

GIANT, IMPORTANT DISCLAIMER: WE AREN'T GIVING LEGAL, TAX OR FINANCIAL ADVICE. PLEASE SEEK YOUR OWN COUNSEL FOR ANY DONATIONS. MANY OF THESE QUESTIONS ARE OPEN TO SOME INTERPRETATION, ARE GENERAL IN NATURE OR ARE UNIQUE TO A PARTICULAR JURISDICTION. ASSUME ALL ANSWERS ARE WRONG UNTIL YOU/YOUR DONOR CONFIRMS WITH HER/HIS ADVISOR.

**Q & A from “Smiling and Dialing: The Not-So-Lost Art of Building Deeper Donor (and Client!) Connections When You Can't Be Face-to-Face”
<June, 2025>**

What is the book title and authors?	https://www.amazon.com/Right-Side-Table-Where-Affluent/dp/0985116234 This is a key part of the CAP curriculum.
Why would you refrain from leaving a voicemail?	I will let Joe answer, but I think he said he will leave an initial VM but then if he calls back he won't keep leaving them each time.
Out of 10 calls before an email, how many voicemails (in addition to the first voicemail)?	Usually just one.
We use BeenVerified.	That is also a great service to find phone numbers. Very interested to see how the new AI tools will be used for this research as well... and how accurate they will be.
What types of questions do you ask to identify a donor as A, B, or C?	The exact questions are coming in 3-4 more slides.
Who handles follow up to Joe's calls - to me that is a huge challenge to increased volume...	Anne, so that I am clear, follow up when he doesn't hear back, or what I think you mean is following up on the qualified prospects/donors he is generating?

How do you manage an angry donor? Or if someone upset with the organization?

This happens obviously but the first rule is to simply listen so they feel heard, empathize, apologize if appropriate, use the Feel/Felt/Found technique and obviously try to find a solution if appropriate. It is also important to remember that donors are humans... so out of every 100, there are probably 3-5 that are just always going to be upset about something. Sometimes it is better to listen, be professional, but also know when to simply move on to other donors who love your organization (don't let the always squeaky wheel distract you from building other relationships.)