



LEARNING OUTCOME

After participating...

...you will be able to use improved solicitation strategies to increase your ask engagement and success rate.

OVERVIEW

- First thoughts
- Before the ask
- The ask itself
- Overcoming objections
- Conducting the proper follow-up
- Role-plays scenarios

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**REFLECTION:
THE INCREDIBLE
ODYSSEY**

"The Mock Turtle, in a deep hollow tone, said: 'Sit down, and don't speak a word 'til I've finished.' So they sat down and nobody spoke for some minutes. Alice thought to herself, 'I don't see how he can ever finish if he doesn't begin.'"

-Lewis Carroll



■ IN GENERAL

- If you don't ask, you will not get a gift
- The main reason people don't give is because they are not asked
- Asking can be the start of negotiating, but if you don't ask, you will never negotiate

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CHAT

THINK OF A SUCCESSFUL
FUNDRAISING ORGANIZATION.
What makes them successful?



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STORY TELLING VERSUS STORY
LISTENING



■ HOW TO STORY- LISTEN

- From whom did they learn to be generous?
- What is their perception of your work?
- What is important about their family situation? Their business situation?
- What is the worst business decision they have made?

■ MASTERING THE MAJOR GIFT PROCESS

- Less willing to make long commitments
- Closer management of their money
 - Donor-advised funds
 - Family foundations
 - Community foundations
 - Alumni-interest opportunities
- Less interest in endowment

A NEW SENSE OF URGENCY/ OPPORTUNITY

- Telescope the process
 - Positioning
 - Why this project
 - Leveraging
- Why this donor?
 - Call to leadership
 - Proven prosperity
- Why the urgency/why now?
- Specific amount
 - Well-researched
 - Realistic
- Allow time and other ways to deepen understanding



KNOW YOUR STRATEGY

WHAT ARE THE KEY TALKING POINTS?

- Key objective
- Flow of meeting/script
- Define roles
- Include scenarios
- Include transitions

FOCUS ON DESIRED OUTCOMES!!



■ SETTING UP THE MEETING

- Do your homework
- Be prepared
- Understand the needs/desires of the prospect
- Match those needs to your institutional benefits
- Have briefing materials, talking points and 3-5 probing questions
- Gather your team and set the strategy
- Practice, practice, practice



■ SETTING UP THE MEETING

- Be forthright:
 - You've been a long time supporter of...
 - You've been so involved in...
 - I'd like to talk to you about an important project...



■ SETTING UP THE MEETING

- Be careful (You can get trapped into doing your ask on the phone but avoid it at all costs)
 - You'll get a smaller gift than otherwise
 - You might not get a gift at all
 - Don't talk the gift away



■ PREPARING FOR THE MEETING/ OUTLINE OF TALKING POINTS

- Greet the prospect and introduce your organization
- Explain why this meeting is taking place
- Talk about the need and the prospect's interest
- Ask for the gift or establish an agreement to go forward



■ PREPARING FOR THE MEETING/ OUTLINE OF TALKING POINTS

- Be silent
- React and agree to any negotiation process
- Add any special requests and/or invitations
- Repeat what the prospect has agreed
- Say farewell



■ ASKING FOR PERMISSION

- Do You?
- Why or Why Not?



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THE ASK ITSELF




■ THE MEETING ITSELF

- Warm up
- Thank prospect for making the time
- Build organically
- Shift the conversation to your organization
 - Their most recent engagement
 - Their previous support
 - Their particular area of interest
 - Put them in the picture
 - Show how can they make a difference
 - Make the match




**THE ASK
ITSELF**

- Affirmation or confirmation questions
- Ask for a specific amount (with confidence)
- Talk about the vision it will help fulfill for the institution
- Link it with the prospect's interests
- Talk about benefits to the organization and the donor
- Be honest (don't overpromise)
- Be clear and straightforward
- Be positive and passionate



**OUR
COMFORT
VERSUS
THEIRS**

- "From your long history and support of our institution, it is clear our mission resonates deeply and personally with you. We are convinced that your next leadership-level gift will enable us to serve in ways we could only dream of three years ago. Will you consider giving. . ."



■ OUR
COMFORT
VERSUS
THEIRS

- “You have given in support of so many initiatives that have made a difference in the lives of others. We believe this program will have the biggest, positive impact yet and are inviting leadership donors like you to help us transform more lives. . .”




■ OUR
COMFORT
VERSUS
THEIRS

“You have partnered with us in so many ways recently, and you’ve seen the progress we’ve been able to make on the issues that are important to you and our institution. That’s why today, we are excited to invite you to take a next step with us. . .”




**THE ASK
ITSELF**

- Be silent
 - Wait for a response
 - Remain composed
 - Let the donor answer and listen to it
 - The first response may not be the final one




**THE ASK
ITSELF**

- Be silent
 - Maintain eye contact while noting down key words
 - Needs
 - Problems
 - Questions and concerns
 - Include the time period over which the gift may be paid




THE ASK ITSELF

- Expect a “yes”, and be ready to respond




THE ASK ITSELF

<p>YES</p> <p>Thank the donor and have a next step in mind</p>	<p>LET ME THINK ABOUT IT</p> <p>Thank the donor, ask questions, suggest materials to assist with decision, have one to two next steps in mind</p>
<p>NO</p> <p>Thank the donor, and have options to suggest or questions to answer to assist with next step</p>	



**THE ASK
ITSELF**

- Respond to questions/concerns
 - To show your understanding, repeat back key words
 - Prompt briefly to get more information, but now is not the best time to reply to each concern - let the prospect keep talking



 **QUESTIONS**



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OVERCOMING OBJECTIONS



■ TOPICS OF OBJECTIONS

- The people/my experience at the institution
- The institution's status vis-a-vis others
- The mission or campaign objective
- The gift purpose
- I don't like naming...



TOPICS OF OBJECTIONS

- I'm not really interested in buildings...
- Timing and gift competition
- Everyone has their hand out...
- Our assets have depleted significantly...
- I don't like your gift fee...
- Trust of "Perpetuity"




HANDLING OBJECTIONS

- See this 'objection' as something positive
- It is the first stage in "getting to yes"




HANDLING OBJECTIONS

- It is a positive part of the process of creating agreement and creating a real partnership
 - Don't run away from it
 - Repeat back their concern to confirm what he/she means
 - Enjoy the discussion - it's an opportunity to involve the prospect by working through their objections




HANDLING OBJECTIONS

- Ensure that everyone on the ask team is prepared for objections, and knows what to say




**HANDLING
OBJECTIONS**

- Do not take them personally
- Do not believe objections mean “no”
- Objections are a way to make up our minds



**HANDLING
OBJECTIONS**

- Most objections are a good thing in asking
 - Prospect is carefully listening and giving serious feedback
 - Prospect is usually telling you what you have to deal with to get a gift
 - Objections, when probed, provide clear next steps



■ THEY PROMISED TO DO SOMETHING

- Was there a specific ask made?
- Don't use to defend a poor solicitation!

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CONDUCTING THE PROPER FOLLOW-UP

SAMPLE CLOSING QUESTIONS



- "Are you in a position to decide at this time?"
- "Would you like to bring your spouse/partner to see the program?"
- "What further information do you need?"
- "Can I introduce you to the chief "x" involved?"
- "Would you like to think about the opportunities for having your name on x?"



CLOSING

- We fail to close solicitations for several reasons
 - We never actually ask for an amount
 - We avoid testing or checking for closure
 - We are afraid of being turned down
 - We fail to identify prospect's needs during initial steps of the solicitation
 - We fail to summarize progress from earlier stages



CLOSING THE LOOP



- Confirm what the donor has agreed to do
- Try to keep the initiative for the next step with you
- Repeat all agreements, questions, and things to be resolved
- Say “thank you”
- Send a thank you note that repeats the above
- Follow-up with institution appropriate agreements

CLOSING THE LOOP



- Thank you/acknowledgements from the university
- How many? From whom?
- Level of person thanking should depend on size of gift/pledge
 - Major gift: president or board chair
 - High annual gift: VP of advancement or other staff
 - Annual gift: volunteer or staff

■ IMPORTANT CULTURAL TIPS

- Create an organizational structure for giving
 - Start talking about asking/use the language
 - Understand your role and that of others
 - Don't become isolated
 - Track your contacts
 - Celebrate the "wins"



■ IMPORTANT CULTURAL TIPS

- Recognize individuals and teams for solicitations (not just closed gifts)
- Lose your reluctance/remember there is no "perfect"
- Understand and embrace your style
- Just do it anyway



? QUESTIONS

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ROLE-PLAYS

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RESOURCE

THREE SCENARIOS

Dean issues

Details guy

The quiet responder



TAKEAWAYS

- Self-confidence is key
- Build your style (and that of others) into the strategy
- Get over the hurdles
- Prepare!



TAKEAWAYS

- Know your role and the roles of others (and agree on those roles for each)
- Objections are opportunities
- Every no is one step closer to a yes
- Close!
- You have to make the ask!



TAKEAWAYS

THE JOY OF ASKING


A fundraiser stood at the heavenly gate. His face was scarred and old. He stood before the man of fate, for admission to the fold. "What have you done," Saint Peter said, "to gain admission here?"

"I've been a fundraiser, sir, for many a year."

The pearly gates swung open wide, Saint Peter rang the bell. "Come in and choose your harp," he sighed, "you've had your share of hell!"



QUESTIONS






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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