

Making the Ask

Key principles:

- Lead with your heart – why is this so important to me that I made my own gift?
- You're not asking for yourself – you're asking to help other people
- People give to people – tell the stories of the people who will be helped
- Know the case – and focus on outcomes
- Listening and asking questions is more important than talking
- Your goal is to get a JOYFUL YES by finding a way for the donor to express their wishes for a better world by a gift to your organization
- It's about empathy, energy and enthusiasm

Getting the meeting:

A committed volunteer with a relationship to the prospective donor calls to arrange a meeting - the first most important step. Once you have the meeting, you are well on your way.

Prospective donors should be visited in their homes, while visits to prospective donors representing corporations and businesses should be made in the prospective donor's office. Try to avoid meeting in a public place; you should always attempt to meet where your prospective donor feels most comfortable.

Sample Phone Introduction

Pleasantries follow by.....

Mary, the reason for my call today is that I would like to get together with you and John to tell you about the Community Foundation of Greater Peterborough. I'm a volunteer with the Foundation and we have a really interesting story to tell. How is next Wednesday afternoon?

(sales technique: suggest a specific time and date)

Objections

1. I've just made a major gift to the (xxxxx) campaign

That's wonderful – I supported that campaign too. The Community Foundation is a newer organization so I'd really appreciate you sharing thirty minutes with me to help me spread the word and if the timing for a gift not right for you, we'll move on – but it would be very helpful for me to hear what you think of our plans. Would an afternoon or evening meeting be better?

3. Let's do this on the phone

I respect your time Mary, but I don't feel comfortable trying to handle this on the phone, I couldn't do it justice. I can keep the meeting to 30 minutes. Would an afternoon or evening meeting be better?

4. Send me a package

I know you'd take the time to review it Mary, but the printed material just doesn't do it justice and as we're a new Foundation your feedback on our plans would be really helpful. I know how busy you are. I can keep the meeting to 30 minutes. Would an afternoon or evening meeting be better?

Preparation:

The first meeting is to advance the relationship and understand the donor's motivations, values and priorities, to surface and address objections and to test possible giving level.

Foundation staff do more extensive research. Staff and volunteer develop goals and a plan for the meeting: anticipate possible objections and design questions to surface and address. Decide who will cover which area of the presentation.

It can take up to 18 months to secure a gift – we move at the donor's pace but need to find ways to keep the momentum going.

The first meeting: "cultivation"

The first meeting is held to advance the relationship and understand the donor's motivations, values and priorities, to surface and address objections and to test possible giving level.

- Spend a little time getting to know the person: take a genuine interest in their home/office etc to break the ice and build your relationship
- Thank them for taking the meeting
- Start with a question to establish the landscape: "What do you know about the Community Foundation?"
- Present your case
- Ask quality questions – see attached – probe for areas of interest and engagement e.g. has this donor been affected by the economic downturn: "I'm so gratified to see many people are continuing to give so generously during this time of economic uncertainty. Has the economy affected your philanthropic giving?". Leads you into "
- Surface and address objections

Questions and concerns are natural when someone is being asked to make a charitable gift -- it does not mean that they will say 'no'. Part of the reason that we do face-to-face visits is to give the potential donor someone to talk to about those questions.

Before you approach someone, anticipate tough questions they might ask...

- Tell me more about...
- How exactly will the money be spent?
- I'll give but only if I can be sure that my donation goes towards...
- I already support the United Way. Why should I give to the CFGP as well?
- What recognition will I get?
- How much did you give?
- How much did John/Jane Smith give?

How to Answer Tough Questions

1. **Validate**

Validate the Prospect's point -- agree or acknowledge it.

For example – "I can understand how you'd feel that way. I asked the same question and what I found out made me feel a lot better about making my gift."

2. **Inquire**

Ask for more information before you begin to answer. Understand the real issue. If you jump too soon, you may create new problems.

3. **Respond Briefly**

Answer very briefly. Pause often to ask the prospective donor if he or she still wants more information. It is easy for an answer to turn into a long-winded explanation. This could bore the prospect. It could also raise new controversies.

4. **Listen Actively**

Give the prospect lots of airtime. Ask the prospective donor more questions. That way you can find out exactly what they think and how much detail they need. You may even discover that you actually agree on the issue.

5. **Never Argue**

Never argue with or criticize the prospect. Protect the organization's long-term relationship with the donor over the short-term fundraising needs or desire to 'educate' the prospect. Return to the appeal as quickly as possible.

6. **Ask for the Commitment**

Bring the discussion back to the needs of the people you serve. (Never emphasize the needs of the organization. People give to people, not to overhead expenses.) Ask the prospect again, to support the people.

The main reason for a cultivation meeting is to ascertain a prospect's interests and potential concerns so that we tailor our solicitation appropriately. Therefore, it is important that you listen carefully to the prospect. Do they seem unconvinced by the case statement, or do they nod emphatically when you explain the need? Do they ask questions about the case statement or appear distracted?

While you will not be asking for a gift at this meeting, the prospect may discuss his or her giving preferences. For example, they may indicate that they like to make their gift decisions at a certain time of the year or that they dislike pledges. Alternatively, you may glean information that suggests a gift of stock would be attractive to the prospect or that a delay in the first payment of their pledge would make a gift easier.

You are trying to complete a puzzle and when you see all the pieces it is time to ask:

- Right purpose – a match to the donor's motivations and values
- Right amount – have we assessed their capacity and philanthropic intent, have we tested recognition levels
- Right solicitors – who can't they say no to? Who will inspire them to give more?
- Right time – what other commitments do they have
- Right place – where are they most comfortable or what setting will enhance the ask?
- Right participants – are the decision makers in the room?
- Right materials – have we helped tell the story visually, can they envision the outcomes? (the materials often play a less important role – many gifts have been secured with no paper changing hands!)

Resist the Temptation to “Rush” the Ask

If a prospect seems eager to make a gift at the cultivation visit stage, it can be tempting to move quickly into solicitation mode. Think carefully before doing this. Without reflecting on a proper “think about” figure or developing a proposal for the prospect, you may end up getting a much smaller gift than you would if you waited to ask them later.

Making the ask (on the 2nd, 3rd, 4th meeting):

Some volunteers find asking for a gift a challenging aspect of campaign fund raising – while others are eager to conclude this stage of the relationship and achieve success. Remember that the most important determinant of your success is the attitude with which you approach the visit. Think positively about the outcome of the meeting and remind yourself that you are not asking for a gift for yourself, but for others in the community and region. Experiencing a ‘joyful yes’ is a wonderful feeling for you and the donor.

Begin the meeting by reflecting on your last discussion, and asking the person if they’ve any further questions, or what areas of the Foundation appeal to them the most. The goal of this part of the meeting is to put the prospect – and yourself – at ease about the visit and establish a rapport before moving toward the ask.

Once you have reaffirmed the donor’s interest in the project, have cleared objections and believe the time and request amount is right, then directly and succinctly ask for the gift.

The best way to begin is by talking about your own involvement in the campaign and the gift you have made (if not the amount, talk about what you want to achieve with your gift and why you feel proud/excited about it). This is one of the reasons that volunteers are asked to make their own gift to the campaign before asking others to give. Making your own gift first enables you to ask the prospect to join you in supporting the campaign rather than asking them to do something that you yourself have not done.

“Mary, I’m glad you are as enthusiastic about this project as I am. I really believe that by investing in (this area) we will (tangible benefits that resonated with Mary). We’d be honoured if you’d become one of our leadership donors with a gift of \$50,000.”

Then shut up!

The donor must be the first to speak so you understand their reaction. Don’t talk your self out of the gift. Don’t apologize for the ask. Don’t waffle about the amount – ask for a specific amount.

Consider:

- If you have made a gift similar to what you are asking for, say that “I have made a gift of xxx and would like you to make a gift of the same”
- Taking a larger gift and breaking it down over time “A gift of \$20,000 a year for five years in order to establish a \$100,000 endowment”

from John D. Rockefeller Jr. 1933 speech

“Never think you need to apologize for asking someone to give to a worthy object, any more than as though you were giving him an opportunity to participate in a high-grade investment.

Turn objections into opportunities.

Don’t assume that a person who is raising objections is saying “no” to a gift. Assume that they are saying, “convince me” or “tell me more”.

Generally, a prospect's response will fall into one of the following four categories:

1. The prospect says "yes" to the gift you have requested

This is the best possible outcome of your meeting. Thank the prospect for their generosity and discuss methods of payment. Have the prospect complete and sign a pledge form indicating the terms of the pledge and payments. Discuss recognition.

2. The prospect says "no" to a gift

This can happen for a number of reasons. Perhaps the timing is not good for them, they may have other charitable priorities or they simply do not wish to support the CFGP. Try to uncover these objectives or concerns to understand and respond to them. If for example it is a cash flow situation you can talk about a legacy gift or a longer pledge commitment that is back-end heavy.

Thank the prospect for taking the time to hear your request and indicate that you hope they will watch the growth of the CFGP and perhaps down the road there will be a project of interest.

Don't take it personally. If the prospect doesn't make a gift, despite your best efforts, don't take it personally. It often takes 3-5 donors to secure 1 gift. Focus your energy on making your next ask a success.

3. The prospect agrees to a smaller gift than requested

While the "think about" figure should be a reasonable and affordable gift for your prospect, some will choose to give less than that amount.

If a smaller gift is offered, follow your instincts. If you feel the offer is final, accept it with thanks. However, if you feel the prospect could be encouraged to increase their gift, express your appreciation but reinforce how giving the suggested ask amount would benefit the public and could be made affordable to the prospect (through monthly payments or a 2-3 year pledge period, perhaps), or how a larger gift from them could raise the giving sights of others.

Remember that once a gift has been offered it is unlikely to be withdrawn. Ask the prospect to think it over and establish a follow-up appointment at which time you can return for your prospect's decision. The bottom line is still to follow your instincts.

4. The prospect asks for more time to consider the request

Frequently, your prospect will require some time to consider your request and may have questions or concerns that you can answer to assist them in making a decision. How you respond to these questions and concerns can make a significant difference in the size of the gift.

It is very important to establish a mutually understood follow-up action and timeframe before ending the visit. This might mean agreeing to meet again within a specific timeframe. It might involve having a more detailed proposal prepared. Corporate prospects may request a presentation with other people in their organization. In order to keep the solicitation process moving, it is critical that you leave the meeting with a mutual understanding between you and the prospect as to what follow-up action will be undertaken.

Do not leave the pledge form with the donor with the expectation that they will complete it on his or her own. This rarely happens and makes it much more difficult to follow up with the donor later as there is no easy reason for another visit. Your job as a solicitor is not completed until the prospect has decided to make a gift (or in some cases decline to make a gift) to the campaign.

Follow Up

Every prospect, regardless of their response, should receive a thank-you note or letter from you immediately after each the visit thanking them for taking the time to meet with you. The Foundation Office will be able to supply you with a thank you letter or note card. While there will be an official thank you for the gift, your personal touch is an important step in the relationship.

The Art of Influence:

Build rapport – display a genuine interest in the person

Listen and observe. What cues is the donor giving you about the way they wish to receive information:

- Are they asking about numbers
- Are they responding with stories
- Are they using visual language “When I look”, “I can see”
- Short abrupt answers may mean you need to get to the point or have objections to surface

Match their body language and style:

- If they are leaning back relaxed, do the same
- If they are forward and engaged, show that same intensity

Reading list:

ASKING – a 59 minute guide

Jerry Panas

The Influential Fundraiser

Bernard Ross and Clare Segal