

Recruiting: Cold Calling to Find Exceptional Trustees

You've probably never had to do this kind of thing before. But, if you don't have any viable leads for a specific skill set that your board needs — or if you need to break out of a recruiting rut — targeted cold calling can help.

Let's say you're looking for someone with legal experience.

You could reach out to a local law firm to see if someone on their team might be interested in giving back to the community. Here's how...

Place a cold call to the firm's human resources department. Be clear and concise about who you are, what your organization's mission is, and what board service will look like. Ask them if they could be helpful in your search.

Ask if you can follow up via email. Send them that job description. It explains what your organization is and exactly the kind of person that you're looking for on your board.

The key is to be strategic *and* specific.

Being as specific as possible with those kinds of details will make the person on the other end of the phone much more likely to be able to assist you if they have all the information that they need.

The boards who aren't successful with cold calling are the ones who say to whoever answers the phone something like, "Hi, I'm looking for board members. Please let me know if you have anyone that might be interested."

Try engaging or cold calling these top referral sources:

Corporate leaders in your region.

Consider the closest office of the big management consulting firms (ex: Bain or McKinsey), as well as high-profile law firms or accounting firms. Consider specific areas of expertise at local corporations (e.g. the heads of HR, marketing, finance, PR or other departments)

Anyone you know to be a super networker and connector

You want people on your board who can help you find potential candidates. And you want to connect with people who, even if they're not right for your board, can be a great referral source or connect you to other people.

Local nonprofit and political leaders who support your mission

Local nonprofit and political leaders who are aligned with your mission may be great potential candidates or referral sources. Plus, you might need more than trustees to lead your organization, such as through an advisory group. Or, you might need non-voting committee members to help round out your board.

Local college and university presidents

Think about whether there are local college or university presidents or other leaders who might be interested in serving on your board. This is a great way to connect to the postsecondary education organizations in your community. It brings in the educator's perspective, but in a different setting. And, these people tend to be great connectors, with expertise in fundraising and community relations.

Your local Chamber of Commerce

This can be a great channel for reaching people who are interested in giving back to the community and have the business acumen or connections you need to build your board or even your donor base.

Current or potential donors

Someone who's already provided considerable financial support to your organization clearly understands and believes in your mission. Or, some high-profile members of your community might actually be more strategically valuable as funders rather than board members or even referral sources. What would it mean for you to have their financial support as a really good sign that they're truly aligned with the mission and vision of your organization?

Affinity groups

Affinity groups can be very helpful, especially if you're looking for a very specific type of characteristic.

To get the most out of referral sources and cold calls, prepare and follow through.

Every time you reach out to a referral source, you are representing your organization. Be prepared for the conversation and prompt with follow through.

Don't waste their time, and don't give them an easy out. Be as specific as possible about what you're looking for. Clearly articulate the skills, qualities, diversity, and time required of the candidate you're looking for.

Have written materials that can easily be circulated via email, or otherwise online. Make sure to include basic information about the school, a link to your website, and a job description with performance expectations.

<https://bot-support.transact.com/portal/en/kb/articles/recruiting-cold-calling-to-find-exceptional-trustees>