Catering to Grateful Clients

AVAP: August 1, 2019

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Notes taken:

Approximately 42 people attended this session. Attendees broke into one of four groups to discuss various areas related to grateful clients:

1. **Talking with Clients**
   a. Focus on the pet, particularly if conversations begin in the hospital.
   b. Shy away from information overload during their time in the hospital.
   c. Work closely with faculty and staff- so that you can learn more about the family, case, etc.
   d. Private spaces for initial conversations is advised- but not related to giving "I'm part of the fundraising, communication, client relations team for the hospital".
   e. Prospects may be "tagged" in the data base- maybe a VIP call (Melissa).
   f. Some issues with clinicians may arise as clinicians can be wary of development "alerts" so a VIP notation may be a turn off.
   g. Dedicated concierge line? Handful of donors that can call to request an appointment more quickly.
   h. Handwritten notes even without meeting directly with clients
   i. May depend upon the service- a spectrum of availability in terms of faculty connections with development.
   j. Block change free food Friday- coffee and Chick Filet with development
   k. Sharing individual emails and strategies with faculty to set the right tone.
   l. How do you introduce giving in a conversation? "Part of my role is to facilitate support for the hospital, are you interested in investing in the future of the program?"

m. Transparency is important-

n. Always better to get a lead from faculty

o. Partner with faculty on an initial email to a prospect.

p. Be careful when you tour donors/prospects and who you give them access to.

2. **Marketing and messaging to clients**

   a. Find ways to tell stories

   b. Include "did you know that many of our programs are funded and excel because of donors?"

   c. Have a robust website that is easy for clients to peruse.

3. **Wealth screening**

   a. Screen regularly whether it is monthly or quarterly

   b. If you cannot screen all clients, consider a limited number of high performing services that are likely to yield better results.

   c. Exclude DOA animals, clients with balances or clients that hospital recommends excluding.

   d. Privacy- we are not selling information. Provide an opt out option in surveys or communications.

   e. Have a strategy for managing wealth screened prospects that come back rated. Prioritize how the top prospects are assigned to gift officers.

   f. Manage relationships with clinicians and engage them in developing strategies for top screened prospects they are involved with.

4. **Engaging faculty, staff and others on the team**

   a. Share kind words about faculty with them

   b. Ask faculty for referrals

   c. Education or workshops with faculty and staff to understand what development does, how they can help and play a role in securing gifts for the hospital.

   d. Consider videos for onboarding new members including residents and students.

   e. Announce gifts via meetings, publications, etc. so faculty know results of collaborating with development.

   f. Recognize faculty and staff that work with development- pins, stories, special occasions.

g. Client screening and strategies, donor visits, tours

5. **Key Points:**
   a. Important to maintain an integrated fundraising and communications program.
   b. Decisions should be based on data
   c. Remember that a good patient-family experience is integral to the grateful client (regardless of the outcome)
   d. Need faculty/staff engagement
   e. Hospital leadership support is essential

MODERATOR ADDED THIS INTO THE NOTES BASED ON QUESTIONS RECEIVED IN ADVANCE FROM ATTENDEES

Grateful client interactions- what's been successful?

Research in human hospitals have shown that hospital executives, physicians and board members have the greatest influence on major gifts.

- As a client
  - Coded in system as "Friend of the School" which sends alerts of upcoming visits and appointments
  - Concierge service (pre-admission support, amenities)
  - Sit with them while they are here
  - Accompany them during the visit
  - Confidentiality
  - Honor the human animal bond
  - Specific assignment to a DO
- Continuing education programs for the public
  - Classes and workshops
  - Meet the vet (vino with the vet)
- Events
  - UC Davis holds an annual spring showcase for donors over $1000 and estate donors to learn more about the school

- o Private tours/group tours
- o Salon events in private homes or groups
- o Special animal holidays such as
  - National Wildlife Day,
  - National Horse Protection Day,
  - Animal Cruelty / Human Violence Awareness Week,
  - Bird Day,
  - National Hug your Cat Day,
  - National Farriers Day,
  - National Farm Animals Awareness Week,
  - World Animal Month,
  - National Animal Shelter and Rescue Appreciation Week, National Day of the Horse,
  - World Veterinary Day,
- Lectures or open house events
- Memorial program to remember people or pets OR to honor outstanding service or occasions
- Volunteer groups (leadership groups if they are at that level of engagement)
- Newsletters, email stories, social media, etc.
- Customized
  - o Assignment to a DO
  - o Personalized notes and touch points
  - o Personal visits
  - o Meeting with veterinarian
  - o Meeting with Dean
  - o Meeting with Chancellor/President/leadership

Talking points during personal meetings

- Share their story- client experience
- What touched them most?
- Would they consider helping?
- If so, how?
- Get to know them and what's important to them

How is meeting with grateful clients different from meeting with alumni?

- No different in that the goal is to build a relationship.
- Sometimes alumni have not had the client experience
- Typically clients will honor a specific doctor, service, staff or their pet. Alumni may recognize a faculty.

Has catering to clients gone too far?

- When has it gone too far? When client EXPECTS special care and handling
- Who determines how clients are handled?
- Faculty protecting clients from development interaction?