

# Campaign Volunteer Strategies

## THE FIVE STEP CALL

### 1. Build your relationship with respect and trust

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Explain the purpose for your visit  
Find out what they know about United Way

### 2. Educate & inform

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Use brochure as talking point: programs funded, service area  
Explain why you support United Way  
Stress dollars raised stay local

### 3. Answer questions and concerns

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Listen to objections, ask questions to pinpoint concerns  
Address any concerns  
Turn an excuse into a positive reason for giving

### 4. Ask for Pledge

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For annual givers, say thank you for continued generosity, ask they maintain that gift—or if appropriate ask if an increase is possible  
Encourage new gifts—as little as \$1 a week will make a difference  
Review giving options—direct bill, payroll deduction, etc.  
Encourage a United Way presentation—can be as short as 5 minutes.  
**No company is too small!**

### 5. Say Thank You!

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Thank the contributor sincerely.  
Emphasize that their contribution will be used to help people in our community who need our help the most.

### Alternatives

Hold a special event:  
Packer Football Raffle,  
Hold a chili feed, etc.

*\*\* See Best Practices  
online for more ideas*

Attend United Way  
Restaurant Week

Offer information for  
services employees  
can use:  
2-1-1, FamilyWize,  
Backpack program

Volunteer

*\*\*Visit our Web site  
for board and  
committee  
openings, events  
and one-time  
opportunities*

Set Search Engines to  
GoodSearch for  
United Way

*\*\*Check out the  
Campaign Toolkit for  
more ideas*

## And, Don't Forget to Follow Up

- **BEFORE YOU LEAVE:**
- Update Number of Employees on Report Envelope.
- Schedule a follow up date to check progress.

Thank each business after their pledge has been recorded.

# Summary Check List

**My Campaign Schedule**

Company Name:  
 First Call: \_\_\_\_\_/\_\_\_\_\_/2010  
 Follow up date: \_\_\_\_\_/\_\_\_\_\_/2010  
 Projected End date: \_\_\_\_\_/\_\_\_\_\_/2010

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- \_\_\_\_\_ Select five packets
- \_\_\_\_\_ Review information about United Way Initiatives  
*Use manual, brochure and our Web site*
- \_\_\_\_\_ Schedule appointments and meet with your businesses
- \_\_\_\_\_ Visit with business leaders  
***Don't drop off a packet without talking to your contact***  
 Ask for a corporate contribution  
 Stress ease of workplace campaign  
 Update Report Envelope information
- \_\_\_\_\_ Make follow up calls to check on status  
*Let us know about your progress*
- \_\_\_\_\_ Return packet to United Way or locations listed on envelope  
*Every packet, even zero gifts must be returned and accounted for!*
- \_\_\_\_\_ Say Thank You (send a note, call, e-mail, etc.)  
*Everyone's time and gift is appreciated and a heartfelt Thank You is an important part of your efforts.*

**All packets must be returned to the office by December 31, 2010**



**Utilize United Way's Web site: [www.marshfielareaunitedway.org](http://www.marshfielareaunitedway.org) as a resource!**

At Campaign HQ you will find:  
 Talking points, program information, updated campaign progress  
 Event ideas, incentives, free memorabilia requests, activities  
 Posters, Toolkit, manuals, Thank you notes