



ASSOCIATES

www.simonejoyaux.com

An orientation and training tool for your solicitors

Asking for gifts personally, face-to-face

The mantra: The right solicitor asking the right prospect/donor for the right project at the right amount at the right time in the right way.

Do you want to hear my story of the best solicitation I ever experienced...as a donor?

Fears that may prevent or postpone the ask¹. Our fears, not theirs!

1. I don't know the person's views on money.
2. I don't know how the person was raised and whether she experienced money as a positive or negative factor.
3. Prospect research shows that the person has the assets to give, but why should he give his hard-earned, invested, or inherited money to our organization?
4. I know she supports other causes; why would she support ours?
5. There are numerous groups that do similar work, so why should he support us?
6. What if she feels insulted that we asked for money?
7. What if I ask him for too much or too little?
8. I just know she is going to ask me something I don't know.
9. What if she says no and never speaks to me again?
10. In summary, the themes:
 - a. Not knowing the prospect well enough before making the ask.
 - b. Understanding why people would part with their money.
 - c. Learning what makes one's organization so special that people would elect to support it over other groups.
 - d. Knowing one's organization inside and out.
 - e. Understanding the personal nature of the ask.
 - f. Overcoming the fear of rejection.

¹ Laura Fredricks, *The Ask*, Jossey-Bass, 2006

General observations

1. Donors give *through* your organization, not *to* your organization.
2. Key messages must move the uninformed audience to understand, the dubious to believe, and the resistant to act in a particular way².
 - a. To what degree are you donor-centered?
 - b. Are you asking people to join a fight?
 - c. To what degree do you communicate impact?
 - d. How do you communicate credibility?
3. Follow this continuum of communications that you, the organization, controls: Prospects and donors need to know how / why their gift matters...its impact and the difference that the gift makes. Then that means that the gift matters. And if / because the gift matters, then the donor matters. The bottom line, the prospect / donor must feel that s/he makes a difference, matters.
4. All human decisions are triggered by emotions. Gerrod Parrott identified 133 emotions. But who can remember that many. How about the 7 top emotional triggers identified by the direct marketing industry: anger, fear, greed, guilt, flattery, exclusivity, and salvation
5. Watch and listen. See, hear, and witness: their lifestyle choices, their interests and disinterests, their values, their motivations and aspirations. All this unfolds over time.
6. Without adequate relationship building, there is no effective or successful ask.
7. When the prospect or donor is ready, delayed asking is an insult (to the them and to the cause).
8. Don't trespass on personal and professional relationships. Quid pro quo giving is offensive, a dead end, and mostly unsustainable.
9. The most significant gifts (from the prospect/donor's perspective – and that's the perspective that matters) result from the deepest alignment of values – between the prospect/donor and your organization.

Judging the prospect's readiness to be asked.

1. Treat each prospect/donor "separately and distinctly"³.
2. Communicating urgency – yours – but what about the prospect/donor's timing?
 - a. When does she feel ready to be asked, and asked for what?
 - b. It's her timeframe, not yours. Are you reading her cues about her readiness? Or are you distracted by your own fear?
3. Laura Fredricks' readiness formula:
 - a. Education + Involvement + Cultivation + Inclination + Assets = The right time to ask
 - b. Think of Fredricks' "education" as Weissman's statement, #2, "General Observations".
4. Pre-ask conversation(s) and relationship building
5. Circling back: treat each prospect "separately and distinctly."

² Jerry Weissman, *Presenting to Win*, FT Press, 2008.

³ Ibid

Essential factors every asker needs to know about the gift proposal⁴

1. Why this gift is the perfect match for this prospect (or donor)
2. The purpose of the gift
3. The benefits of the gift
4. How the gift can be funded
5. The assets the organization will accept to fund the gift
6. The timing with which the gift can be paid
7. The maximum years over which the pledge can be paid
8. The possible income, capital gains, estate, and gift tax benefits of the gift
9. Why the gift opportunity “costs” this much
10. Other donors who have made gifts at this level
11. The number of gifts the organization has received or will ask for at this amount
12. The suggested recognition that will be given for the gift

Making the ask

1. “The goal of the major gift ask is to communicate a sense of inclusion, that the prospect is part of a successful and winning team. The asker cannot speak at the prospect; the asker must speak with the prospect.”⁵
 - a. Fredricks says: “Always use *we* instead of *I* in any ask. *We* connotes that the ask is being done with all the strength and backing of the organization.” [And can the *we* always include the donor as part of the solution?]
 - b. Use *you* a lot, referring to the prospect. [That’s what Ahern and Joyaux would say.]
2. It’s about the conversation, not the case statement.
3. Asking for a major gift requires a close and trusting relationship between asker and prospect.
4. Solicitation steps⁶ [*With bracketed comments from Joyaux*]
 - a. Make the appointment. [*Tell the prospect why you wish to visit – to ask for a gift.*]
 - b. Plan the solicitation meeting carefully.
 - c. Coach the solicitation team. [*Select the right team members for each prospect. Involve volunteers when possible – but don’t use their non-participation as a reason for delay.*]
 - d. Gather and go, meet and greet.
 - e. Engage the prospect. [*In conversation and stories / telling meaningful to the prospect.*]
 - f. Say what you came to say: state the case [*And the case is about the prospect and the impact of his/her investment. The case is not centered on your organization.*]
 - g. Invite the investment. [*I like the phrase, “would you consider?”*]

⁴ Ibid

⁵ Ibid

⁶ Kay Sprinkel Grace, *Beyond Fundraising: New Strategies for Nonprofit Innovation and Investment*, John Wiley & Sons, Inc., 1997

- h. Keep the silence. *[Bite your tongue if need be!]*
 - i. Work with the prospect's answer and close. *[Responding to barriers – although it's our job to anticipate and respond to barriers earlier when possible.]*
 - j. Follow-through.
5. Essential components of the asking script⁷
- a. Time frame for the ask
 - b. Warm-up (5 minutes)
 - c. Ask (6 minutes)
 - d. Anticipated response (10 minutes)
 - e. Close and follow-up (4 minutes)
 - f. Who speaks and who listens during the ask
6. Essential components of the ask
- a. Making a compelling case for the organization and the need for support [Remember, this is about the community issue/opportunity | importance of donors and their gifts | impact of donors and their investment.
 - b. Using transitional statements that specifically reference the prospect's interest, prior support, or both
 - c. Asking for a specific amount and for a specific purpose [But what amount using a gift table or three gift level opportunities?]
 - d. Detailing the benefits of the gift [Benefits to whom? The donor, cause, and community?]
 - e. Remaining silent
 - i. Remain silent after the ask. Watch and listen to the prospect. You'll "see" her concerns. He'll let you know what he thinks.
 - ii. A "no" now doesn't mean "no" later or "no" forever.

Anticipating and overcoming barriers during the solicitation or in the follow-up. I would if I could.

1. That's way more than I can afford.
2. Why are you asking me?
3. Others need the money more than you.
4. My [life partner, children, accountant] don't think I should be giving.
5. I need to talk this over with my [life partner, children, accountant].
6. I'm not really interested in this issue / cause.
7. I don't agree with your approach.
8. *Listen and respond to the cues. How would you respond to these barriers? What other barriers do you hear? What barriers worry you the most?*

⁷ Ibid

Following up – to a yes, no, or maybe

1. Formal thank-you for the meeting
2. Respond to questions raised by the prospect/donor
3. Outline next step(s) with the prospect/donor
4. Use staff and volunteer colleagues to help with next step(s)
5. The next visit(s)

Next steps for you to move forward with this work

1. Make sure you have the right tools – but don't delay by waiting for more tools. There is the old Nike phrase, "just do it."
2. Don't wait for volunteers to identify prospects and join you on relationship building and solicitation calls. You lead. You do.
3. Evaluate your current qualified prospects. Outline the steps to get them ready to be asked. Launch those steps now. Look at your current donors. Outline the steps to deepen the relationship and move them forward to another ask.
4. Identify those who might be predisposed (that nasty "suspect" word). Get out there and talk with them. Either qualify them as prospects or leave them alone and move on.
5. Make sure your relationship-building program includes cultivation and communications. Make sure you're engaging in conversations that nurture relationships. For example, read *Keep Your Donors: The Guide to Better Communications and Stronger Relationships* to move forward in this arena. Check out Chapter 17 for ideas about relationship-building conversations and questions to ask prospects and donors. Read fundraising and donor research⁸.
6. Identify a couple reliable people and practice asking them. Then debrief and learn.
7. Some of my favorite resources:
 - www.futurefundraisingnow.com www.theagitator.net www.askingmatters.com
 - www.neurosciencemarketing.com www.aherncomm.com www.sofii.org

⁸ For example, visit the Center on Philanthropy at Indiana University, a major research center. Follow Adrian Sargeant's research. He is the foremost donor and fundraising researcher worldwide. Read his books *Building Donor Loyalty* and *Fundraising Principles and Practice*.