Best Follow Up Practices

Do you ever feel awkward about following up with someone about a financial ask?  Some of us feel stuck when it's time to follow up on financial gifts with our recent alumni.  And we throw all of our good MPD practices out of the window.  In the process, we risk losing our best ministry partners - those who know and love us and have been transformed through InterVarsity's ministry.  Those alumni often become our best advocates!

Note: *If you didn't ask an alum to partner with the ministry before they left campus, you need to reach out to them as soon as possible.  Every month after graduation equals more distance from their InterVarsity experience and community.  Prioritize these alumni as top potential partners!  Reach out for a virtual or in-person appointment.*

Best Tips for Alumni Follow Up

You need a system

Whether it’s [Karani](http://www.karani.co/) or something else, you need a system to track your alumni and identify the next step with each of them.  You need to track whom you have contacted so that you can discern when to follow up, based on their individual timelines.  You want to make sure no one falls through the cracks.

Follow up with persistence until closure

By "persistence," I mean at least once a month, ideally even more often unless they give you a specific timeframe to follow up with them, such as, “My job starts in January, call me again then."  You’ve reached "closure," when you get a gift (preferably monthly) or hear a clear “No” response, meaning, "I don’t want to give, ever" (this is rare). Most of the time, alumni will either sign up to give or express interest but do not start giving until they have their finances in order.  It is important that you continue contacting them until this happens.  The longer you let the ask linger, the more awkward it will be.  Frequent and consistent follow up actually creates a more professional relationship and therefore eliminates awkward conversations when it comes to MPD and alumni.

Your challenge is to continue reaching out, despite a lack of response from alumni.  You will have to power through this!  For some alumni, you might need to leave 10 or more voicemails and/or texts and emails. If your alum is an indirect communicator, make sure your follow up method is appropriately clear in a manner that fits their context. For example, perhaps you will check in about something else to remind them about giving. Perhaps you will send a mass email to a group of alumni instead of a direct phone call. Consider what communication fits your alum, more than what makes you comfortable.

Do it Mullet syle!

Have you ever heard that a mullet is “business in the front and party in the back”? Your follow up will be smoother, faster, and less awkward if you use the mullet style of follow up as your guide – remember business in the front and party in the back!

Open the phone call, text, or email with the real meaning behind your contact, their giving. Start with the question of their gift. Once that is done, you can ask about their life, their church, their significant other, etc. Or, if you are in a series of follow up calls, do the follow up business and then ask for a separate time to do a more comprehensive connection.

Assume the best

Remember that their lack of response does not indicate a lack of interest in InterVarsity or any negative feelings about you.  New alumni are often overwhelmed by the transition to the work world, unprepared for the lack of free time, and struggling to manage adult tasks.  They may not even know how to set up a budget or make decisions about giving.  This is where you can disciple them in key moments, for the sake of their spiritual, emotional and financial health.  Remember that they love InterVarsity and want to invest in the future of the ministry at their alma mater. You are their link to the community that helped them grow and you are a positive reminder of God’s grace in their lives.

Relax!

You don’t have to be overly formal or worry too much about what you are going to say.  Most of the time a simple “Hey, I just wanted to follow up on your giving to InterVarsity,” will suffice. And if you already emailed or texted them, a simple “Hey, just wanted to circle back about my previous email/text” does the trick. Be yourself and be casual.

Use their favorite communication style

How did you contact them when they were students?  That’s how you should follow up.  Text and email is perfectly acceptable, especially if they were your students.  If you are contacting an alum you haven't met before, you may want to use the phone to establish more of a connection verbally.

Throw Me under the bus

Whenever I coach someone I tell them they can always throw me under the bus when it comes to follow up. This can save face with the prospect and takes some pressure off everyone. You can say, “Hey, my coach is asking me to follow up with all the alumni.” Or “My coach really wants me to close the loop with everyone who graduated last year”. Most supervisors are also are fine with being thrown under the bus if you need to explain why you are contacting alumni frequently.

Follow up can feel like an uphill battle, especially when your alumni seem unreachable, but it is one of the most crucial MPD activities to help your alumni become partners.  Without follow up, our invitations to give, advocate, pray and serve fail to lead to actual partnership. When you do it faithfully, it will yield great results both now and in the future!