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"How to Solicit." February 1971.

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WORKER TRAINING:

"How To Solicit"

By Rabbi Herbert A. Friedman
Executive Chairman
United Jewish Appeal

I am very happy to have the opportunity to talk to you, the workers and the leaders of the campaign. I'm not going to deal with the needs of the campaign in this short message. I've done another message, which is available now in your federation office. That one deals with the needs, and why they're just as urgent today as they were months ago when we started the campaign.

I would like to talk to you now about techniques--not why, but how. One very clear conclusion has become apparent during the course of the early weeks of this campaign. The conclusion is that individual soliciting is a much better method of obtaining the very high increases we're seeking than relying upon meetings--even meetings with card-calling or small parlor meetings.

Meetings are fine for some specific campaign purposes: to rate cards, or to distribute cards, or to educate workers. You can even hold mass rallies to stimulate an entire community. I'm not saying meetings are bad per se, and have outlived their usefulness. What I am saying is that the old reliance upon a meeting to produce specific campaign results is no longer valid. The old theory used to be that, if you had a meeting, and you went in with a few gifts primed to set the pace, then everyone would follow suit. That was true for those campaigns in which we were seeking 10 and 20 percent increases. But, in a campaign where you're

looking for 50 and 75 and 100 percent increases--double or even triple the last gift--the meeting is not the way to achieve the results. The speaker has only a short time at the meeting. He's harassed by a lot of outside considerations. He can't explain matters in depth.

What is required is individual soliciting, not meetings. You must obtain personal interviews with every single large contributor. And in those meetings, you must take the time and the effort and the energy to explain exactly why you will need two, three, and four times your prospect's previous year's gift. It's not easy to organize these individual solicitations. It's not easy to get big givers to make appointments. It's not easy to get teams of people to go to see them. But only this way will you achieve the results for which we are all looking so desperately. After you have covered the big gifts, then you can decide whether a meeting is worthwhile or not.

I would like to go over with you ten simple rules which we have discovered. They are not the Ten Commandments, but they are ten rules of thumb which have emerged. On a practical and pragmatic basis, they represent the best, most efficient and successful routine for carrying out individual solicitations:

1. Use an official pledge card which has been rated by a valid committee. On the pledge card you put the giving history--what the man gave in previous years. The pledge card should include in large, black letters, the amount for which he has been rated. The rating has to be done by a committee which the man will respect. He must recognize the names of the people on it, so that's why I say a "valid" committee. It has got to consist of people in the community who have the right to suggest what

others ought to give. You do not go into any solicitation simply asking for more money, or a lot of money, or saying that "we need a lot." "Lot" and "more" and all such terms are abstractions, they're not concrete. "More" means one thing to the solicitor, and a different thing to the prospect. A number, however, is not subject to misinterpretation. You want a specific, rated amount.

2. Inform the prospect of that rated amount in the first sentence of your solicitation. Tell him you've come to see him about the needs of the campaign and the people of Israel and the Emergency Fund and the Federation, and so forth, and that you've come to ask him for "X". You give him the amount in the very first sentence. Then, you can start to tell him why, but as he listens to you, he listens to you knowing that you have a certain figure in mind. In the dialogue and negotiation which takes place between you and him, he is working against a figure which he has in mind; he is also forced to work against a figure which you've put on the table as your request. You will wind up with much more money by that method.
3. After you've given him the rating, outline the needs very carefully. Take your time. A speaker at a meeting has got 20 minutes--you will have 30 or 40. Explain very carefully why such large sums are needed. Take the message on needs which I have prepared. Use it, it's relevant to these current Jarring peace talks. Study your fact sheet; bring it with you; show it to him, if you have to. Take your time to explain the needs.

4. Solicit in pairs, if possible. And both of you talk. There's no sense in two men going in and one man keeping silent, which I've seen so many times. Support each other. Use different sets of arguments; with two voices working, two personalities working, you'll do a more effective job.
5. Don't settle for less than the rated amount. Just don't do it. Tell him you can't take it. You don't have to be mean or nasty--no, just be firm, be cool, tell him you came in after a certain amount and that you can't take less. If he says he's not prepared to give you the amount for which he's rated, say, "Thank you," and tell him that you'll come back to him.
6. Go back! Go back for as many successive visits as are required. Keep at your prospect. Keep at him until you've obtained the rating, or close to it. Your return visit is going to surprise him. When you don't close the first time, and you say you're going to come back, he doesn't think you will, he doesn't think you'll take the time and effort to do it. And when you do take the time and effort and you go back to him, you're going to surprise him. And you're going to get much closer to what you've asked for than you imagined possible in the first place.
7. Change teams of solicitors, if necessary. If you've gone back to a man two or three times and you haven't closed, you haven't settled, and he hasn't agreed to give the rated amount--and you feel that you've worn out your welcome--give the card to somebody else. Let another individual solicitor or another team go in and close with him.

8. Use lay leaders from the outside: If you've given the rated amount to the prospect, and you've opened the negotiation, and you've gone back three times, and you haven't been able to close it, it just might be that a man could come in from another community and close it. The United Jewish Appeal has been sending its lay leaders all over the country, to city after city, helping to close gifts.
9. Carry with you, and show to your prospect, a list of pledges made by others in the community--pledges for the rated amount. Use them as examples that there are people who are giving what they are being asked for, and are meeting their full responsibilities. It's important your man should know that he's not the only one, that this is a universal process going through the whole community.
10. The last point. Don't do any of the first nine on the telephone! Telephones don't work. If I said at the beginning that meetings don't work, certainly telephones don't work. This is an individual soliciting procedure, and it therefore must be done with the individual.

These are the ten points of what we feel is the successful technique of soliciting individual gifts. Please use them. Please work hard. Please handle your big gifts this way, above the level which you determine--perhaps \$500 or \$1,000--and I assure you you will come very close to reaching the goal which we are all seeking.