

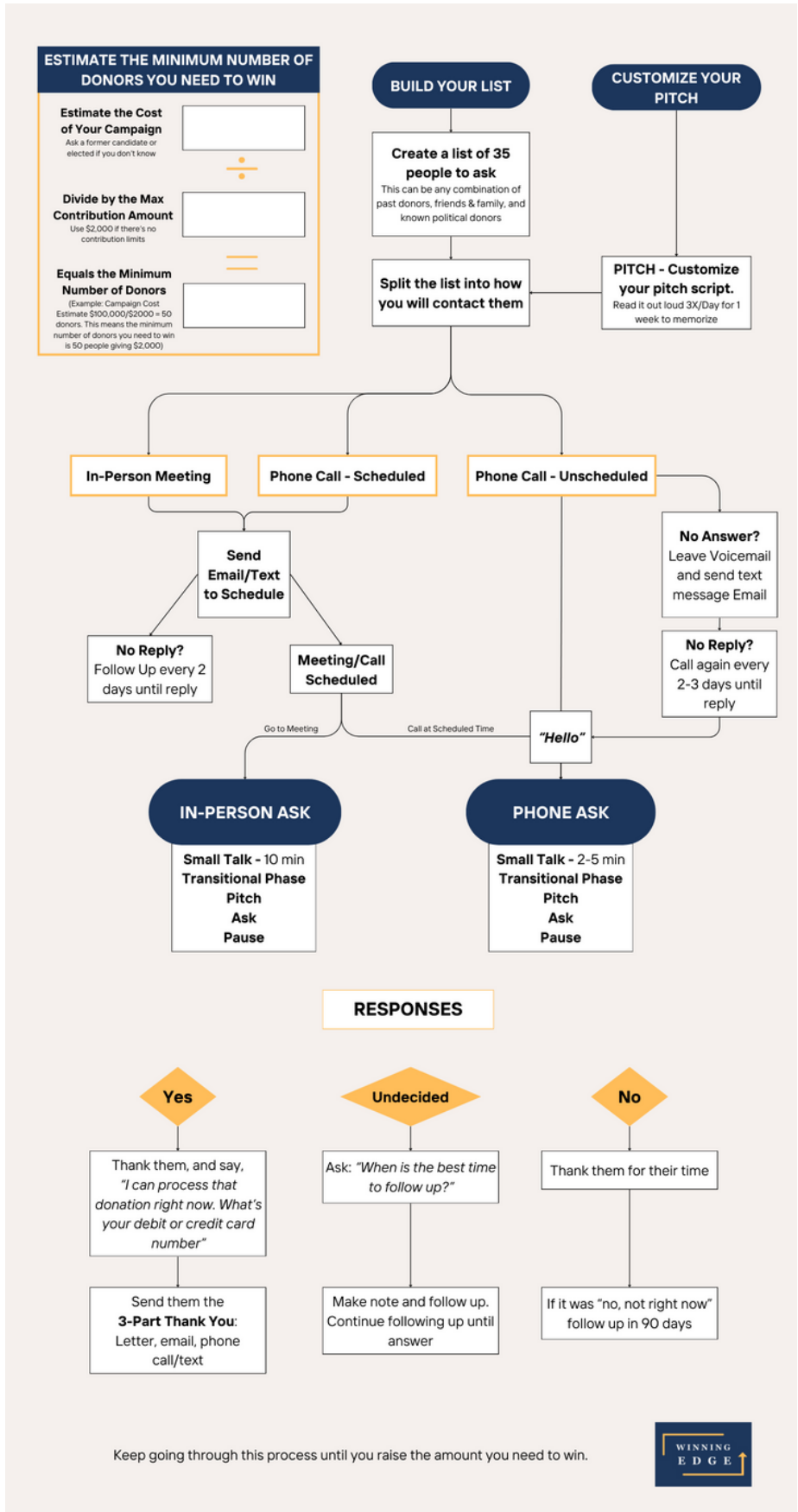
The Fundraising Flowchart

In the early 1900s, Frank Gilbreth was managing a construction crew, but he was fascinated by the idea of finding “the one best way” of doing things. Through observing his workers and testing different methods, he developed a system that tripled the bricklayers' productivity.

Frank and his wife Lillian, a psychologist, continued to study workers' motions. They pioneered the use of movie cameras to film and analyze how the most efficient people worked. They even studied surgeons in operating rooms, mapping out each step of their process.

These motion studies led to creating the first flow charts to standardize complex procedures and revolutionize efficiency in many industries.

Building on [Winning Edge #18, The 4 Steps to Start Your Fundraising](#), we've created a simple flowchart to help you achieve the most efficient fundraising possible. This one-page view will guide you through the process step by step.



Source: Baumgart, A., & Neuhauser, D. (2009). *Frank and Lillian Gilbreth: scientific management in the operating room*. Quality and Safety in Health Care, 18(5), 413-415.

Fundraising Flow Chart Walkthrough

- **Estimate the minimum number of donors needed to win:** Divide your campaign's estimated cost by \$2,000 (or the contribution limit). This gives you the minimum number of donors required. For example, if your campaign is estimated to cost around \$100,000, you want to divide that by \$2,000, which equals 50
- **Build a list of 35 potential donors to ask:** Include past donors, friends and family, and known political donors.
- **Split the list based on your preferred contact method:** Decide whether an in-person meeting, scheduled phone call, or unscheduled call is best for each potential donor.
- **Customize your fundraising pitch:** Create a simple, 1.5 to 2-minute pitch explaining why you're running. Practice reading it aloud three times a day for a week to internalize and memorize the content.
- **Schedule meetings or calls:** Send a text or email to schedule, such as:
 - *"Hi, [Donor Name]. It's [Your Name]. I hope you're well. I'd like to talk with you about the campaign and our efforts to win back the statehouse. Do you have ten minutes for a call on Friday afternoon?"*
 - Follow up every two days until you receive a reply.
- When you make the fundraising call: Engage in 2-5 minutes of small talk, then use a transitional phrase:
 - *"I really appreciate you talking with me. I'd like to take the next two minutes to tell you about our campaign and my plans to win in November."*

- **Deliver your pitch,** make the ask, and pause, don't speak and wait for the donor's response.

◦ **If the donor says YES:** Thank them and process the donation immediately.

- *"I can process that donation right now. What's your debit or credit card number?"*
- Send multiple thank you notes (letter, email, and text) over several days.

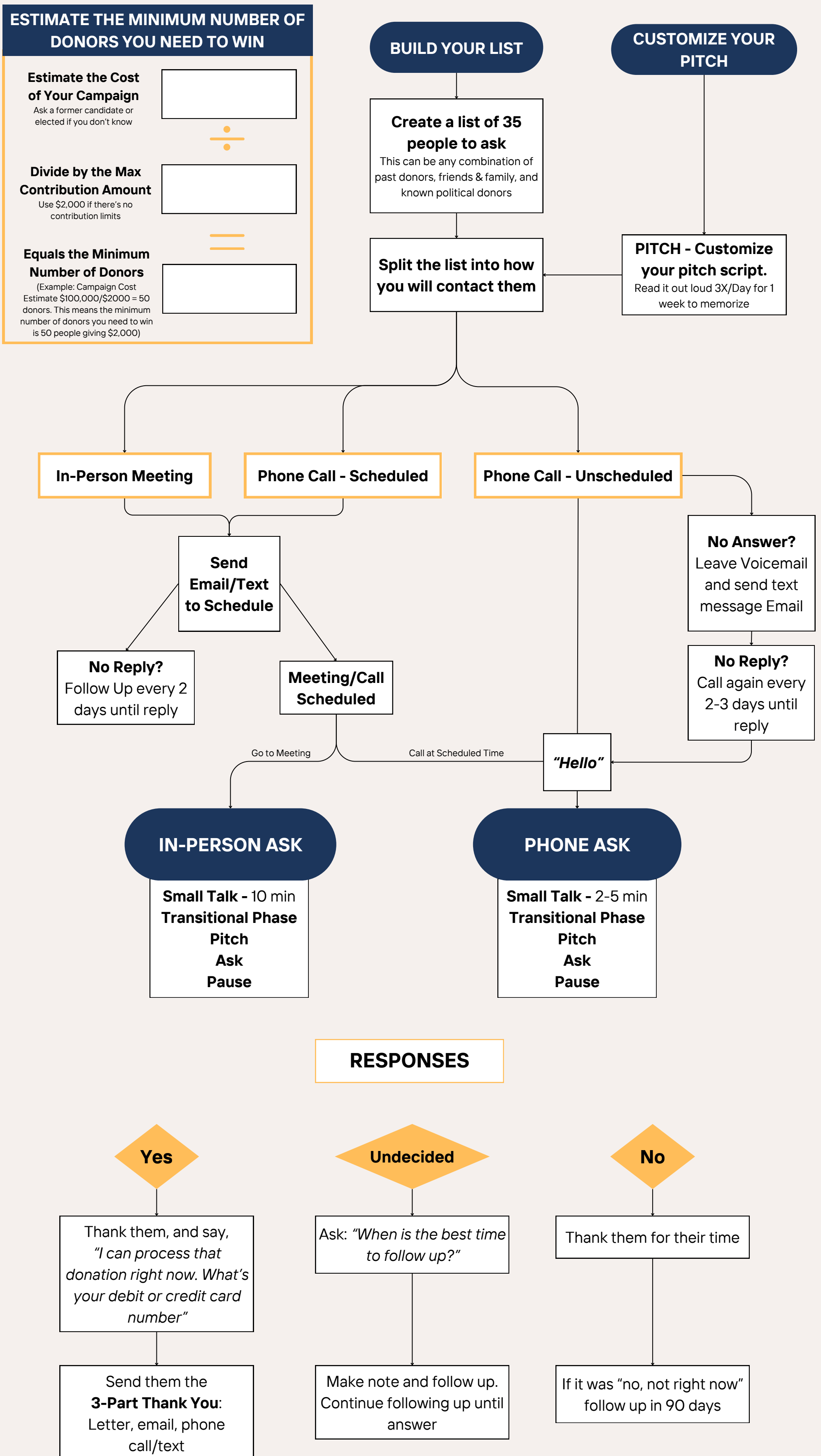
◦ **If the donor is UNDECIDED:** Ask: *"When is the best time to follow up?"* make a note, and follow up until you get an answer.

◦ **If the donor says NO:** Thank them for their time. If it's a *"no, not right now,"* consider following up in 90 days.

The Bottom Line

By following this campaign fundraising flowchart, you'll find the best way to raise money for your campaign. Just like Frank and Lillian Gilbreth, you can use this guide to discover the most effective approach for you and your unique situation.

CAMPAIGN FUNDRAISING FLOWCHART



Keep going through this process until you raise the amount you need to win.

