Exercising Your Ask Muscle

Guy Mallabone, MA, CFRE

Nov 26, 2019
09:00 – 10:30 am
Toronto, Canada
Session Description

This session is designed to:

• Review barriers to asking;
• Provide a strategic overview of gift solicitation;
• Review the elements that influence a gift decision;
• Examine the psychology of a successful ask and the secrets to success; and
• Provide opportunity to practice your ‘ask muscle’ in solicitation role play.
# Manage the Barriers to Asking

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A few introductory words about Major Gift Solicitation

- Where the ‘rubber hits the road’ …
- Natural progression of relationship management
- Asking is part of the process … doesn’t exist by itself
- Need to think like “Opportunity Offerers”
- Our role is to ask, negotiate questions and close
Remember the Donor Centric Pledge
(Simone Joyaux and Tom Ahern)

“We waste the potential for mission delivery when donors are not asked for a gift”
When is it time to Ask?

1. Amount
2. Timing
3. Project
4. Who’s Asking
5. Who’s Being Asked
General Solicitation Guidelines

- Must be coordinated (relationship manager?)
- Traffic Control (no independent approaches)
- Roles & responsibilities should be known
Different Hats in the Room

- Influencer
- Expert witness
- Asker
- Staff support
Elements Influencing a Decision to Donate

- Is this a worthy case? (urgent and compelling?)
- Is the case being delivered with believable passion?
- Is the organization competent and ready for my gift?
- Do I have confidence in the leadership?
- Do I feel part of this story?
- Have they had past successes?
- Am I being asked by the right person, at the right time, for the right amount?
- Is the information provided to me complete?
Thinking Like an Investor

• Integrity
  • Is the organization fiscally sound?

• Readiness
  • Does the organization have adequate plans for my money?

• Credibility
  • Is the organization’s leadership trustworthy and can they accomplish what they claim?

• Relevance
  • Does my gift fulfill serious needs that benefit the organization and its mission?

• Urgency
  • Does the organization have an urgent need for my money?

• Scope
  • Is the need greater than what my gift can satisfy?
Psychology of a Successful Ask

- Relax
- Leave the ego on the doorstep
- **You are not begging or asking for a ‘hand out’**
- You are talking to someone you who likely has an interest in what we are doing
- Enjoy the process (opportunity offerer)
- Your role is to help people see how they can make important projects happen
- Be ready to handle objections or questions
- No matter the outcome, you have taken an important step in strengthening the relationship between the prospect and your organization and the mission
PREPARATION FOR THE VISIT

• Understand the case
• Know your prospect
• Know what you’re going to say
FIVE PARTS TO A SUCCESSFUL VISIT

1. Casual conversation—“small talk”
2. Present need and case for the campaign
3. Request the specific gift
4. Listen and handle prospect’s response
5. Follow-up and closure
Secrets to Success

• Maintain positive attitude
• Understand your role … to “ask”
• Be prepared - self motivation and preparation are the life-blood of good solicitation
• Strive to establish rapport and confidence
• Master the Case
• Be sincere
• Sell the IMPACT, not the means
• Ask for the gift
• When you make a promise - keep it
• After you ask for the gift - honour the silence!
• Conduct each solicitation passionately
Receive the Response

Up until this point, you controlled the agenda, now it is time for you to sit back and LISTEN.

Ancient Chinese Fund Raising Proverb: “He who speaks first loses.”
YES!

THANK YOU

COMPLETE THE Letter of Intent
NO

ASK WHY

IS IT SOMETHING THEY DON’T UNDERSTAND?

Second Chinese Fund Raising Proverb:
“Always Leave Open the Possibility of a Gift in the Future.”
OFFERS A LESSER AMOUNT

If you believe it is the best possible pledge, accept the gift.

If not, treat as if they need more time.

Is this a Token Gift or their best??
NEED TIME TO THINK

Great .. It’s not a rejection!

Is there more information required?

Is there someone else that you can present to?

Schedule follow-up appointment
Major Gift Solicitation - PREPARATION
Major Gift Solicitation – ROLE PLAY
Role Playing

Person #1: Asker
Person #2: Prospect
Person #3: Observer
Debrief on Role Play

• How did you feel as the person doing the asking?
• How did you feel as the person being asked?
• What were the key observations and things you would want to ‘tighten’ up before doing this for real?
Minutes Remaining
6
Minutes Remaining

5
Minutes Remaining

4
Minutes Remaining

3
Minutes Remaining

2
Minutes Remaining

1
Minutes Remaining

0
Thank You

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