NONPROFIT TIP SHEET

Thompson & Associates' Best Practices

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Two of our experienced associates share best practices they've refined over the years in managing and facilitating our process, including nuances related specifically to virtual planning.

Mindset

- BELIEVE in the process - enthusiasm is contagious
- An invitation to participate in the Thompson planning process is a "GIFT" not an "Ask". It is a sought-after service, scarcely made available
- The Thompson process thrives when integrated as a resource for ALL donor relationships - rather than a one day a month program
- At every event, everywhere you go, ask yourself, "Who would be a good person to invite to the Thompson planning process?"
- Make it an enterprise effort, getting buy-in at all organization levels, having everyone think to invite others into the process

Activities

- Board members should go through the planning process. Consider it part of the new board member onboarding process
- Contact those who have indicated they have already provided for your organization in their estate plans. This is a way to say "Thank You" again
- Capture compelling testimonies from previous planning clients
- ALWAYS ask for feedback and referrals using the Evaluation Form!
- Invitations to the planning process are best when made personally
- Schedule an "Ask the Thompson Associate Hour"
- Schedule a monthly meeting with your associate to strategize on who's in the process and who/how to invite others

Events & Resources

- Consider offering a brief overview of Thompson & Associates' services at events & gatherings
- Establish a Planned Giving Committee, if you do not have one
- Introduce your Thompson associate to your Legacy Society, highlight the Thompson opportunity in their newsletter
- Plan (breakfasts, luncheons, coffee) meetings & have past planning clients invite 2 or 3 couples to hear about the process
- Use past planning clients to give a testimony regarding their experience
- Utilize our process video for a soft-invite at www.ceplan.com/gift (instructional resources can be found on our Client Center)

Virtual Meetings

- Send out reminder notices 3 - 4 days prior
- Call to remind the day prior to the meeting
- Maybe reconsider that "virtual background" (it can be distracting)
- Your background should be interesting but not too busy
- Check your lighting, try to eliminate shadows
- Sit close enough to the screen to be easily seen but not so close as to appear as a "giant head"
- The nonprofit client should be on the call for the first few minutes
- Connect with the planning client virtually before or after the meeting via Zoom or phone
- Schedule all meetings for the month on one set day
- Schedule a regular monthly meeting with your associate to strategize on who's coming into the process (even more crucial when virtual)

Genuinely Care

- People and relationships are the very lifeblood of your organization
- People and relationships are not resources to be tapped - they are relational beings who care about how they are related to and cared for
- If we lead with a genuine connection to people, then what follows is the outflow of relational connection and the strength of being united in a common purpose and goal
- Have regular connection points with prospects & donors that are "non-ask" connections
- The Thompson & Associates planning process is a relationship strengthening event between your donors and your organization

Watch Frank and Darren's 30-minute session covering this topic here.