

SAMPLE FROM THE BOOK

**PRODUCTIVE
CONVERSATIONS
WITH DONORS**

**A HANDBOOK FOR
FRONTLINE FUNDRAISERS**

KATHY DRUCQUER DUFF, CFRE

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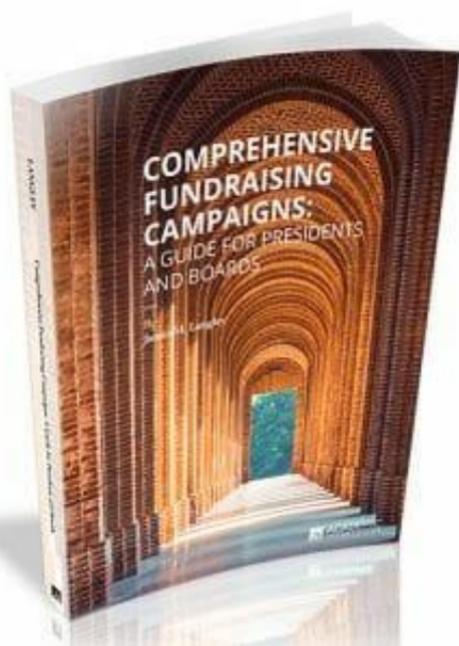
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FOREWORD

Why you need this book and what you'll learn from it

As fundraisers, we have many responsibilities that, when allowed, will get in the way of our primary function: building authentic relationships with an aim of enhancing philanthropic support for our organization.

When staff members walk into my office and share that they are experiencing a lack of enthusiasm for our work, are burned out, or are getting caught up in the smaller details of their jobs, I always ask the same question: “When was the last time you were on a donor visit?” The answer I receive usually lists out all of the other things that they have on their desks. The most important role that we provide our institutions is to build relationships on behalf of our organizations and to move those relationships to a philanthropic gift.

When we are inspired by our philanthropic partners, that inspiration allows us to be the very best in our roles. Being in the field, visiting with our donors and prospects, and listening to the ways individuals want to make a difference for our organizations is the best pick-me-up we can find (and that is a critical element of being a high-performing gift officer). I have yet to meet a committed fundraiser who does not enjoy time with our organization’s friends and prospects. Building, growing, and enhancing relationships that lead to phil-

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anthropic giving is our highest-priority work and the greatest contribution we make to our institutions.

To truly be high performing, we need to not just cultivate and solicit but strengthen the relationships between our prospects and donors and our institutions. This requires discipline and focus.

Yet, this discipline is often lacking. We as fundraisers talk about over-cultivating or under-qualifying, and we wonder what else we can do to prepare a prospect for an ask. In this book, I will challenge us and suggest that perhaps it is not about under-qualifying or over-cultivating, but rather about not making the very best use of our time with our prospects and donors. Often, we think donor meetings are about being “nice,” but we are not in the business of building “nice” relationships. We are responsible for building meaningful relationships and for moving those relationships towards transformative, impactful, or participatory philanthropy.

Simply visiting with someone is not enough.

TIP

When thinking about a donor strategy, ask yourself, “What do I need to know to move this relationship to an ask?”

How probing questions make us better at what we do

Some of the greatest tools we have for building authentic relationships are storytelling and the use of probing questions that will simultaneously inspire our donors and educate us. A few good questions, such as "How did you learn to be generous?" or "Is giving something that is important to you and your family?" can reveal a roadmap for moving forward. That can ultimately result in a lifetime of giving. The use of a few deliberate questions takes what would have been a "nice" meeting and creates in its place an encounter that allows us to build a meaningful and engaging strategy so that we can give our donors the vehicle to enhance, inspire, and transform our organizations. These probing questions allow us to be more accountable and more purposeful in our roles.

Often, a core part of these conversations involves educating individuals who are new to giving about how their support *is philanthropy*—and that gifts of every shape and size make a difference. Many think that philanthropists are only those about whom they read in the paper, the ones who make multi-million-dollar gifts. Yet philanthropists are more than the dollar amount given; philanthropists are change agents, cheerleaders, visionaries, or champions for our organizations. They are people who care deeply about the causes they support and who intentionally choose the organizations they see as the best vehicles for fulfilling their passions.

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Talented development officers understand that we not only provide prospects the opportunity to be donors, but we also provide the vehicles to turn their passions into inspiration. Through the use of probing questions, we learn about our prospects' views on charitable giving, their definition of philanthropy, and where in their lives they learned to be philanthropic. This is important to know because generations, cultures, genders, geographic areas, etc. tend to give differently. Understanding the different motivations (both generationally/culturally and values-based) allows you to find the right match for the donor and the institution.

Philanthropists are more than the dollar amount given; philanthropists are change agents, cheerleaders, visionaries, or champions for our organizations. They are people who care deeply about the causes they support and who intentionally choose the organizations they see as the best vehicles for fulfilling their passions.

As philanthropy continues to evolve, donors will continue to be more direct about the impact they want their gifts to have and the way they hope their giving will be valued. We have an opportunity to share with them that their participation is deeply valued and that their loyalty and support transform our mission and our programs. We are in the role of creating philanthropic champions, and that is a role that gives to both the donor and the institutions that we serve.

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Many studies have found that advancement professionals who are curious are often our highest performing gift officers. The ability to ask questions in an authentic way, listen for cues, and then add additional questions to the conversation allows us to identify the beliefs, desires, and dreams of our prospects. With this knowledge, you can determine fit, build strategy, and find that match between your institution's vision and your donors' desire to make a difference. But it is not just about being curious; you have to be inquisitive in a way that is also organic and genuine. Asking questions for the sake of asking questions is off-putting to those we meet with, and it is a sloppy, unprepared approach to advancement work. A relationship that is built on trust and shared goals is critical in the work that we do. Ensure that those you meet with know that you will be asking questions as you build a relationship with them. Thoughtful, probing questions can result in incredible insight, but a prospect must be prepared for them first. Share that you're going to be asking questions and why.

This book will give you new tools to support curiosity and inquisitiveness, as well as build upon self-confidence. This book will also provide new approaches for being persistent in an authentic manner. Each of the chapters ahead will provide a primer on how to ask probing questions to make the most of various donor visits and scenarios.

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PART 1

HOW TO USE PROBING QUESTIONS TO ENGAGE DONORS

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CHAPTER 1

ASKING A DONOR POWERFUL PROBING QUESTIONS: A PRIMER

“Always ask the questions you want to. Life is too short to know if you’ll get a second chance to ask, and afterlife is probably too long to wonder what the answer may be.” —Kaitlin Hollon

Probing questions are a tool to help you understand your donor’s backgrounds, values, beliefs, and motivations. They are questions that allow you to put pieces together, to better understand what your donors hope to achieve. The answers to these questions give you a road map for building a meaningful relationship between the donor and your institution.

Technically, probing questions should provide opportunities to ask for additional information, request that the person expand on what he or she has said, or invite the person to go deeper. Using probing questions can be helpful in increasing understanding, since most people need to be encouraged to go beyond what they have said to help someone understand their deeper feelings, values, or opinions.

When deployed well, probing questions are critical tools that:

- Indicate interest and a desire to understand,
- Set the stage for strategy,
- Provide perspective on our donor's reality,
- Allow us to look at situations from a variety of vantage points,
- Move a relationship from conversational to trusting,
- Allow us to see things from our donors' perspectives instead of our own, and
- Are essential to everything we do.

3 keys to getting others on board

In building authentic relationships, probing questions assist—but it is also important to keep three core values top of mind.

1. Assume less.
2. Accept more.
3. Listen well.

These three allow you to be sincere in your probing, as well as an attentive partner in building the relationship.

I cannot overstate the importance of listening well. Too often, we are so eager to share our knowledge of our institution or the vision that we believe will move our donors that we do not truly listen to what our donors and prospects have to say. Or

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we decide what amount our donor should give, or to what project, without yet truly understanding their passions, their desires, and their visions. We have read past contact reports/prospect research and have decided “who” our prospects/donors are without seeing their passions through their own lenses. Then the conversation becomes focused on what we want for our institution or the success we believe a certain gift will bring. I encourage you to take the time to let your donors dream. Let them share. Listen to what they have to say. And then make the match to a partnership and our opportunities.

This requires *assuming less*. Let our donors make decisions without us getting to the conclusion first. How often have you said that a prospect will not give due to a personal circumstance that they have shared? That is an example of us making assumptions about our donors’ decisions. STOP!

By *accepting more*, we are able to let the donors guide the conversation, instead of us taking them where we want them to go. And by listening well, we allow our probing questions to do the work.

To be an effective and high-performing gift officer, you must be able to “story listen.” This means putting aside our agenda and instead focusing on what the donor is telling us.

Authentically asking and listening

Hand in hand with listening is the ability to ask questions authentically and allow conversations to grow organically. While we often script out meetings and even script what we hope to say, it is critically important that we converse, that we do not rush, and that we do not report/tell/direct. A critical component of probing questions is to invite participation in the conversation. Our goal should always be for our prospects/donors to speak 70% of the time.

When we ask questions and listen authentically, we are fully attentive to the other person. We ask questions that are not leading, diagnostic, or confrontational. We listen in order to comprehend. Perhaps most importantly, we expand our ability to match the passion and mission of our donors to our organization's passion and mission. The more we ask thoughtful questions, the more chances we have to build relationships in a meaningful way.

Donors will provide you with a road map to making the ask—if you let them. Listening and asking authentically happens beautifully with the use of powerful and probing questions, so make sure you are ready to listen and then engage. Your institutions, your donors, and you will all be better served when you truly listen and value what your donors share with you.

What happens when you ask others probing questions?

When you take the time to ask others probing questions, you will find that you obtain information that allows you to build informed strategies. This eventually leads to better decisions and outcomes for both the donor and your institution. Additionally, in this process, you will build more meaningful, engaged relationships, and people will be more likely to trust you. Finally, you will, in turn, be asked questions that allow you to best match donor desire with institutional vision.

Throughout this book, I deploy powerful probing questions into topical areas that can be used throughout building a relationship with a donor. As you plan your donor strategies, you may want to think about where you are “stuck” or what information would help you move a relationship further, as you consider what probing questions to use in your donor scenarios/meetings/strategies.

KNOW YOUR DESIRED OUTCOME

Is your objective to better understand how your prospect feels about your institution?

Are you trying to determine capacity, inclination, or desire to give?

Do you want to know how an individual/family/organization makes philanthropic decisions?

Do you want to engage someone as a new or expanded volunteer?

Is your goal to cultivate their relationship with leadership?

Are you trying to figure out what your ask can/should be?

Do you hope to better connect the dots?

Do you need more information to have a place from which you can begin?

Knowing your desired outcome will assist you in deciding which questions will be of greatest assistance.

In addition to the donor strategies outlined later in the book, the next chapter (Chapter 2) will provide probing questions to help with:

- Rekindling the fire
- Mission-driven questions
- Understanding donors
- Understanding philanthropic priorities and giving motivators
- Leadership
- Fiscal stewardship
- Connections
- Inviting donors to become partners
- Recognition

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- Vehicles for giving
- Continuation questions
- Affirmation questions

Using probing questions can assist you in all of these situations and more.

This concludes your free sample.

Purchase this book at:

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