

Tips to be an Intentional Gift Officer: #3

Partner and Develop Strong Relationships with a focused group of key Physician Allies:

- **Focus on a Few Aligned Physician Allies--not many.** An early lesson I learned in hospital philanthropy is that the wealthy gravitate to a handful of top physicians when they or family need care. Review the data of which attending physicians have the wealthiest patients and are either leading or advocating for programs that the hospital has approved as fundraising priorities. Focusing on a few gives you time to develop the alignment with the top physician allies so they will trust and work with you more. Remember the patient is grateful to the physician--not the institution.
- **Spend focused time with the key Physician Allies reviewing how you will partner together to raise funds for the priorities that matter to them and the hospital.** Keep a running agenda with prospect names and prospective gifts in the pipeline and agree on next steps and assignments. Keep the meetings focused and end early.
- **Only reach out to a patient prospect after checking in with Physician Allies to be sure the timing is right. Say, “Please don’t share anything about diagnosis, but is this a good time for me to reach out to Mary? If not, when should I check in with you again?”** Keeping this promise to Physician Allies will engender deep trust and they’ll work more closely with you.
- **Ask Benefactors and Prospects to visit with Physician Allies to hear about the impact** of past gifts and/or the potential impact of new gifts. Our research shows that you get a yes to a visit three times more often when the visit is with the Physician.
- **Don’t be afraid to ask the Physician Allies to role play** what they will say during the visit. They are the expert in medicine but you are the expert in philanthropy. Avoid slides and other “academic” media; instead have the physician tell the story of the impact a gift has or will have.

Physician Ally Evaluation Grid: Focus on Deeper Relationship with Fewer Docs

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| High Wealth of Patients | Quad II Second Best Physician Partners Link them with a philanthropically appealing Program | Quad I Best Physician Partners Focus most of your time Here |
| | Quad IV Least Effective Physician Partners | Quad III Third Best Physician Partners Target a Few Patient Prospects |
| Low | Oversees/Aligned with a Program Needing Philanthropy | |
| | | High |

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