




## LEARNING OUTCOME

### After participating...

...you will be able to use improved visit strategies to execute more valuable prospect visits.

■ AGENDA


- Preparing for a more productive meeting
- Best practice tips to keep you focused
- Reinforcement of key fundraising essentials
- Successful meeting strategies
- Post-meeting/next steps

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■ REFLECTION

*“Inside my empty bottle I was  
constructing a lighthouse while all  
the others were making ships”*

*~ Charles Simic*

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## PREPARING FOR A PRODUCTIVE MEETING




CHAT


How would you describe a  
productive meeting?




**KEY  
INGREDIENT**

- You met or took an important step in meeting your outcome!
- Without it, your meeting was “nice”

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 **CHAT**


**What hurdles get in the way  
of productive meetings?**


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**TIME AND  
TIME AGAIN**

- No strategy
- No focused outcome
- No desired next step
- No move


Make sure you do not have NO's!!

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 **TAKEAWAYS**

Our session today is to provide discipline and focus to ensure every meeting has:

- Strategy
- Desired outcome
- Conscientious approach to a move

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## THE MEETING ITSELF

- Begin with the end in mind
- What is your core objective
  - Data mine?
  - Qualification?
  - Strategy development?
  - Engagement/rekindle the fire?
  - Cultivation?
  - Upgrade?
  - Ask?
  - Role model?
  - Steward?



## THE MEETING ITSELF

20 minute timeline

- 5 minute warm-up, including restating why you are there
- 7 minutes probing questions
- 5 minutes move/making case
- 3 minute recap and next steps



## ■ THE MEETING ITSELF

30 minute timeline

- 5 minute warm-up, including restating why you are there
- 14 minutes probing questions
- 8 minutes move/making case
- 3 minute recap and next steps



## ■ THE MEETING ITSELF


60 minute timeline

- 10 minute warm-up, including restating why you are there
- 35 minutes probing questions
- 10 minutes move/making case
- 5 minute recap and next steps




■ WARM UP

- Build trust
- Introduce or re-state why you are there
- Look for common connections
- Take from cold to warm, or warm to warmer
- Set tone
- Make clear transition to next stage of meeting

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■ WARM UP

- Thank them for their time
- “My goal for the meeting is...”
  - Learn more about your relationship with XXX
  - Share how philanthropy makes an impact at XXX
  - Discuss how you can support/make a difference/invest in XXX

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## PROBING QUESTIONS

- Every good meeting needs at least two!
- Prepare... which questions will guide you to your desired outcome?
- How can probing questions connect the dots?



## PROBING QUESTIONS

- *From whom did you learn to be philanthropic?*
- *Would he/she/they make a gift to XXX if asked? What factors would contribute to that decision?*
- *Do you feel an affinity/connection to the work we are doing?*
- *What are their philanthropic interests? Where does XXX fit in to their charitable giving?*



## MOVES/MAKING YOUR CASE

- Be clear and concise
- How can they be a part of the solution/assist/make an impact?
- Why is their giving/participation important?
- What role do you want them to take?
- Aspirational opportunities!



## WRAPPING UP

- Thank you's are critical, regardless of outcome
- Always leave camp better than you found it
- Verbalize next steps
- Repeat back one or two key statements to demonstrate thoughtful listening



## ■ IN ALL MEETINGS


- Look for verbal and non-verbal cues!
  - Follow Your Strategy/Talking Points
  - Adjust to Donor's body language
  - Adapt Your Style
  - Know Your Style
  - Never Leave Without a Next Step

## QUESTIONS

**GOLDEN RULES**

The Importance of Silence


- We should talk less than 30-40% of the meeting
- Optimal is 75%/25% split
- Build silence in to your talking points
- Over talking our donors is talking away the opportunity
- It is not only an important ask strategy

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**GOLDEN RULES**

The Importance of Silence


- Story Listening will assist if you are an “over talker”
- Utilizing Story Listening as a fundamental part of your strategy
- Story Listening, when done right, is foundational to a moves based meeting

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**GOLDEN RULES**


Materials

- How do you utilize them?
- Do not allow them to be a crutch
- Consider them as takeaways or follow up items instead of a star attraction
- Think about timing, how it supports your overall strategy
- Donors do not give to case materials, they give to impact

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**GOLDEN RULES**

- Respect the institutional relationship
  - Institution First
  - Longevity (past and future)
  - How many times have they had to tell their story?

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## GOLDEN RULES

Respect time... but also keep on eye on it

- Doing so builds trust
- Doing so builds credibility
- Allows you to do what you said you would do
- Can we your greatest friend...or greatest enemy (remember discipline and focus)




## TRANSITIONS


- Every meeting needs them
- Especially effective when you are staffing others
- Critical to your success
- Need to be smooth, effortless
- Practice
- Role Play
- Need to match your style



**TRANSITIONS**

- We said we would meet for 20 minutes, and I want to be respectful of time...
- Would you be comfortable if we shifted the conversation to XXX?
- I promised when we spoke on the phone that I wanted to discuss XXX...
- Your feedback on XXX is critical to our next steps, would you tell me about...?
- I wanted to ask you about XXX...

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 **CHAT**

**What transitions have worked well for you?**

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**?** QUESTIONS

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SUCCESSFUL MEETING STRATEGIES

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**TALKING POINTS**


- Following desired outcome and strategy, these are your most important tool
- Provide discipline and focus
- Remind you of where you want to be
- Allow you to quickly transition
- Ensure that you keep ownership of the meeting flow

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**REAL STRATEGIES,  
SCENARIO ONE**

Talking points

- Mary Ann Jones/Nigella Streeter
- April 26, 2017
- Objective: To further update Mary Ann on the Aquarium Expansion, ask for her commitment to joining the Aquarium Expansion Cabinet, and share need for \$2 million to begin scoping work.

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## REAL STRATEGIES, SCENARIO ONE

- Thank Mary Ann for her continued support of the Aquarium. Her personal commitment has kept you buoyed as you work towards the dream of expanding the Aquarium.
- Your recent conversations with the Chancellor lead you to believe that he will support the project.



## REAL SCENARIOS, SCENARIO ONE

- Critical next steps include:
  - Meeting with Jill and Peter to ask for their conceptual support (The Chancellor set the stage for this meeting to happen, and your intent is to speak with Jill and Peter in the next 30 days)
  - Secure \$2Million to begin the scoping project
  - Begin formalizing the Aquarium Expansion Campaign Committee



## REAL SCENARIOS, SCENARIO ONE

- Thank Mary Ann for her past interest in the Aquarium Expansion.
- You will be looking for a small group, 4-8 folks who will assist the Aquarium through the Expansion process, and be philanthropic champions for the Aquarium through their own philanthropy, as well as through making introductions to others.




## REAL SCENARIOS, SCENARIO ONE

- Key tenets of the expansion committees charter include:
  - Make a leadership gift of \$1 Million or More
  - Assist with engagement/cultivation activities (peer screening; salon events; introductions)
  - Be a vocal champion and supporter for the Aquarium
  - Goal is to confirm who will serve on this committee in late Fall.




■ REAL SCENARIOS,  
SCENARIO ONE

- How does this fit with Mary Ann's own wishes for the Aquarium?
- How would she envision a leadership role?
- What would we need to do to secure her involvement as both a volunteer and a donor?
- Does Mary Ann think serving on the committee is something she still has an interest in? (discuss why or why not)
- If yes, discuss others who you hope to approach

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■ REAL SCENARIOS,  
SCENARIO ONE

- If also a yes, build case for the next step, which is securing a \$2 Million dollar gift to fund the scoping phase of this project.
- This phase is critical, as it will allow us to go through all of the critical planning steps including final design, environmental studies and creating a formal timeline and budget for the project. The scoping phase will also lay the foundation with the Chancellor and the Board of Regents.
- The person or family who makes this gift will need to believe in the Aquarium's vision almost as much as I do.

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■ REAL SCENARIOS,  
SCENARIO ONE

- Mary Ann, I believe you and your family are those visionaries.
- Would you consider partnering with me and xxx as we recreate what ocean exploration and science education are in this community?
- SILENCE, let her answer/process/think, and do not respond until she has thoroughly answered




■ REAL SCENARIOS,  
SCENARIO ONE

- If she has an interest, ask what would be the best way to proceed with her and the family
- If she is not (may want to know campus is completely behind project, discuss next steps)



**REAL SCENARIOS,  
SCENARIO ONE**

- Either way, promise to keep her informed of the conversation with Jill and Peter, and each conversation with proposed Cabinet members
- Thank her for her ongoing friendship, and for being a sounding board for you. You look forward to continued conversations as this project moves forward

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 **QUESTIONS**


**QUESTIONS/COMMENTS/  
OBSERVATIONS**

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**REAL SCENARIOS,  
SCENARIO TWO**

Meeting Outline


- Lunch with Carol Le Frank (prospect) and Barb Peltier (Board Chair)
- May 6, 2017
- Objective: To further engage both Barb and Carol, build case for top philanthropic priorities and ask for their assistance in opening doors/consider their own philanthropic support.

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**REAL SCENARIOS,  
SCENARIO TWO**

Key Points

- Barb to role model behaviors/passions
- Leave with a better understanding of Carol's interest in organization (philanthropic and as potential volunteer)
- Weave Carol's passions with organization
- Build philanthropic support for organization

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## REAL SCENARIOS, SCENARIO TWO

- Barb to share her appreciation for Carol's role as a community health advocate, share her own role as Board Chair
- Key Questions:
  - How has Carol's role as a community health advocate brought her to care about XXX?
  - How has she philanthropically supported other organizations she has been involved with?
  - Of these, which has been most meaningful, and why?



## REAL SCENARIOS, SCENARIO TWO

### Building Case:

- Share Wellness Center Concept (ask for Carol's view of our vision)
- Barb to discuss her role as Board Chair (organization) and philanthropic champion for Wellness Center
- Align Carol's commitment in community to our case
- Barb to ask Carol if she too would play a role with our Wellness Center (donor, volunteer, advocate)





## REAL SCENARIOS, SCENARIO TWO

- Discuss Salon Event to build case in community
- Ask for Carol's endorsement and participation
- Our goal is to move Carol from champion to donor (depending on reaction, share giving chart and options)



## REAL SCENARIOS, SCENARIO TWO

### Next Steps

- Discuss commitments, timeline and next steps
- Discuss roles and follow up steps
- Reiterate role of Wellness Center in community and alignment of Carol's passion to ours
- Thank both Barb and Carol for their leadership (be specific)



 **QUESTIONS**

**QUESTIONS/COMMENTS/  
OBSERVATIONS**

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**THE DIFFERENCES IN ROLES**

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## **PRESIDENT/ CHANCELLOR**

- Face, Voice, Community Lead of Institution
- Top Authority
- Visionary
- Strategist
- Respect Figure
- Priority Setter
- Role Model
- After here, then where?
- Use in leadership, start, ask situations



## **ACADEMIC LEADERSHIP**

- CEO of the School
- Vision of the School/University
- Voice of the School
- Door Opener/Closer
- Leadership/Authority
- Informed
- Champion of Philanthropy
- Community Face/Presence



## DEVELOPMENT PROFESSIONAL

- Lead Development Professional
- Filter
- Manage Relationships/Moves Management
- Oversee strategies and moves, and provide direction to the development team (leading some, supporting others)
- Conductor (Qualification to Stewardship)
- Teacher/Mentor
- Collaborator across campus



## BOARD MEMBERS/ VOLUNTEERS

- Share their passion
- Serve as an advocate/champion/extension for institution
- Prospect identification
- Candor and feedback
- Open doors, provide linkages
- Be present
- Role models



## STUDENTS/ FACULTY

- The Heart of the School/Programs/Initiatives
- The “Product”; Proof is in the Pudding
- Storytellers
- Partners
- Advocates/Champions/Passion



## PHILANTHROPY IS A TEAM SPORT

**Talent wins games, but  
teamwork and intelligence  
wins championships**

*~ Michael Jordan*



**?** QUESTIONS

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POST-MEETING

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**FOLLOW UP**


- Thank you
- Update strategy (Has your desired outcome changed? Who needs to be involved?)
- Contact report
- Institutional coordination
- Tasks/Next Steps/Portfolio Management

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**REFLECTION**

- What did you do well?
- What did you learn?
- What would you change?
- How did others do?
- What are the coaching opportunities?
- How does this impact other strategies?
- Yes, No, Yes

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 RESOURCE

# Strategy Template

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 QUESTIONS

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## TAKEAWAYS

- Effective meetings deserve thought and care
- Discipline and focus are your two greatest tools in creating effective meetings/strategies
- Build your style and approach in to your strategies
- Remember the Golden Rules
- Always stay focused on your desired outcome!



## EVALUATION

### Thank you!

Please remember to complete the event evaluation. Your comments will help us continually improve the quality of our programs.

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