

# Exercising Your Ask Muscle

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



GLOBAL  
PHILANTHROPIC™  
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.



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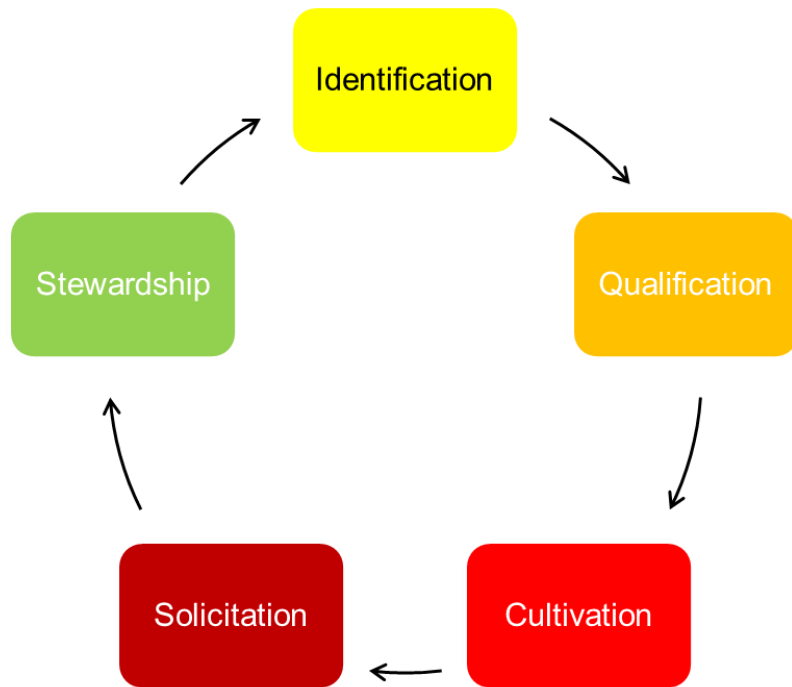
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Distractions	<b>Distractions</b> are a form of procrastination; distractions are a 'flag' to remind you of what you are trying to accomplish – then focus

# 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

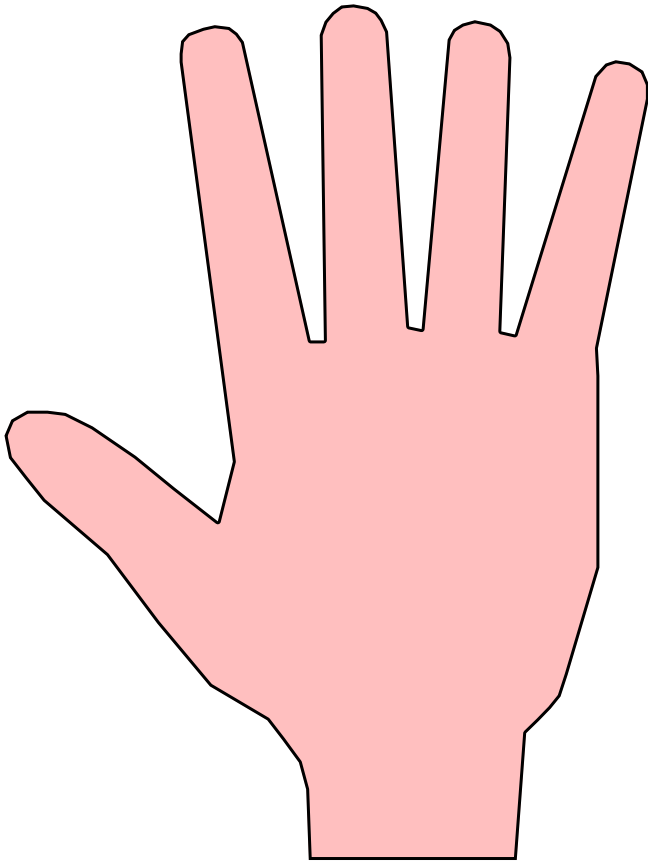
- Relax
- Leave the ego on the doorstep
- **You are not begging or asking for a 'hand out'**
- You are talking to someone you who likely has an interest in what we are doing
- Enjoy the process (opportunity offerer)
- Your role is to help people see how they can make important projects happen
- Be ready 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

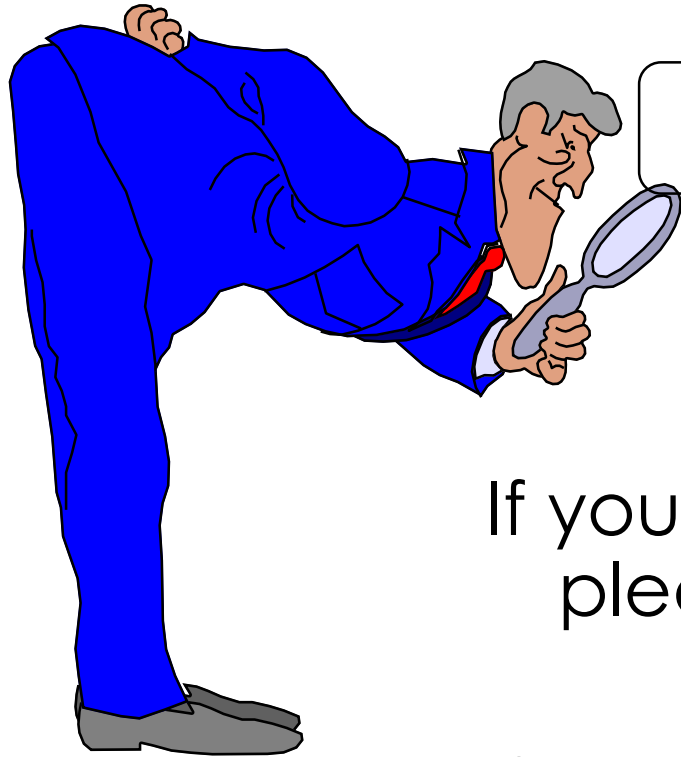
## ASK WHY

## 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



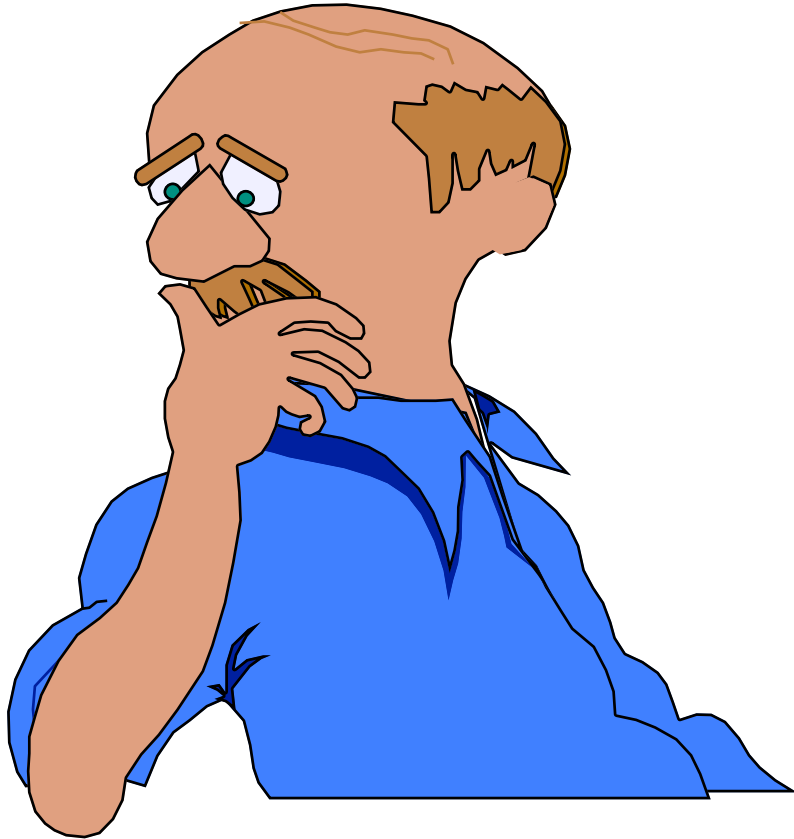
*Is this a Token Gift or their best ??*

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

If not, treat as if they need more time.



# NEED TIME TO THINK



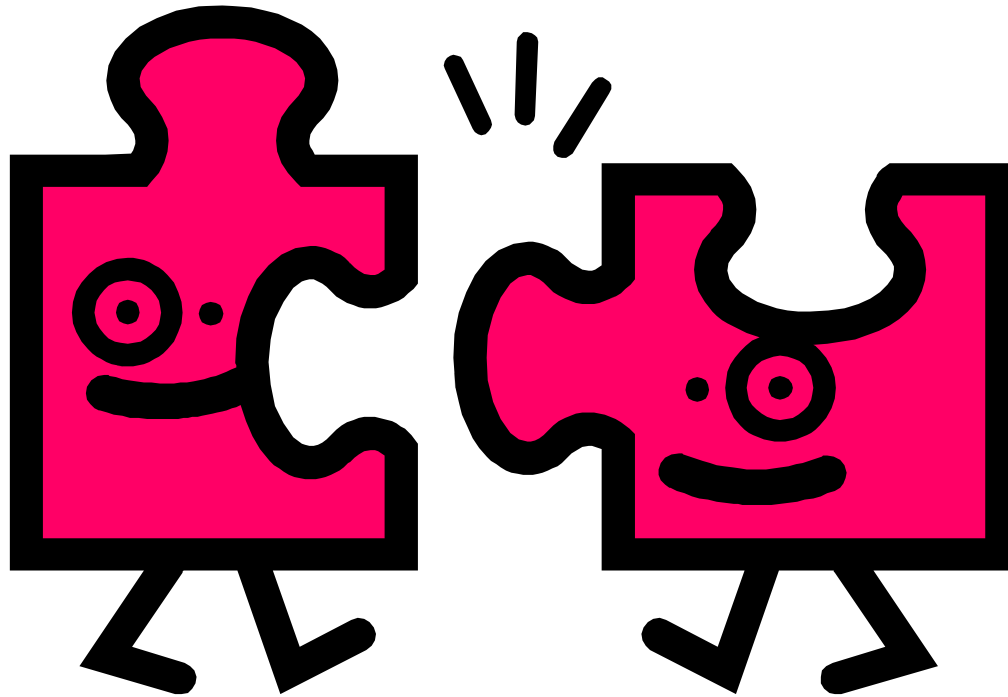
Great .. It's not a rejection!

Is there more information required?

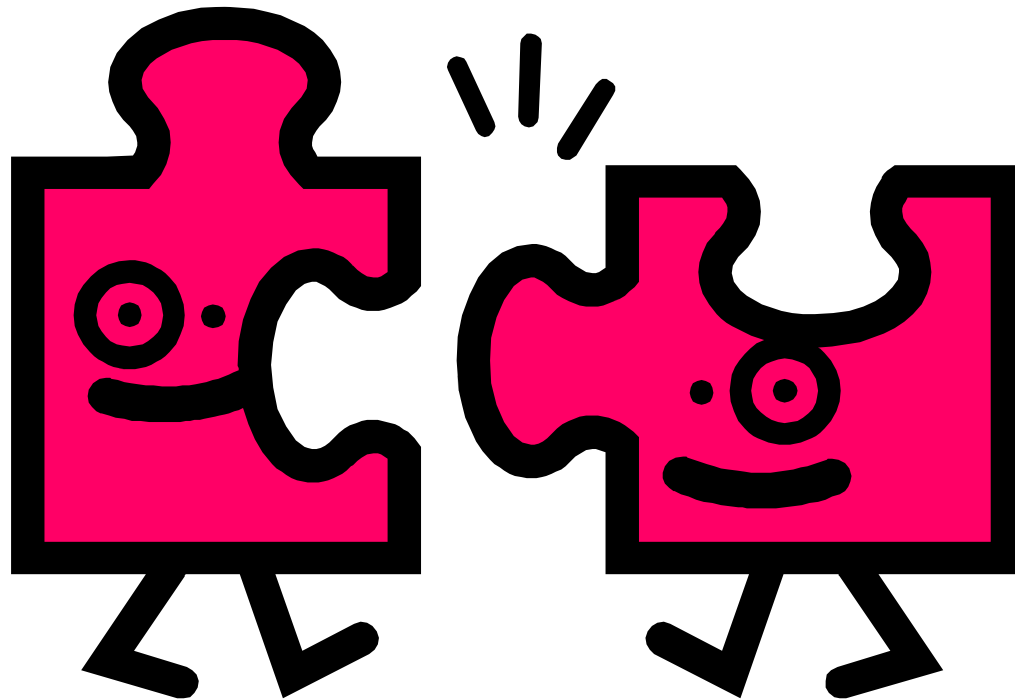
Is there someone else that you can present to?

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



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# Minutes Remaining

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