

VT-982 Transcription

Friedman, Herbert A. Worker training, "How to Solicit Gifts."

24 February 1971.

Herbert A. Friedman: [00:00] Very happy to have the opportunity to talk to you, the workers and leaders of the campaign, not about the needs of the campaign in this short message -- I've made another message, which is available in your federation office as to 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 and months of this campaign. The conclusion is that individual soliciting is a much better method of obtaining the very high increases we're seeking [01:00] than relying upon meetings, even card calling meetings, or even small parlor meetings, to achieve the same results. In other words, meetings are fine for some specific campaign purposes: to rate cards, or to distribute cards, or for education of workers, or mass rallies for stimulation of a 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 What I am saying is, that the old reliance upon a meeting to produce the results is no longer valid.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. And that was true for those campaigns when we were seeking 10 and 20 percent increases. But in a campaign where you're looking for 50 and 75 and 100 percent, or double, or triple, the meeting is not [02:00] the way to achieve the result. The speaker has only a short time at the meeting. He's harassed by a lot of outside considerations. He can't explain the matter in depth. What's required is individual soliciting, not meetings, in which personal interviews are obtained with every single large contributor, where you take the time and effort and energy to explain exactly why you will need two, three, and four times his previous years gift.

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 we're all looking so desperately for. After you have covered the big gifts, then you decide whether a meeting is worthwhile or not. You can have it or not.

I would like to tell you [03:00] the 10 simple rules that we've discovered -- it's not the Ten Commandments, but there are 10 rules of thumb which have emerged, which on a practical and

pragmatic basis represent the best, most efficient, and successful routine for achieving individual solicitations.

Number one: 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. On the pledge card, you put in large black letters the amount for which he has been rated. The rating has to be done by a committee of people whom the man will respect. He must recognize the names on it. That's why I say a valid committee. It's got to be people in the community who have the right to suggest what the prospect should give. You go in with a rating; you do not go in to [04:00] any solicitation simply asking for more money, or a lot of money, or we need a lot. Lot and more and all such terms are abstractions. They're not concrete. More means one thing to the solicitor; more means a different thing to the prospect. A number is not subject to misinterpretation. You want a specific, rated amount.

Point two: 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 a campaign in Israel and the emergency fund, and the federation, and so forth. And you've come to ask him for X, and you give him the amount in the very first sentence. So that, 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. And then in the discussion that takes place between you and him, the negotiating that takes place, he's working against a figure which he has in mind, [05:00] he also is 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.

Number three: 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, you will have 40. Take your time. Explain very carefully why such large sums are needed. Take the message which I made for the federation, use it. It's relevant to these current [Yarin?] 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.

Number four: 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. Spell each other, use different sets of arguments, two [06:00] voices working, two personalities working, in pairs, both men working.

Number five: 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, asked for a certain amount, 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 you'll come back to him.

Number six rule: Go back. Go back for as many successive as are required. Keep at your prospect. Keep at him until you 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 really believe 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 asked for [07:00] than you imagined possible in the first place.

Point seven: Change teams of solicitors if necessary. If you've gone back to him two, three times, and you haven't closed, and 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.

Number eight: Use lay leaders from the outside. A man coming in from another community, after you've opened -- you've given the rated amount to the prospect, you've opened the negotiation. You've gone back three times, you haven't been able to close it. It might be that a man can come in from the outside 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.

Point nine: Carry with you, and show to your prospect, a list of pledges made by others in [08:00] the community for the rated amount which they've been asked for, as examples that there are people who are meeting their full responsibilities. It's important that he should know that he's not the only one, that this is a universal process going through the whole community.

And point 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 10 points of what we call successful technique of soliciting individual gifts. Please use them. Please work hard. Please handle your whole big gifts this way, above every level you determine, \$500 or \$1,000, and I assure you, you will come very close to reaching the goal we are all seeking.

Thank you very much.

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