Coaching Staff to Ask the Right Questions To Get the Right Answers

William F. Bartolini, Ph.D., ACFRE
wbartolini@Hotmail.com
@BillBartolini

Judge a man by his questions rather than his answers.

-- Voltaire
Big gifts come from people... • who are invested in your mission, • who share your values, and • who have confidence their contribution is going to make a difference.

Asking Questions is key to developing this committed relationship.

Agenda
1. Anatomy of a Great Question
2. Assessing Generosity & Values
3. Discovery Questions
4. Types of Questions, Keeping the Convo Alive
5. Solicitations & Objections

Purpose & Intentions
Why are you having the conversation?
• To Qualify & Assess Interest?
• To Engage?
• To Solicit?
• To Steward?
• To Recruit?

The most egregious error inexperienced development officers make is to have a free-flowing conversation without a purpose.
Listen for intention, not for your response.

-- Peter Drucker

Purpose & Intentions

Anatomy of a Great Question

• Thoughtful, intentional, strategic
• Fits into the context of the current conversation (provide a transition if you need to switch the topic)
• It is open ended and can’t be answered with a Yes or No
• Asked clearly
• There is a Followup and request for more information. Remember: it’s a conversation!

Anatomy of a Great Question

• Work from the general to the specific
• Use the power of silence
• Don’t interrupt
• Avoid Yes or No Questions
• Don’t make the prospect uncomfortable by asking about information they don’t think you should know, like, on your first meeting, how their son is getting along at Harvard.
Arc of the Discovery Conversation

Donor Conversation Model
1. Tell me about your volunteer experiences
2. What are the gifts you’ve given which have meant most to you?
3. Can you recall a time when you’ve received a gift?
4. What is joyful, fulfilling and meaningful about those experiences?
5. Why you are giving to charity today.
6. What would cause you to consider a gift to our charity?
7. How do we move forward from here?

Anatomy of a Great Question

• Frame
• Question
• Followup
• Consider what the Answer revealed

Agenda
1. Anatomy of a Great Question
2. Assessing Generosity & Values
3. Discovery Questions
4. Types of Questions, Keeping the Convo Alive
5. Solicitations & Objections
Questions Assessing Generosity

- **Frame**: We are interested in the origins of generosity. How staff members, volunteers and donors think about it and teach it. How they learned to be generous.
- **Question**: May I ask about your earliest memory of giving back?
- **Follow-up Questions**:
  - How has that experience influenced you as an adult?
  - How have you taught your children?
  - How important was that experience to you?
  - How does that experience influence your philanthropy?

--- Karen Osborne

What these questions reveal:

- You’ll learn about the depth of the donor’s commitment to philanthropy. You’ll help your donor think more deeply about that commitment and tap into life-shaping memories they are passing along to children and/or grandchildren.
- You are letting your donor talk about herself in a manner that will be productive for you and pleasing to her. It gives you an easy segue to the next set of powerful questions.

--- Karen Osborne

Questions Assessing Values

- **Frame**: It sounds like something you learned from the questions above. I learned generosity in a similar manner (or whatever is true for you).
- **Question**: As you think about your philanthropy today, how would you describe the values that underpin your decisions?
- **Follow-up Questions**:
  - To what degree is that true for (the decision-makers)?
  - Which of our organizational values do you find most relevant?

--- Karen Osborne
Why Values Questions?

• Research indicates that values play a critical part in major donor decision-making.
• Most want to give where there is values alignment.
• This line of questions helps you uncover the donor’s values but also gives you opportunities to share (or remind the donor of) the values for which your organization stands.

-- Karen Osborne

Discovery Question

Questions for Discovery & Developing the Relationship

Talk with your neighbor...

What are the things we want to know to develop a deep and sustaining relationship?

Discovery Question

Discovery & Building the Relationship

• Build a complete relationship, not just one based on giving. Ask about:
• Birthdays, anniversaries, favorite flowers, names of pets, children and grandchildren.
• Get that information into the database along with the big things. Capacity, inclination, giving readiness, engagement and stewardship preferences and so forth. And think like a donor. See your organization though donors’ eyes. – Karen O
Questions for Discovery & Developing the Relationship

Talk with your neighbor...

What are the Questions we could ask to discover the answers?

“Sometimes I think the funds are wasted.”
“Wasted?”
“I’m not sure I should support this.” “Not sure?”
I’m rather tapped out right now.” “Tapped out?”
“Not sure I know enough.” “Know enough?”

Echo Questions

• “Tell me more...”
• “Go on...”
• “Explain that to me...”
• “Fascinating...”
• “Oh really...”
• “Hmmm...”
Futures Invention Questions

It’s 10 years in the future and...
- “What are you/we known for?”
- “What are you proudest of?”
- “What would your/our headline be?”
- “What is your personal legacy?”
- “What would be in your obituary?”

Legacy Questions

Frank Sesno asked his mother: “What should I do with your ashes?”

“Scatter me to the wind or take me to Paris.”

Legacy Questions

- “What’s one story you’d like me to tell my grandchildren about you?”
- “What are you proudest of in life?”
- “What is meaningful to you?”
- “What brings you meaning at this time in your life?”
- “What knowledge do you want me to pass along?”
Legacy Questions

- What is your picture of yourself?
- How far out of integrity are you with your vision of who you said you were going to be?
- Where do you want to be with yourself?
- What would you do if you knew you could not fail?

Stupid Questions

1. Asked from willful ignorance or laziness
2. Hurtful that humiliate and open wounds
3. Questions meant to embarrass
4. Inappropriate personal questions.

-- Frank Sesno

Keeping the Conversation Going

“Did I hear you say...”
“Could you go a bit deeper into that?”
“Why do you feel that way?”
“What kinds of information would change your mind?”
“Why doesn’t our organization fall into your priorities?”
Affirm and Acknowledge their responses.

Micro-affirmations: nods, uh-huhs
• “That’s really interesting”
• “I hadn’t thought about it that way.”
• “That’s a good point.”

1. Ask Them Questions
   • What do you want to accomplish?
   • What do you need to learn?
   • What questions will you ask?

2. Role Model Frame, Question, Followup

3. Expand the Types of Questions They Use

Coaching Staff

Solicitation Questions

Asking for a Gift: The Pre-Ask

Ask the prospect for permission. Most donors are a little surprised – and pleased. It recognizes the dignity of their giving and our partnership.

• Ask for permission to Ask
• Ask if this is the right time to Ask
• Ask if this is the right project for them
• Ask how to Ask
• Ask who should ask
Solicitation Questions

Ways to Ask

1. Be direct: “Mrs. Schultz, would you please consider a gift of $5,000 to enroll more students in this school?”

2. Stress the Benefits: “Mr. Washington, by getting children off the streets and into this after school program, we can reduce juvenile delinquency by 50%. Will you make that possible this summer for 25 kids with a gift of $15,000?”

Solicitation Questions

Ways to Ask

1. Join the Bandwagon: “Ms. Grant, five of our board members are making gifts of at least $1,500 each to provide services to these seniors. Will you please join them with a gift of $1,500 or more?”

2. Appeal to their legacy: “Mr. Jefferson, you’ve had a tremendous impact you on this organization over the years. I’d like to ask you to cement your legacy with a gift so we can put your name on the Jefferson Scholarship in perpetuity. Naming the Jefferson Scholarship is important – but more importantly is the fact that you will be helping generations and generations of these kids. Would you consider a $2.5M gift to do that?”

Objection Questions

Zig Ziglar Loves Objections

Objections show interest

- Many sales trainers refer to objections as the beginning of the sales process. Objections show the donor is interacting with what you say.
- Objections become much easier if you see them as the prospect asking for your help on how to make the gift.
Anticipate Objections

- The Ask is too high
- Fear that assets are insufficient
- Wrong Ask (or project)
- Disagreement with the organization
- Need more time
- Need to discuss with others
- More comfortable giving a smaller amount

Before responding:
- Question
- Probe
- Restate

My friend Jill Pranger (Jill@PrangerPhilanthropic.com) says prospects will have 4 potential concerns...
- Amount, Area, Timing, or Asset

For a wealth of information on powerful questions, see www.TheOsborneGroup.com