

Essential Components of the Ask

1. **Make a compelling case for the organization and the need for support**
2. **Use transitional statements to connect donor's interest and/or prior support to the case**
3. **Ask for a specific amount and for a specific purpose**
4. **Remain silent**

Step 1: State your case for support.

Why give to you? And why now? What is the urgency? Use solid, clear and concise language when stating the need.

Step 2: Use transitional statements to connect donor's interest and/or prior support to the case you just made.

A good transition may be as follows:

"Leslie, your support for our wilderness program has put us on the map as the model for these programs. We have the chance to take the program to a national level that is exciting and equally challenging. Let me take a few minutes to share with you what needs to be done to make that dream come true."

Step 3: Detail the benefits of the gift and make the ask.

After the transition, **ask for a specific amount of money for a specific purpose**. Don't ask a donor to guess what is an appropriate amount and don't keep them in the dark about who the money will help and how. Inspire them to make a difference with a particular program or project. If you are asking for an unrestricted gift, explain the benefits of such a gift. Be straightforward.

Next, cover the great things that will happen because of the gift. You've already stated the need, now talk about positive things that will happen once the gift is made—for the people, places and wildlife the organization serves and for the donor, too.

The ask concludes with you and your team being silent. Let the donor speak. This may be the hardest part of all. You don't want to second-guess the prospect's reaction. Pause—and **listen, listen, listen!**

Step 4: Remain silent.

Remain silent and give the donor time to react, ask questions, and give feedback. Pay attention to verbal and nonverbal reactions. Listen intently and offer all the time they need

to state questions and concerns fully. Remember, making a major gift is not an easy or quick decision.

Finally, thank the prospect for their time as well as for listening to you. Wrap up with a final statement of the gift opportunity and its benefits and schedule a next meeting for follow-up. If there are questions you could not answer, let the donor know when you will get back to them.

Best Practices for Donor Meeting

- Ask for advice.
- Ask for the gift.
- The art of asking lies in the listening.
- Go in with a strategy.
- Anticipate the donor's questions and prepare the answers.
- Don't talk too much. No one ever listened themselves out of a gift.
- Don't ask before selling the project.
- Never have a volunteer go with you or by themselves before making their own gift.
- Ask a lot of questions
- Talk about the benefits your organization is providing people, places and animals. Don't focus on the organization and its approach.
- Have alternatives to offer.
- Know everything you can know about the prospect/donor before the solicitation.
- Cultivate the donor before soliciting
- Coordinate your team:
 1. Clarify roles in advance
 2. Set an agenda of questions
 3. Match complementary personalities and styles
 4. Role-play and practice in advance
 5. Be flexible
 6. Pre-arrange signals
- If a second appointment is necessary, schedule the next visit at the conclusion of the meeting. If the donor needs to share the solicitation and materials with a life partner or business partner, offer to meet with these individuals.
- No matter the prospect's response, always conclude each call with a "thank you."

Typical Moves with a Prospect

- Get to know you meeting: Here's our cause and our opportunity – we'd love to have your help. Who else in the community do you think would be interested?
- Personal visit after a gift: Thank you so much – why did you choose to give? I'd love to hear your story.
- Advice visit: Just about the BEST way to get in front of a prospect and develop their interest in your work.
 - Can I come pick your brain?

- Here's our challenge and our plan for meeting the challenge. What do you think?
- A behind the scenes tour of your work: BEST ever cultivation move because the personal experience almost always touches the heart of donors.
- Invitations to special events or briefings.

Things to Say

"Let's talk a little bit about our organization and the impact it makes on our community. I can tell you about some of the work we're doing that helps _____ in a way no other organization does. It seems to me that you're concerned about the need for work in this area. How important do you feel this is? How do you feel about the role of our organization and what it's doing?"

It's good to ask open-ended questions if you're not quite sure how great their interest is. You need to fully explore the situation and go on a fact-finding mission. While you're uncovering valuable information, you're building rapport. And you'll find that the more time you take in seeking rapport, the less it will appear later that you're using pressure.

"Would you consider a gift of \$5,000?"

A question like "would you consider a gift of ____?" accomplishes two things. First, it takes the pressure off the asker. This feels like something they can naturally say. Second, it uses a *specific dollar amount*. Do the donor prospect the courtesy of plainly telling them what number you're thinking about.

"Honestly, I have NO idea how much to ask you for, but is a gift of \$_____ something you'd be able to consider?"

Honesty is quite disarming, and there are times we really don't know how much to ask someone for. So let them know! Most people respond well to requests for help. *Could you help me know how much I might ask you for?* If you're in the ballpark they'll tell you. And if you're too high, they'll tell you, too!

"Would you enjoy__ (name the difference the gift will make or what the gift will accomplish)__ by making a gift of \$5,000?"

This leaves room for the donor to identify their passion and whether making this kind of a gift will align with that passion.

"You've been giving since 2006. We're so appreciative. Would you consider increasing your gift this year?"

People are more easily swayed to do something they've already done. You want to remind them that they've already made this decision.

"For this campaign to succeed, we're going to need pledges at these levels. Where do you see yourself participating?"

Say this and present the gift opportunity page for a prospect that you don't know how much to ask.

"I would like to invite you to join us..."

"Can you help us with a \$300 contribution?"

"Sally, as I mentioned in the letter, we were hoping you'd consider a gift of \$1,000 to support our work. It would mean a lot to us. What do you say?"

"As I mentioned in the letter, we're looking for gifts of between \$500 and \$5,000. I appreciate that this is a wide range, and to be honest, we don't know the appropriate amount to ask of you. How much would you like to give?"

"John and Mary, because of your long-standing commitment to conservation, we want to give you an opportunity to participate in this campaign at the highest possible level. Will you consider a gift of \$10,000 this year and \$5,000 in each of the next four years?"

"I would like you to consider joining our Leadership Circle with a gift of \$5,000."

Common Scenarios

"How did you come up with the amount you asked me for?"

Your response: (Use a printout from [GiftRangeCalculator.com](https://www.gift-range-calculator.com).)

"You see, Bob, the entire project is \$4 million. To reach that, we need three leaders at the \$200,000 level. You seemed like a great fit because..."

People want you to be genuinely interested in them and know them beyond a dollar sign.

"I have to talk to my spouse."

Your possible responses:

"May we both meet with him/her?"

"Just suppose he/she agrees."

"Are there any other questions to which you think he/she will want an answer?"

"I only have 15 minutes to talk with you today."

Your possible responses:

"Is this the only time we will be able to spend together?"

"I'd like to reschedule for a time that's more convenient you, if that's alright."

Condense your presentation and continue.

Donor offers a gift that is too small.

Your possible responses:

"If you could make three or four annual gifts this size, look what we could do!"

Suggest the offered gift as a first payment on a larger one.

Take the smaller gift and upgrade later.

Donor is a non-talker or silent.

Your possible responses:

Ask questions. Look and act interested when the prospect does talk, and then ask more questions.

Go hiking, fishing, etc. where it is not necessary to have a lengthy conversation.

"I'm not really certain. It's something I need to think over."

Find out how the prospect really feels about your program and the request by asking these four questions...:

"Of course you're going to need some more time to think this over. I've suggested a significant gift. But let me ask you..."

Is it the organization?

"As we were talking, you seemed to indicate a great interest in and support for our organization. Am I right about that?"

Is it the project?

"The more we talked, the more I felt that this initiative is something dear to your heart."

Is it the amount I asked for?

"I suggested you might want to consider a gift of \$50,000. I thought that was about the amount you'd want to give to a program like this. Am I correct about that?"

Is it the timing?

"You feel so keenly about this program, perhaps it's the timing that's causing you some concern. If you had an additional year or two to complete your payments, would that enable you to make the \$50,000 gift you seem to want to make?"

Probe some more, ask questions, get deeper into the concern. Remain pointed, interested, completely understanding, confident, and positive.

"This is just not a priority right now."

Your response:

"Well, your past support has meant a lot to us. Shall we keep you on the mailing list? Is it appropriate to contact you again in the future?"

Videos of Role-Play Asks

Not so good: <http://www.youtube.com/watch?v=q1v3zaPqz4k>

Better: <http://www.youtube.com/watch?v=fd6BpqMokkk>

Best: <http://www.youtube.com/watch?v=XsCgpfbVhyQ>

Questions for After the "Yes"

Once you've thanked someone for their agreement to make a gift, it's time to ask some questions that will create a personalized road map for engaging your donor and honoring their wishes. If you use it diligently it will lead to repeated (and larger) gifts.

Not every question listed is relevant for every donor or every visit. Remember that you're engaged in a conversation, not an interrogation. Capture this information and enter it in your database or other donor management system immediately.

"How would you like to fulfill your gift?"

Do you want to write a check now? Would you like us to send you a pledge statement in the mail? Are you interested in signing up for our sustainer program where you can fulfill your pledge in automatic monthly installments?

"How would you like to be recognized?"

We publish donor names in our newsletter, our annual report, and our website. We'd love to include your name so we can publicly express our thanks...and your commitment will inspire other people to give. May we list your name or would you prefer to be anonymous?

"How would you like to be kept informed about our work - and how often?"

Do you want a printed newsletter or do you prefer brief emails? Can I phone you from time to time? Are you on Facebook? Would you be open to meeting in person to receive updates -- and if so, how many times per year?

"When I come back to give you an update, would you be willing to include family members so they can learn about your support of our work?"

If you're cultivating donors for future gifts, especially planned gifts, this is an essential step.

"Who else should we be talking to about this work?"

Do you have friends or colleagues who might want to join you in supporting our work? Would you be willing to make an introduction - by phone, by email, or in person - or join me for the initial visit?

"Given your strong commitment to our work, would you consider volunteering to help us raise money?"

For example, would you be willing to come along when I meet with prospects and talk about why you give?

"What's your personal giving calendar?"

This final question requires some courage, but asking is a lot better than wading through a series of unspoken assumptions. Are you typically a once-a-year donor? Twice a year? If we have an urgent need, can we approach you again? What schedule works best for you?

Remember to have fun.

Bring your passion, commitment, and joy.

People take heart when you give them yours.