



Phone Script | LAPSED DONORS

1. BEFORE THE CALL

- Pull your list to include: first gift and date, largest gift and date, last 3 gifts with dates, address, phone and email
- In database: Are there any notes in the record? i.e. spouse name, matching gift company, affiliation with your organization
- Practice this script with a partner

2. MAKE THE CALL

“Hello! My name is [insert name], and I am a [insert role] for [insert organization]. The reason I’m calling is about your past support of [insert organization].”

3. GET UPDATES

“Is now a good time to chat?”

IF NO

“When would be a good time?”

- Record time to call back. “Thank you!”

IF A CALL BACK IS NOT DESIRED

“May we continue to send you information on our work made possible by donors like you?”

- If answer is no, mark donor as inactive

“I hope you’ll consider re-joining this meaningful cause in the future. Thank you!”



IF YES

“Great! While I have you on the phone, may I check the address, email and phone we have on file for you?”

- update donor info

“I sincerely want to thank you for your past support, and I am hopeful that you will renew your support again this year by making a gift before December 31.” [WAIT FOR RESPONSE]

“Have you seen or received our letter and email about the chance to give this holiday season?”

IF YES

“Great! The people helped by [insert cause/organization name] really need your help. Will you consider being a donor again this year?”

IF NO

“Well, the people helped by [insert cause/organization name] need your help. Will you consider being a donor again this year?”

4. MAKE THE ASK**NO**

“To better understand our supporters, may I ask why you’ve decided not to make a gift today?”

- Record this anecdotal information

“Thanks for your consideration; and I appreciate your time today. Thank you!”

IF APPLICABLE

“May we continue to send you information on the work of our organization made possible by donors like you?”

- If answer is no, mark donor as inactive

“I hope you’ll consider re-joining this meaningful cause in the future. Thank you!”

YES

“That is great news! Are you willing to pledge [last year’s gift +20 today OR largest gift + \$20] today?”

IF YES AGAIN

“Fantastic! This gift will make a big difference in the [insert type of beneficiary]. I can actually accept your gift over the phone today with a credit card. Does that work for you?”

- If yes, accept credit card payment. “Thank you, and have a great day!”

IF NO TO +\$20 AMOUNT

“Will you consider matching your [last year’s gift OR largest gift]?”

- If yes, accept credit card payment. “Thank you, and have a great day!”

IF NO TO MATCHING LAST GIFT

“Is there a gift that you are comfortable pledging today?”

- If yes, offer the option/accept credit card payment. “Thank you, and have a great day!”
- If no- “Thanks for your consideration; and I appreciate your time. Have a great day!”

5. LEAVING A VOICEMAIL

“Hello! My name is [insert name], and I am a [insert role] for [insert organization]. The reason I’m calling is about your past support of [insert organization].”

I sincerely want to thank you for your past support, and I am hopeful that you will renew your support again this year by making a gift before December 31. We need you now more than ever. Are you willing to consider a gift today?”

You can make a secure gift on our website, [insert website address], today. I want to thank you in advance for your consideration of an additional gift, and if you have any questions or need additional information, please don’t hesitate to contact [insert contact name] at [insert phone number]. Thank you!”