



TRAINING MANUAL

INSPIRING FUNDRAISING SOLUTIONS

JULY 31, 2021

AGENDA

10:00 AM	TRAINING
NOON	LUNCH
1:00 PM	TRAINING
4:00 PM	PHOTOS FOR WEBSITE
	BREAK
6:00 PM	DINNER

INTRODUCTION

Background:

We are in the business of providing an easy and effective fundraising opportunity for any school or non-profit organization by selling local quality fresh holiday evergreens and spring flower baskets.

Our company has over nine years in the fundraising industry. We provide exceptional pricing, creative products, and high profits as well as incredible personalized service by getting to know our clients needs and desires. It is our commitment to becoming a true partner helping our clients reach their fundraising goals.

Our approach provides clients with a personalized comprehensive webpage, short selling period, marketing ideas and tactics for a smooth distribution process to their clients that are cost effective, creative, and responsive.

Objectives:

- Listen to your clients' needs and wants
- Provide service and product offerings
- Explain custom web page and key dates
- Develop a personal relationship

Team Members:

- | | | |
|------------------|--------------|--|
| ▪ Lynn Haller | 425-785-9405 | Christian Schools |
| ▪ Mahea Oleole | 253-389-7281 | Public Schools, Non-profit organizations |
| ▪ Matthew Haller | 425-614-8876 | Sporting Organizations |
| ▪ Mike Cairns | 425-213-9402 | Military |
| ▪ Roux Ann Koon | 253-999-3746 | Rainier, Tenino, Eatonville, Yelm, Roy, Morton, Randall,
Olympia, Tacoma, Lacey |
| ▪ Steve Allen | 425-247-5076 | Churches, Youth Groups |
| ▪ Randy Haller | 425-269-1363 | Financial |

Target Accounts:

- Christian Schools
- Sporting Organizations
- Non-profit organizations
- Public Schools
 - Athletic Departments
 - Music Departments – Band, Choir
 - DECA
 - PTA

STEP BY STEP ON HOW TO SELL

Quick History of Selling

- What is Professional Selling
 - Highly trained people
 - Teach knowledge of product
 - Understand Customer
 - Understand Customers Organization
 - Reading your customer – body language or tone of voice
 - Product Knowledge
 - Maximize your time with clients

- Dale Carnegie – *How to Win Friends & Influence People*
 - *The Greatest Salesman in the World* – Og Mandino

- Background

- PSS 1-4, The Art of Selling, The Art of Effective Listening

Personal Organization & Goal Setting

- Setting up your Office
 - Everyone is an Independent Distributor and will receive a 1099
 - Tracking spreadsheet – emailed this to you
 - Follow up with clients very important – 3-5 days
 - Keep in front of your customers – emails, notes, calls etc.
- Establishing Sales Goals
 - Set weekly goals for yourself, how many calls will you make
 - 5 new clients this fall
- 1000 people x average items sold 5 per person x \$3.20 profit = \$16,000

Professional Sales Statement

- If I can show my client how **my product meets their needs**, they will buy **my product**.

I establish their **needs by probing to understand their needs, and then I link the benefits of my product to their needs.**

- Ask probing questions to find out what their needs are
 - How many kids do you have in your organization
-

THE PRODUCTS

The Product

- Open Detailed Discussion
- Flyer
- Top Sellers
- Limited items to sell

- | <u>Features</u> | <u>Benefits</u> |
|---|--|
| • High quality products at fair prices | Locally sourced items |
| • Significant profit for each item sold | Less items to sell to raise more money |
| • Easy to manage | Custom web page, own domain name |
| • Not labor-intensive | Easy distribution, contact less |
| • Fundraising made simple with web base tools | Online tracking & collecting money |
| • Buying items already | Support own group |
| • Delivery day | Fun and exciting |
| • Money is collected up front | No upfront costs to organization |
- Fit these into your presentation

First Steps

- What you must do prior to making appointments
 - Know your products:
 - Items, size, case quantity, price, selling periods, samples, delivery dates
 - Features and benefits
 - List of clients – call 10 people, small groups, ok if they say no
 - Next 10 groups – med size groups
 - Next 10 groups - larger
- Initial Benefit Statements – IBS
 - When thinking about what a benefit statement is, keep in mind the client's point of view: "*What's in it for me?*"
 - The formula for powerful benefit statements:
 - Action + Need/Problem + Result = Benefit Statement
 - Problem, feature, benefit, result
 - **If there was a way that I could help you with a fundraiser that is easy to manage within a short period of time, simple with web-based tools, local high-quality products, and provides significant profits for each item sold, in what way do you think this would interest you and your families?**

FALL PRODUCT OVERVIEW

FALL FUNDRAISING

Products, Pricing, Case Quantities:

Centerpieces

Item #	Description	Case Quantity	Case Price	Each Price	Sale Price
D166	Lantern LED	8	\$143.48	\$17.94	\$38.00
D167	Birdhouse	8	\$109.47	\$13.68	\$30.00
D168	Birch Log	6	\$117.04	\$19.51	\$38.00
D169	Wood Sled	10	\$168.01	\$16.86	\$34.00
D184	Cup of Cheer	6	\$ 92.56	\$15.43	\$32.00

Greens

Item #	Description	Case Quantity	Case Price	Each Price	Sale Price
G25PC	Mixed Garland	3	\$54.07	\$18.03	\$36.00 – 25'
ZW24005	Country Wreath	10	\$180.99	\$18.01	\$36.00 – 24"
ZW24013	Vintage Lantern Wreath	10	\$200.40	\$20.04	\$36.00 – 24"

Metals

Item #	Description	Case Quantity		Each Price	Sale Price
	Snowflake	0		\$20.00	\$36.00
	Merry Christmas	0		\$20.00	\$36.00
	Tree	0		\$20.00	\$36.00

Case Quantities:

- Everything must be sold in case quantities
- Metal signs have no case quantities

Pricing:

- \$16.00 profit per item sold
- \$ 8.00 profit to organization
- \$ 8.00 profit to company 40%/60%
 - Seller (40%, \$3.20)
 - M & L Fundraising (60%, \$4.80)



SPRING PRODUCT OVERVIEW

SPRING FUNDRAISING

Products, Pricing, Quantities:

Flowers

Item #	Description	Each Price	Sale Price
	12 inch Hanging Basket	\$	\$35.00
	Premium Mixed Flat of 10 plants	\$	\$40.00
	14 inch Hanging City Basket	\$	\$50.00

Metal

Item #	Description	Each Price	Sale Price
		\$20.00	\$36.00
		\$20.00	\$36.00
		\$20.00	\$36.00

HANDLING OBJECTIONS

Objections:

- Not interested
- I already have my fundraising set
- Can't get helpers/volunteers
- Blah blah blah

- Eliminate Objections in the Sales Presentation
 - Write down objections and get a list of clients needs
 - May I ask you a few questions?
 - What companies have you used?
 - Active Listening Practicing.
 - Repeating Back What Was Heard.
 - Defining And Understanding Your Prospect's Real Concerns.
 - Asking Follow-Up Questions.
 - Explain the Value and Give Proof.
 - Use the formula # kids x avg 5 sold x \$8.00 each = total
 - Follow up email
 - In the future...if you're interested. Thank you for talking with me
 - If the company, you are using provides the profits you need that great. I'll touch base with you next year.

THE SALES PROCESS FOR M & L FUNDRAISING PRODUCTS

Sales Process for M & L Fundraising Products

- Targeting and Making the Appointment
 - 10 – 10 – 10 clients
- Introductions and Casual Conversation
 - Be observant, look around office, comment on non-business items, interests, find out what's important to them, family, pictures, trophies
 - Compliment them
 - Natural personal introduction:
 - Lynn Haller with M & L Fundraising, thank you for taking my call.
- Nervousness and vomiting information all over your client
 - Fear leads to being nervous and you don't stop talking
 - They don't know your product!
 - **Confidence through product knowledge**
- Now let's walk through a presentation
- At the end Q & A
- Asking for the Order
 - Simple agreement online to complete
- Follow up and Next Steps
 - That night send a follow up thank you email and or written note
 - Weekly communications with clients

Probing to ask questions

Linking benefits to their needs

Review their website first

I noticed on your website you have xyz....

If they say yes – STOP explaining – go to details

If they haven't said yes – when you have given them enough information

What is it you need from me to help you understand for you to move forward with this program?

Be creative!

Limit product offers per group – easier to obtain case quantities.

Do you know anyone else that could use our fundraising program?

WEBSITE – CUSTOM ORGANIZATION PAGES



<https://www.mlfundraising.com/>

Website – become very familiar with our site

How it works – 1, 2, 3

Products Offered - two fundraisers – Fall/Winter and Spring/Summer

Holiday Evergreens

Spring Hanging Baskets

Sign up Now!

About Organization – pictures and text describing the organization

Each participant shares personalized website link with supporters with secure check out site

Donate \$5.00 to help cover credit card processing fees 2.5%

Reports –weekly, case quantities

About M & L Fundraising

Learn the history

Our Team

Know your team and resources

Email – your first name followed by mlfundraising.com

FAQ

Email Lynn questions that are asked from clients that may not be listed on the website

AGREEMENT FOR PARTICIPATING ORGANIZATIONS

- Organization agrees to make our best effort to promote and manage the fundraising efforts within and to communicate with M & L Fundraising throughout the process.
 - M & L Fundraising will make every effort to help the Organization have a successful fundraiser by providing a custom website with a personalized domain name including all online forms and materials necessary, guidance pertaining to key dates, recommendations regarding management of the fundraiser, communication tools to help Organization present products to their network and recommendations on effective distribution of orders.
 - M & L Fundraising will work with the Organization to set up their personalized domain name, custom website and payment processing with their finance department. This page will include the Organization's logo, pictures, description of what the funds are supporting and visual goal thermometer. A processing fee will be included on each transaction to help Organization cover the cost of transactions.
 - M & L Fundraising will provide up to two product samples as necessary and requested. Additional samples may be obtained at an additional cost.
 - The organization will make a profit of \$8 per item sold.
 - Complete details regarding the above items will be discussed with the Organizations leader(s) in a future meeting in person or via Zoom.
 - There are no up-front costs to the Organization.
 - At the conclusion of the fundraiser, \$100 will be deducted from the total sales to cover administrative startup costs, domain and hosting fees.
 - Payment will be made to M & L Fundraising by Monday, November 22, 2021.
 - Should the Organization decide not to participate after signing this agreement and the print work, domain, hosting and website has been purchased and constructed, they will be charged for the personalized printed materials and the \$100 admin costs.
-

MARKETING IDEAS FOR ORGANIZATIONS

COVID-19 has made the fundraising world more challenging than ever. The pandemic brought new challenges to overcome. Supporters adopted new behaviors that make online presence that much more valuable — and effective for raising money. It will be a while before the world returns to large, in-person events that once served as fundraisers. In 2021, the best nonprofit fundraising ideas will take place online.

1. Use your organizations website

- Link your fundraising web page to your organization's website.
- Merchandise will be able to announce a new online fundraiser, generate awareness, reinforce customer relationships.

2. Up your social media game

Make sure you have an active social media presence. Community members want to see what you are doing, and social media provides powerful ways to connect and share. Make regular posts, pictures, updates, event announcements and tagging supporters. Facebook, Instagram, YouTube, Twitter, or another popular platform.

3. Lights, camera, action!

- It is time to take the next step with new virtual fundraising events with digital marketing, be creative and use videos, highlight the product, reason for fundraising. Videos are an effective way to grab attention and build excitement with your audience.
- Consistent email communication to your audience on a regular basis will also get their attention. Three short weeks of selling.
- We understand the value in developing just the right fundraising strategy to blend with and extend your organizations marketing and fundraising efforts.
- We will work with you to develop the best combination of options to suit the organizations needs and complement your overall brand.

4. Make and meet your goals

- You cannot reach your goals if you do not have any.
- Make your goals specific, clear, tangible, and measurable. With measurable goals, you'll know if you're on track to reach your targets and be able to share with donors what that extra funding will do for your organization.

5. Visuals

- Make posters for common area posters
- Display samples
- Hold assemblies – M & L Fundraising to come and speak
- Make it FUN!
- Give out prizes – top seller

Think ahead and be prepared for your most successful year of fundraising and community building for your group.

POINTS OF DISCUSSION WITH CLIENTS

Involvement

Sellers working towards goals, by class, individual etc.
Learning process
Weekly check in status

Key Dates

Selling starts Monday, October 18 – Monday, November 8, 2021

All orders completed by Monday, November 8, 2021

Delivery Date: Friday, December 3, Saturday, December 4, 2021 or Sunday, December 5th

Olympia/Tacoma area some deliveries could be made on Friday, December 2

Payment due to M & L Fundraising by Monday, November 22, 2021

Ownership of the fundraising

Discuss who is responsible for decision making
Budget responsibility
Payment – make sure your accounting department is aware of deadlines

DISTRIBUTION PROCESS

Continental Floral Greens formally Hiawatha

- Truck(s) loaded on the first Friday of December – Friday, December 3, 2021
- Based upon the client locations, this determines the route for delivery and truck loading
 - first loaded on the truck, last off
 - last off, first delivery
- Loading verification is done onsite as they are loading the truck
 - Tag wreaths and garlands with organization name – colored zip ties
 - Centerpieces verified by case counts

Truck Rental

- Depending on the client locations and orders, depends on how many trucks we rent
 - South end
 - North end
- Box truck must have a lift gate to load at Continental Floral Greens

Delivery schedule

- Typically, deliveries are made the first Saturday in December – Saturday, December 4, 2021
- Organization's delivery times are based upon how many stops each truck has and travel time
 - Contact will be made with each organization as the truck is on the way with estimated delivery time
 - Make sure we have cell phone numbers for contacts

Delivery Verification

- One to two people unload truck
- Verification count as items come off the truck
- Unload and line up product in order
 - Verify review with client
 - Sign off

Supplies needed

Gloves
Box knives
Clipboards
Pens (Red & blue), sharpies, highlighters
Snacks & water
Waterproof pants

TIME FRAMES

Fall Fundraising – Four Months

September get clients enrolled, October sell, November sell, December delivery

- Initial meeting between M & L Fundraising and organization
- Discussions to determine overall goals of fundraising
- Review of the products offered – choice of how many products to sell
- Review organization custom webpage, content details, pictures, deadlines, and accounting bank account link
- Determination of what items will be offered
- Marketing strategy, online web site
- Review, discussion, and finalization of terms and conditions
- Review of cost
- Selling timeframe
- Reports weekly
- Delivery date and estimated time

Spring Fundraising – Four Months

January get clients enrolled, February sell, March sell, April delivery

- Initial meeting between M & L Fundraising and organization
- Discussions to determine overall goals of fundraising
- Review of the products offered– choice of how many products to sell
- Review organization custom webpage, content details, pictures, deadlines, and accounting bank account link
- Determination of what items will be offered
- Marketing strategy, online web site
- Review, discussion, and finalization of terms and conditions
- Review of cost
- Selling timeframe
- Reports weekly
- Delivery date and estimated time

Rest of the months – Four Months

May, June, July, August

- Use this time for confirming clients for next fundraiser cycle
 - Establish new accounts
 - Set a personal goal for adding at least one to two new client each month
 - Get clients enrolled online
 - Start custom web page
-

M & L FUNDRAISING BRANDING

Email Auto Signature - consistent

Lynn Haller

425-785-9405

www.mlfundraising.com



Providing an easy and effective fundraising opportunity for any school or nonprofit organization by selling local quality fresh holiday evergreens and spring flower baskets.

Mailing Address – 16181 NE 29th Street, Bellevue WA 98008

Business Cards – let me know if you need more

Logo merchandise – future items

M & L FUNDRAISING SAMPLE SCRIPTS

Phone script

- initial call
- less is more
- get the meeting date

Email initial contact

- initial call
- less is more
- follow up with phone call
- get the meeting date

Email follow up after initial contact

Sample Social Media Post