

## Binghamton University Telefund Caller Evaluation Form



The caller evaluation form is designed to:

- a) show you how you are performing in relation to **average** caller statistics; and
- b) allow us to highlight your strengths and suggest areas for you to improve upon during the coming semester.

Please keep in mind that an average statistic is just that – a number for comparative purposes. As we always stress, telefund callers are not solely evaluated on how much money they raise. We use a combination of things like attendance, attitude & respect, ability to follow procedure, correct use and knowledge of SmartCall, rapport-building skills, and several other factors to determine if you are doing a good job as a Telefund Assistant.

Each caller will be provided with an evaluation form showing their statistics for *alumni calling* during the fall 2003 semester. Below is an explanation of what those statistics represent, along with tips to help you enhance your calls and improve those statistics.

**Attendance:** If you have received no strikes, your attendance is outstanding. While we do offer you the convenience of making strikes up, it is more beneficial if you can find a replacement instead of taking a strike on a particular night. Plus, having no strikes at the end of the semester will qualify you for the perfect attendance drawing. You can improve your attendance by utilizing Sub Slips and making better use of the alternate list.

**Average call time for pledge:** This is the average amount of time (in minutes) that you spend speaking to each person who makes a pledge or gift.

- If this figure is below average, it may mean that you are not making enough effort to build rapport or have a conversation with the prospect. Remember, part of what we want to accomplish at the telefund is to *reach out* to our alumni and reconnect them with the University. To improve rapport, ask more questions and have a *two-way* conversation.

**Average Gift:** This is the average dollar amount for each of your pledges/gifts.

- The key to increasing your average gift is to start out with a specific ask determined by donor history, then to negotiate. Remember, however, that negotiation will not be effective if you immediately drop your second ask to just \$5 or \$10. Try to find a second ask that is less than your initial ask, without dropping to rock-bottom. If they don't respond to your second ask but still seem interested in giving, ask:

***“Is there an amount that is more comfortable for you? A gift of any size can make a big difference at Binghamton. Your support is that important.”***

**Income per Decision (IPD):** A decision is a Yes, No, or Maybe (pledge/gift, refusal, unspecified). Your income per decision is the amount of money you are bringing in for each decision.

- If your IPD is low, you are either experiencing a high number of no's, or securing too many maybes. Too many no's may mean you are giving up too easily and not attempting to negotiate. Also, try to limit the number of unspecified pledges. Remember, a firm pledge results in a gift 80% of the time, while a maybe results in a gift

only 10% of the time. We never want to **force** someone to commit to an amount when they are not comfortable doing so. But the least you can do is *suggest* it.

***“A lot of alumni prefer to give through the mail rather than over the phone. If it makes you more comfortable, we can send you a pledge packet in an amount you specify, then if you decide to give more when the materials arrive, that would be great. Would you consider a pledge of \$\_\_\_\_ or other minimum amount?”***

**Pledge percentage:** This is the percentage of your successful/completed calls for which you secure pledges. The higher your pledge percentage, the more people are saying yes to your asks.

- If you have a low pledge percentage, you may be taking no's too easily and not responding to objections or negotiating effectively. The key to receiving a yes is making an effective case for support and finding a giving amount that is comfortable for the donor. While we never want to be pushy, a good negotiator is someone who is prepared to respond to someone's first 'No' and come back with a realistic second ask. These callers will be the most successful in securing pledges and gifts.

**Credit Card Percentage:** The percentage of gifts you are able to secure on credit card.

- If your credit card percentage is low, you may not be relaying the importance and convenience of paying by credit card to your donors. A recent study indicated that on average, it costs universities more to process a donation by check compared to one made by credit card.

***“Using credit card to pay your gift benefits both the University and YOU by saving time and processing and postage costs, and allows your donation to be put to use right away. Best of all, you can pay your gift off at a pace that is comfortable for you. Would you like to take advantage of our convenient credit card option this evening?”***

If all of your stats are above average, GREAT! You are doing a fabulous job and should keep up the good work! Challenge yourself to exceed your own past performance and evaluate what things you could improve upon.

- How are your speaking skills? Tone of voice? Enthusiasm?
- Do you have perfect attendance?
- Are you always asking about matching gifts?

If you ever have questions on your performance or would like advice on how to improve in a particular area, always feel free to approach Kim or a telefund manager. We are here to help!