

GETTING TO YES: FROM CULTIVATING TO CLOSING

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TODAY'S SESSION

- Key Concepts of MG Fundraising
- Know Thyself....and Your Cause
- Cultivate, Cultivate, Cultivate
- Get the Appointment
- Ask, Negotiate, Close
- Objections
- Case Studies and Simulations

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KEY CONCEPTS OF MAJOR GIFT FUNDRAISING

Major Gifts vs. Annual Gifts

A Brief Clarification

- Frequency of gift
 - One-time vs. annual
- Solicitation technique
 - Face-to-face vs. letter/call
- Solicitation sequence
 - Multiple vs. single event
- Source of funds
 - Appreciated capital vs. current cash flow
- Timing
 - Donor driven vs. cyclical/deadline driven
- Ask Source
 - Team vs. single volunteer or staff

THE SEVEN STEP MODEL

- 1. IDENTIFY the Prospect
- 2. RESEARCH and Evaluate
- 3. PLAN approach Strategy
- 4. INVOLVE the Prospect
- 5. ASK for the Gift
- 6. NEGOTIATE the Agreement
- 7. NURTURE the Donor

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KNOW THYSELF.....AND YOUR CAUSE

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WHAT'S HOLDING YOU BACK?

- FOR MOST OF US, IT'S FEAR:
- personal rejection
- professional failure
- breaking cultural taboos
- exposing your ignorance
- getting an inappropriate response

YOU CAN OVERCOME THESE FEARS

- BE PREPARED!!!
- Research
- Strategy
- Materials
- Team
- Put yourself in control of the situation

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WHAT ARE YOUR BELIEFS?

- about Fundraising?
- about your Prospects?
- about your Organization?

CULTIVATE
CULTIVATE
CULTIVATE

(AND BY THE WAY? CULTIVATE!)

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CULTIVATION

- Major Gifts almost never come from one or
- just a few meetings:
- Work often through research and strategic planning process
- involve a number of encounters over time
- Almost always involve person-to-person team approach
- Is usually with more than one person, not all at the same time
- needs combination of: (a) chief executive/project champion (b) volunteer leader (c) professional fundraiser

CULTIVATION

- Donor centered
- Tailored to each individual person
- Blend of personal, telephone and written communications
- Planned, regular sequence of activities
- Continuity important

CULTIVATING PROSPECT INTEREST

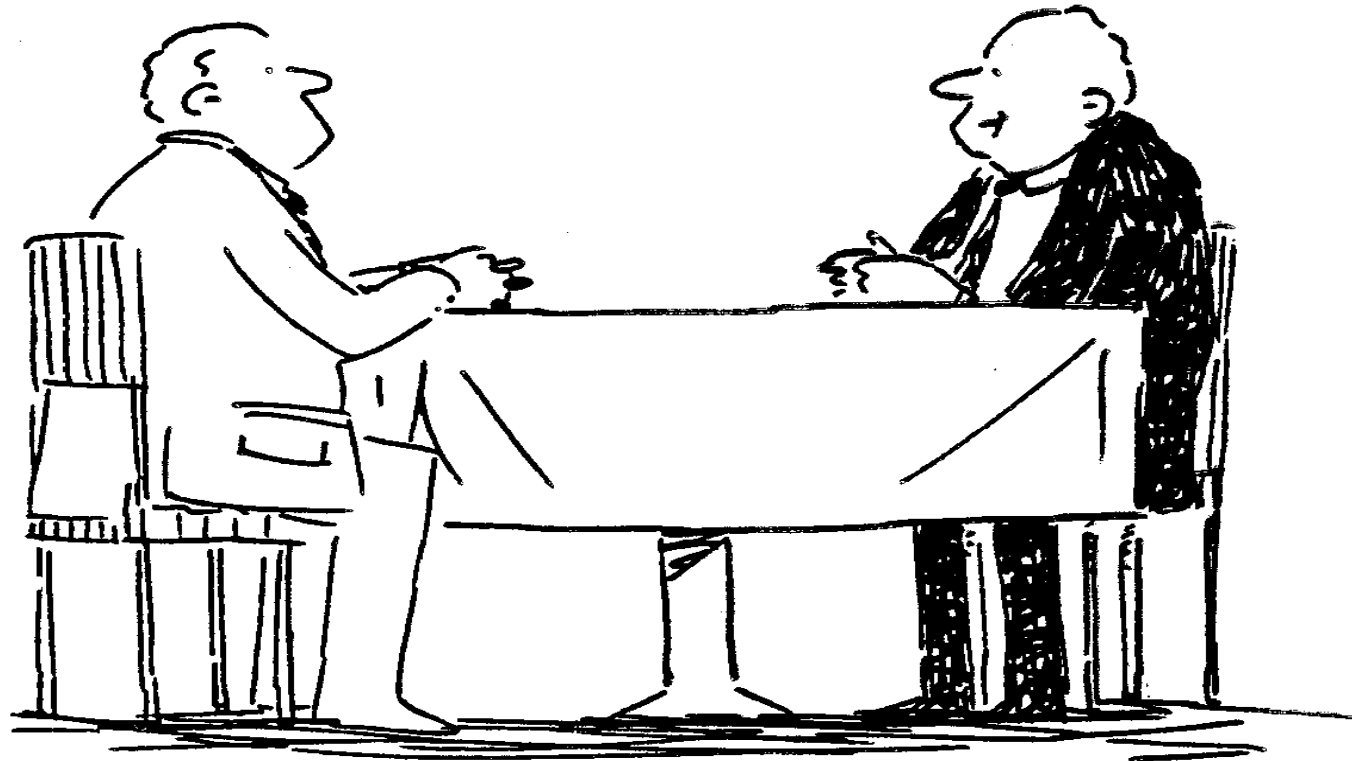
- Prospects build their cultivation “score” through engagement and involvement with the organization and the project:
- Broadcast communications (Newsletters, etc.)
- Special group activities
- Information meetings
- One-on-one meetings (site tours, mtgs w/staff)
- Volunteering

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CULTIVATING PROSPECT INTEREST

- Know what steps have been taken as you prepare to ask for a gift
- No prospect is ever perfectly or completely cultivated
- Sometimes you just have to ask because the time has come



“Well this is crazy. Every time we talk about likely donors for the project, it sounds like me.”

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REMEMBER WHY DONORS GIVE

Donors give to causes that:

- Offer reciprocation
- Show benefit
- Add value
- Make changes for the better
- *For themselves & their families*
- *For their organization*
- *For their region or country*
- *For their beliefs*
- *For the world*

CULTIVATE PROSPECT ENGAGEMENT

Ways to involve major donors

Social gatherings

Hold meetings with success stories

Orientations

Ask them to join the Board or a
Committee

Send publicity
clippings

Invite them to a lecture

Special events

Invite them to be on a panel

Ask them for advice

Call them regularly to provide
updates

Ask them to volunteer

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PEOPLE SUPPORT
WHAT THEY HELP
TO CREATE

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IS THIS ABOUT MONEY?

- “In the end, you may wish to provide financial support for this project. However, right now, I would just like to tell you more about it and see if you have any observations or suggestions that could help us as we plan and develop the initiative.”

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GETTING THE APPOINTMENT

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SETTING UP THE ASK MEETING

1. Before the meeting:
2. Do your homework
3. Be prepared
4. Understand the Needs of the Prospect
5. Match the Prospect's Needs to the Benefits your institution has to offer
6. Have briefing materials
7. Gather your team
8. Practice, if necessary

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GETTING THE MEETING

- Letter followed by phone call OR just a phone call, perhaps after a “chance” meeting
- **Be forthright:**
 - *You’ve been a long time supporter of....*
 - *You’ve been so involved in....*
 - *I’d like to talk to you about an important project*

GETTING THE MEETING

- You'll probably end up asking for the date on the phone

DANGER:

You can get trapped into doing your ask on the phone....DON'T.....

- *You'll get a smaller gift than otherwise*
- *You won't get a gift at all*

THE CORE OF THE PROSPECT MEETING

1. Greet the Prospect (make time for idiosyncratic chatter)
2. Introduce your organization/program/project and explain your role
3. Explain why this meeting is taking place
4. Talk about the need and the prospect's interest/involvement (make the match)
5. Ask for the Gift OR Ask for agreement to go to next stage
6. BE SILENT
7. React to questions and/or objections
8. Agree any process of negotiation
9. Add any special requests and/or invitations
10. Repeat what the prospect has agreed
11. Say farewell

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ASKING, NEGOTIATING & CLOSING

**IF YOU WANT
MONEY...ASK FOR
ADVICE!**

**IF YOU WANT
ADVICE...ASK FOR
MONEY!**

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THE OPENING CONVERSATION

- *Understand the Prospect's Needs*
- *Motivation?*
- *Interests?*
- *Ambitions?*
- *Experience with your organization?*
- *Likes?*
- *Dislikes?*

ASK PROBING QUESTIONS

This is a conversation, not an interview

Ask for their advice

What do they think about your organization?

Its place in the community?

How are they involved with you?

Use Open-ended questions

Who? What? Where? When? Why? How?

Get them talking

Avoid Closed questions

“Do you?” or “Are you?” or “Have you....?”

**Use the meeting as Person-to-Person prospect research.
It's your chance to find out what makes the Prospect tick!**

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MAKING THE ASK: THE WARM UP

- **Shift the conversation to your organization**
 - Their most recent engagement in your organization
 - Recent or new programs and activities
 - Continue to ask probing questions
 - Find out what motivates their interest
 - Think like a litigator
 - Don't ask a question whose answer you don't know
 - » Rely on research, prep and your "theory"
 - Ask questions that will lead the discussion where you want to go

WAYS OF EXPLORING INTERESTS

- Examples of probing questions:
- *“Who was the greatest influence on your love of *****?”*
- *“What aspects of *****’s work interest you most?”*
- *“Where did you used to live in ***** when you were *****?”*
- *“When did you last visit ***** ?”*
- *“Why did you start collecting ***** memorabilia?”*
- *“How good has our organization been in keeping in touch with you?”*

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PREPARING TO MAKE THE ASK

- Know how much to ask for
- Have a “theory” about what will interest the prospect
 - Their passion points
 - Area of interest for “investment”
- *NOTE:*
- *Giving interest isn't always (or just) mission-based*

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MAKING THE ASK: THE REAL DEAL

- Transition the discussion to the purpose of the Ask
 - The vision it is helping to fulfill
 - The ways it links with the prospect's interests
- Put the prospect in the picture
 - Your support for XXX can make it happen
 - We'd like you to consider a gift of \$XXX for these purposes
 - Name that number and say it with conviction
 - THEN BE SILENT
 - What you hear next will be the best information about closing the ask you will ever get

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WHAT HAPPENS WHEN THE PROSPECT RESPONDS?

- Listen, make “Attention Signs” (nod in agreement, say “yes”)
- Maintain eye contact while noting down Key Words:
- his needs, problems, questions, concerns
- Use these Key Words to repeat back your understanding
- Briefly prompt to get more information, but now is not the best time to reply to each concern

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EMPHASIZE THE BENEFITS

- Show donors how their gift can add value:
- “How many extra ***** will be able to make a decision about taking up a ***** career through the *****’s program?”
- “What effect will new facilities have on the quality of the ***** experience?”
- “What will be the long term effect of this ***** program on....?”

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CONFIRMING

- If you can get Confirmation, you need never fear Asking for the Gift!
- Once the Prospect has confirmed your organization is addressing his concerns and doing good things:
- it does not mean that the Prospect will actually give
- BUT
- it does mean that there is no reason not to Ask him for a Gift

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CONFIRM YOUR UNDERSTANDING

- **NOW use Assumptive Statements and Closed Questions**
- **to find out if the Prospect will Confirm agreement**
- **with your program:**
 - *“So you would agree that...?”*
 - *“If I could just sum up what I understand you feel about the program....”*
 - *“Just to clarify, do you feel happy with....?”*
 - *“Do you think we are going about this the right way?”*

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THE GIVING SIGNAL

- *“So how much do you want from me?”*
- *This is definite Confirmation, go straight into the Close*
- *But BEWARE getting a Giving Signal too early in the meeting!*
- *It may allow prospect to deliberately undergive*
- *It may not give you sufficient time to learn enough about their Needs for you to maximize the Ask*
- *So...*
- *Thank for support, but ask to discuss the details later.*
- *Continue by asking about motivations – to help you decide whether Gift level is right or if you should try for more*

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CULMINATION OF THE GIFT ASKING PROCESS

*“Asking can be the start of negotiating,
but if you don’t ask, you will never
negotiate!”*

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WAYS OF CLOSING

Here are examples of a Closing Statement/Question:

- *“Would you consider raising the level of your support for this program to \$X?”*
- *“Others interested in this project are supporting us at this level”*
- *“We are looking for \$X to secure this project’s future”*
- *“Other benefactors interested in the project have come on board in the range of \$X to \$Y”*
- *“Have you considered financially supporting ...?”*

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AND WHAT HAPPENS AFTER YOU ASK?

- **Stay Silent: He who speaks first, loses!**
- **The Prospect is thinking about your proposition**
- **Look her in the eye, expectantly but patiently!**
- **Do not interrupt his silence through your own nervousness**
- **This is the Prospect's decision - let the Prospect make it**

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NEGOTIATING RARELY TAKES PLACE IN THE GIFT ASKING MEETING ITSELF

- Can take far longer than asking for the gift itself –
- many fiscal, legal and personal issues to address
- Start with making a concrete proposal to begin the process of negotiating the gift
- Find out what is needed to negotiate the gift,
- what the new donor (no longer a prospect) wants:
 - Details of the project?
 - Payment arrangements?
 - Donor Recognition decisions?
 - Tax planning?
 - Spouse/partner involvement?

HANDLING OBJECTIONS

Prospect Attitudes & Judgments

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PROSPECT ATTITUDES & JUDGMENTS

- **Misunderstanding**
- **Indifference**
- **Skepticism**
- **Smokescreen Objections**
- **Engaging Objections**
- **Deal Breakers**

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WHAT IF THE PROSPECT OBJECTS?

- See this 'objection' as something positive
- It is the first stage in Getting to Yes
- It is a positive part of the process of creating agreement and creating a real partnership
 - Don't run away from it!
 - Repeat back the Prospect's concern to confirm what he/she means
 - An objection means the Prospect is engaged with your discussion - and awake!
 - Enjoy the discussion. It's an opportunity to involve the prospect by working through their objections

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DEALING WITH OBJECTIONS

- Do not take them personally
- Do not believe objections mean “no”
- Objections are a way to make up our minds
- Most objections are A GOOD THING in asking
 - Prospect is carefully listening and giving serious feedback
 - Prospect is usually telling you what you have to deal with to get a gift

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TOPICS FOR OBJECTIONS

- The people at your organization
- My experience at your organization
- The organization's status vis a vis other similar organizations
- The mission or campaign objective
- The gift purpose
- I don't like naming...
- I'm not really interested in buildings...
- Timing and gift competition
- Everyone has their hand out. . .
- Our assets have depleted significantly. . .

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CLOSING

- CLOSING QUESTIONS:
- *“Are you in a position to decide at this time?”*
- *“Would you like to bring your spouse/partner to see the program?”*
- *“What further information do you need?”*
- *“Can I introduce you to the chief **** involved?”*
- *“Would you like to think about the opportunities for having your name on the program?”*



FAILURE TO CLOSE

We fail to close asks because:

- We never actually ask for an amount
- We avoid testing or checking for closure
- We are afraid of being turned down
- We fail to identify prospect's needs during initial steps of the solicitation
- We fail to summarize progress from earlier stages

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BUT WHATEVER YOU SAY

- Never mind how cleverly you phrase it
.....
- Never mind how clumsily you blurt it
out

NO ASK = NO GIFT!

**The main reason people don't give
is because they are not asked!**

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CASE STUDIES & SIMULATIONS

- I HEAR.....AND I FORGET
- I SEE.....AND I REMEMBER
- I DO.....AND I UNDERSTAND

~ Confucius

Thank you and Questions?

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