECTION, ENGAGEMENT & IMPACT

Fostering long-term donor relationships is essential for building trust and ensuring continued support. It's about making Mary feel seen, valued, and involved beyond her financial contributions. Engagement and personalized communication play key roles in deepening her commitment to P2P's mission.

#### Engage Mary based on her interests and network

- Tailor future communications and invitations to reflect her passions and involvement in the mission, with the organization, and in the community

#### Stay connected

- Through personalized outreach, such as sending direct updates on P2P initiatives, events etc

#### Create opportunities for deeper involvement

- Such as inviting her to exclusive events, encourage her to take on leadership roles, participate in special campaigns, programs and/or initiatives
- Create a sense of ownership in the organization by involving her in discussions about P2P's goals and initiatives, making her feel like a valued partner

