



AFTER THE BALL: CONVERTING EVENT GUESTS INTO ANNUAL DONORS

Presented by Suzanne L. Seiter, CFRE
Schultz & Williams



Schultz & Williams
development, management, marketing

325 Chestnut Street, Suite 700
Philadelphia, PA 19106

215-625-9955 phone
215-625-2701 fax

www.schultzwilliams.com

WHY DO YOU DO SPECIAL EVENTS?

- Define your event goals: fundraising, marketing, friendraising.
- Define specific outcomes you expect to achieve.
- Develop a budget for the event and track revenue and expenses for your event. Always look at net revenue when assessing the value of the event to your organization.



BEFORE THE BALL

- Secure the names and contact information for all event guests.
- Dispense with tickets – send an upbeat confirmation letter to each guest telling them how glad you are they will attend the Ball and include date, time, attire, parking, and details on checking in as there will be no tickets.
- Enter all guests and contact information into data base.



BEFORE THE BALL

- Alert key board members and senior staff that you need their help as ambassadors to cultivate guests during the event.
- Review guest list and select key guests that you want to get to know better based on your prior knowledge of them – or simply past giving to your organization, zip code or business title.
- Do some quick research on these selected guests including giving history to your organization, Google search, and conversations with board members/senior staff.



BEFORE THE BALL

- Provide each board member and senior staff ambassador with a 3 x 5 card with 3-6 individuals you want them to meet and cultivate during the event as well as brief research on each individual. Note these assignments in your database.
- Provide each board member and senior staff ambassador with a brief script of the kinds of information you want them to gather: what the guest's role (beyond the title) is in their organization, what he or she knows about your organization, how he or she came to attend your event, other philanthropic interests.



BEFORE THE BALL

- Provide each board member and senior staff ambassador with 3 points you want them to convey about your organization, i.e. a new program you are launching, a poignant story of a client served; the needs of a capital campaign underway, etc.
- Be involved in preparing the seating chart for the Ball. Seat board members and senior staff ambassadors at or very near tables with the key guests you have identified for them to cultivate.



AT THE BALL

- Ask board members to serve as hosts who greet guests as they arrive at the Ball.
- Board member and senior staff ambassadors should seek out and engage in conversation with their key guests.
- A development officer should “float” – making certain board members and senior staff can find their assigned guests.



AFTER THE BALL

- Hold a next day (or Monday morning) post mortem to review the information you've gathered at the Ball. Board members can attend by via conference call.
- Ask each board member and senior staff to share one or two reports on guests they met – and to e-mail you information on the others
- Ask board members and senior staff members to pen personal notes (preferably on their own stationery) to all the guests they cultivated, inviting them to tour your organization with them.



AFTER THE BALL

- Based on the feedback in your post mortem meeting, prepare a prioritized list of event guests you want to cultivate further
- Have the president or development officer call people in priority order on the follow-up list, thanking them for attending, getting their feedback on the event, and inviting them to visit and get acquainted.
- Hold personal visits and get to know your event guests one-to-one, listening and learning about their professional and personal interests and how they match the mission of your organization. Invite the original ambassador to participate, whenever possible.



AFTER THE BALL

- Continue to invite the selected event guests to your most intimate events throughout the year, engaging them with the people you serve as well as your senior staff and board members.
- Include the selected event guests in your annual appeal, with a personally written note from their original ambassador if possible, or a note from you or your president acknowledging the relationship which began at the Ball.
- Add the selected event guests to the list of people you will call personally to follow up on your annual appeal.



AFTER THE BALL

- Thank the selected guests quickly and frequently if they contribute to your annual appeal.
- Always communicate with the selected event guests in a highly personal way, with good news and bad news. The board chair can call when a new CEO has been selected; the most senior development officer can call to inform of an exciting addition to the board or when the organization has won an award, or had a legislative or budget victory.
- Add a personal note to the invitation to next year's Ball to each selected guest, inviting them back and asking them to bring a guest, purchase a full table this year, etc.



AFTER THE BALL

- The goal is to make the event guest feel like part of “the family” of your organization, treasured as an intimate friend.
- Within one week after the Ball, send all other guests a personalized, computer-generated follow-up note of thanks for attending the event, including how the proceeds of the event will be used. Invite them to visit your organization, giving your name and number to call for a tour.
- Add all other event guests to your annual direct mail appeal.
- Record all actions and dates in your database.



THANK YOU.

Suzanne L. Seiter, CFRE
Senior Consultant
Schultz & Williams
Sarasota, FL

To download a copy of this presentation:
www.schultzwilliams.com and click on
“resources”



Schultz & Williams
development, management, marketing

325 Chestnut Street, Suite 700
Philadelphia, PA 19106

215-625-9955 phone
215-625-2701 fax

www.schultzwilliams.com



FOR MORE INFORMATION...



Schultz & Williams

development, management, marketing

325 Chestnut St., Suite 700
Philadelphia, PA 19106

215-625-9955 phone
215-625-2701 fax

www.schultzwilliams.com
mail@schultzwilliams.com

To contact the author of this
presentation:

Sue Seiter
Senior Consultant
Schultz & Williams
Sarasota office
Phone: 941-932-3536
sseiter@schultzwilliams.com

