



Conversation Tips During COVID-19

If your organization/congregation has been connecting with its members/families/donors during the time when people are sheltering in place, then you should feel comfortable reaching out to have new legacy conversations. If they have not, then we encourage you to reach out to your prospects just to check in before scheduling a time to discuss your legacy initiative.

Focus first on those individuals who have been particularly engaged since March, connecting for virtual services, webinars and other programs, volunteering and/or making cash contributions in response to crisis or other campaigns.

Check with legacy team members and others to make sure the individual you are planning to call isn't ill, caring for someone who is ill, recently experienced the passing of a family member/close friend or recently lost their job.

As usual go into the conversation with the mindset that you are giving individuals and families the opportunity to do something significant at a time when people are seeking a way to have an impact.

Reach out to the prospect on the phone to say hello, check in and ask if they would be willing to schedule a virtual meeting with you or another telephone call. Let them know that you are involved in an initiative that you believe they would want to be a part of. Be prepared to begin the legacy conversation over the phone if they decline a future meeting.

Depending on how well you know the prospect, your words might be more casual if you know the person well, or more professional if you do not.

Here is a guide to the conversation:

1. **Picture the prospect as a hero** so that you have an attitude of gratitude and your appreciation for their commitment to your organization comes through during the conversation.
2. **Recognize the world is different** – You might consider language like: “Despite the fact that we can't get together in person (or indoors), I really want to speak with you and thank you for your dedication to (organization) . You have been involved for so many years, would you share with me when you initially got involved and why?” (let the donor share their experience – remember you should listen more than you talk)

Respond as required, possibly with: “I can imagine you have seen many changes over the years. This is one of those significant periods of change we will all remember.”

3. **Mention how your organization has pivoted** – You might consider language like; “I know you have (or I hope you have) taken advantage of our online adult ed classes - we are getting double the attendance we usually have when we meet in person!” (or some other programmatic feature that you think they would be interested in) “What has your experience been?”
4. **Encourage the prospect to talk about how your organization has impacted them.** – You might consider language like: “Have you found these offerings have helped you feel connected/engaged during these

challenging times? “What does (organization) mean to you? How is your life better because of (organization)?”

5. **Talk about the future and ASK them to join you in leaving a legacy** – You might use language like; “The economic situation as a result of COVID-19 is really highlighting for us how critical it is for our organization to have a financial cushion. That is why we are working toward a secure financial future. Our LIFE & LEGACY initiative is one of the ways we are building our endowment which will help us get through volatile economic times like these. I chose to leave a legacy through an after-lifetime gift, would you join me in doing so?”
6. **LISTEN for their response** – remember silence is not the enemy – if you are on the phone and therefore can’t read body language – count to 20 slowly so you give the individual time to think and respond before filling the silence.
7. **If they ask for more information, explain** – You might consider language like: “Our Legacy society consists of individuals and families, like you who want (organization) to be financially secure in the future. We use a Letter of Intent which is your commitment that you will make a legacy gift. You can sign it now and take some time to consider what your gift will be – many people make a gift through an after-lifetime option in their will, trust, retirement account, or life insurance policy, that way it doesn’t cost a penny today. Would you consider joining us?”

Be prepared to respond:

- **IT’S ALREADY DONE or YES!** – Thank and congratulate. Review the Letter of Intent and ask them to sign. Encourage them to consider including other organizations. You can email the Letter of Intent. They can print it, sign it and mail or scan it (or take a photo) in order to email (or mail) it back to you.
- **I’LL THINK ABOUT IT** – WAIT! QUIET! This is your chance to LISTEN. The pause will give them the chance to share with you what their hesitation is.

Ask if there is any additional information you can provide them that would help them with the decision. Set up another time to meet with them, or for a follow-up phone conversation. Try not to end the conversation without a time to reconnect.

- **NO** – WAIT! QUIET! This is your chance to LISTEN. Ask if they will share their reason. Acknowledge and accept. Depending on the reason, ask if it would be ok to follow up with them in 6 months or next year.

No matter the outcome, always thank your donor

- Send a **handwritten note** after the meeting to again thank them for having a conversation with you.
- If they agreed to have you follow-up with them, make sure you remind them in the note.