Ask Without Fear!

Connecting donors with what matters to them most…and fully fund your cause!

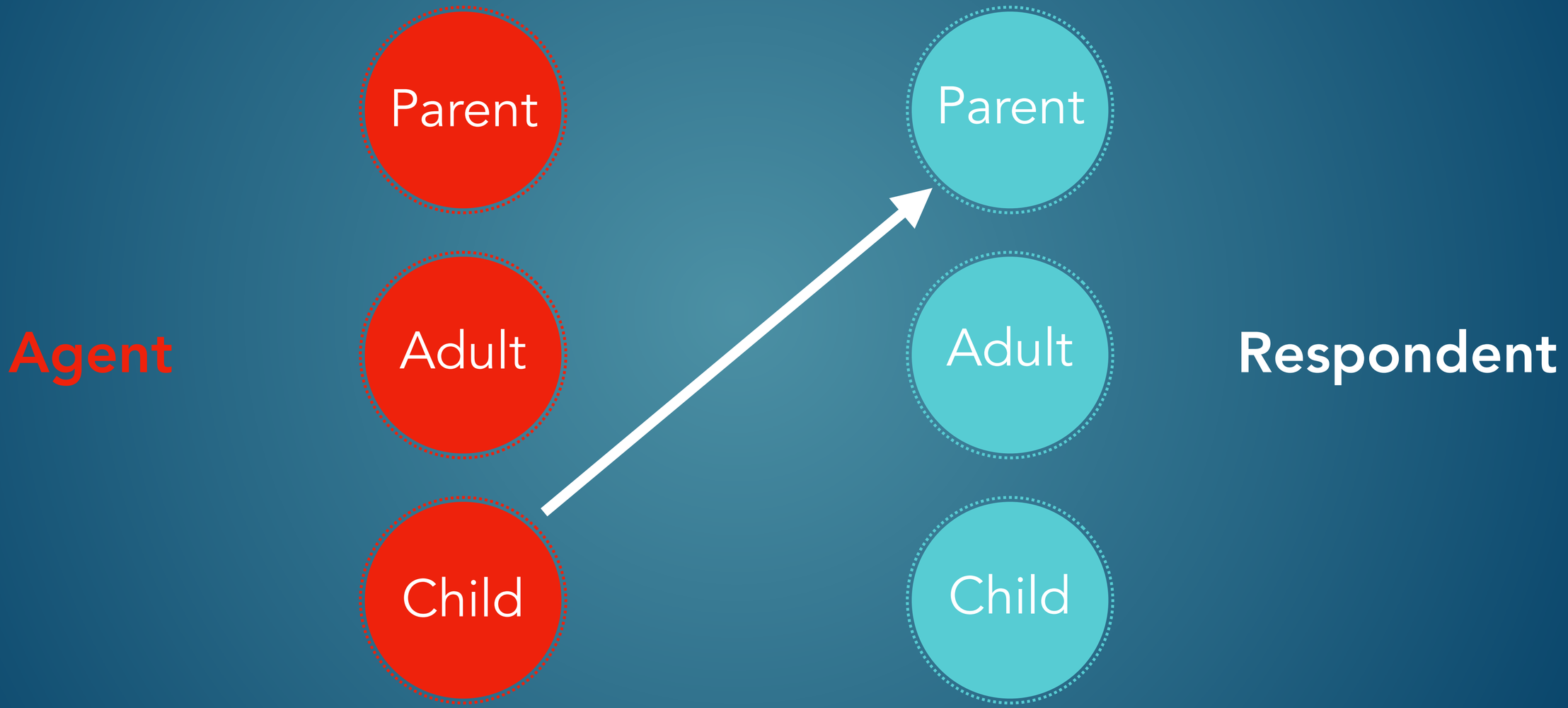
Marc A. Pitman, **CEO**

@marcapitman | @concordleaders

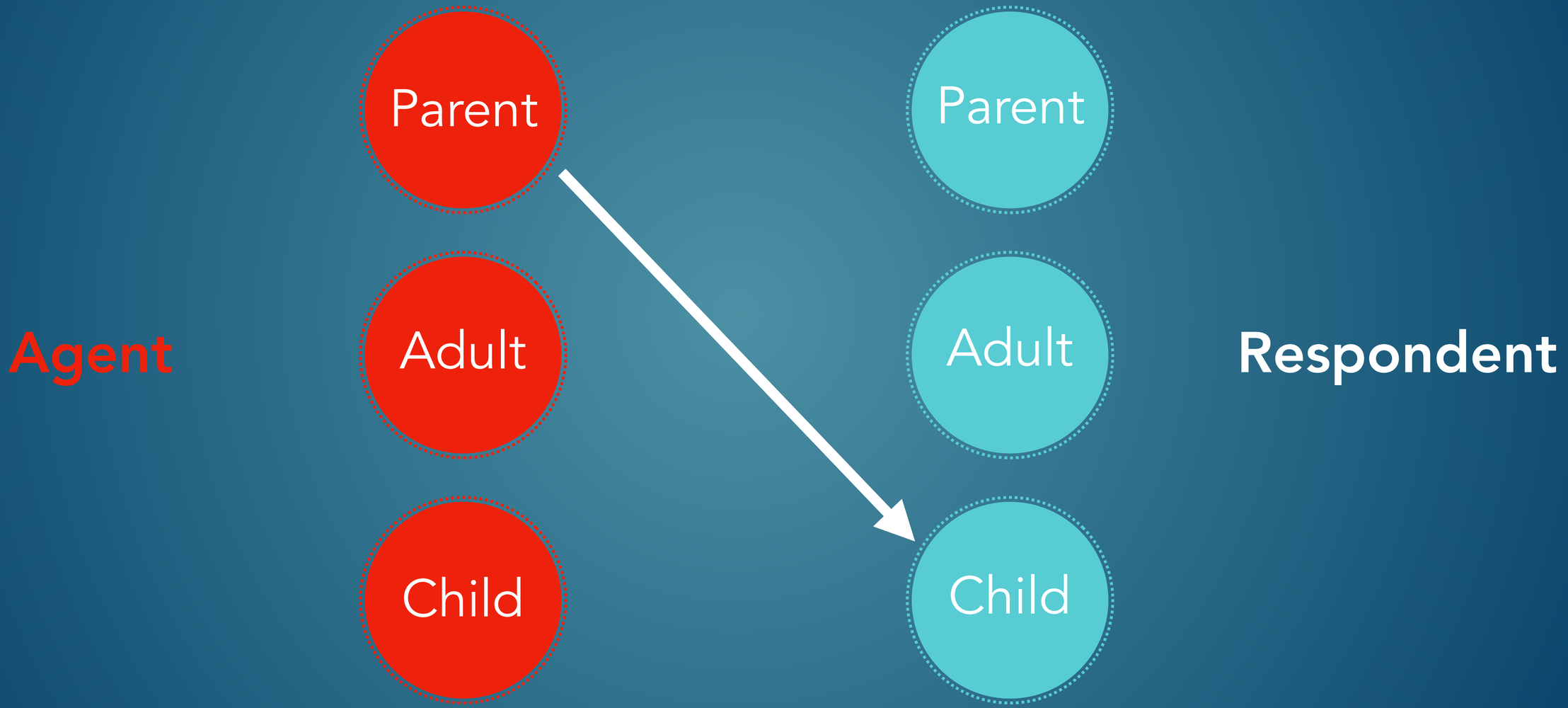
ConcordLeadershipGroup.com

CONCORD
Leadership Group

Talking **Adult** to **Adult**



Talking **Adult** to **Adult**



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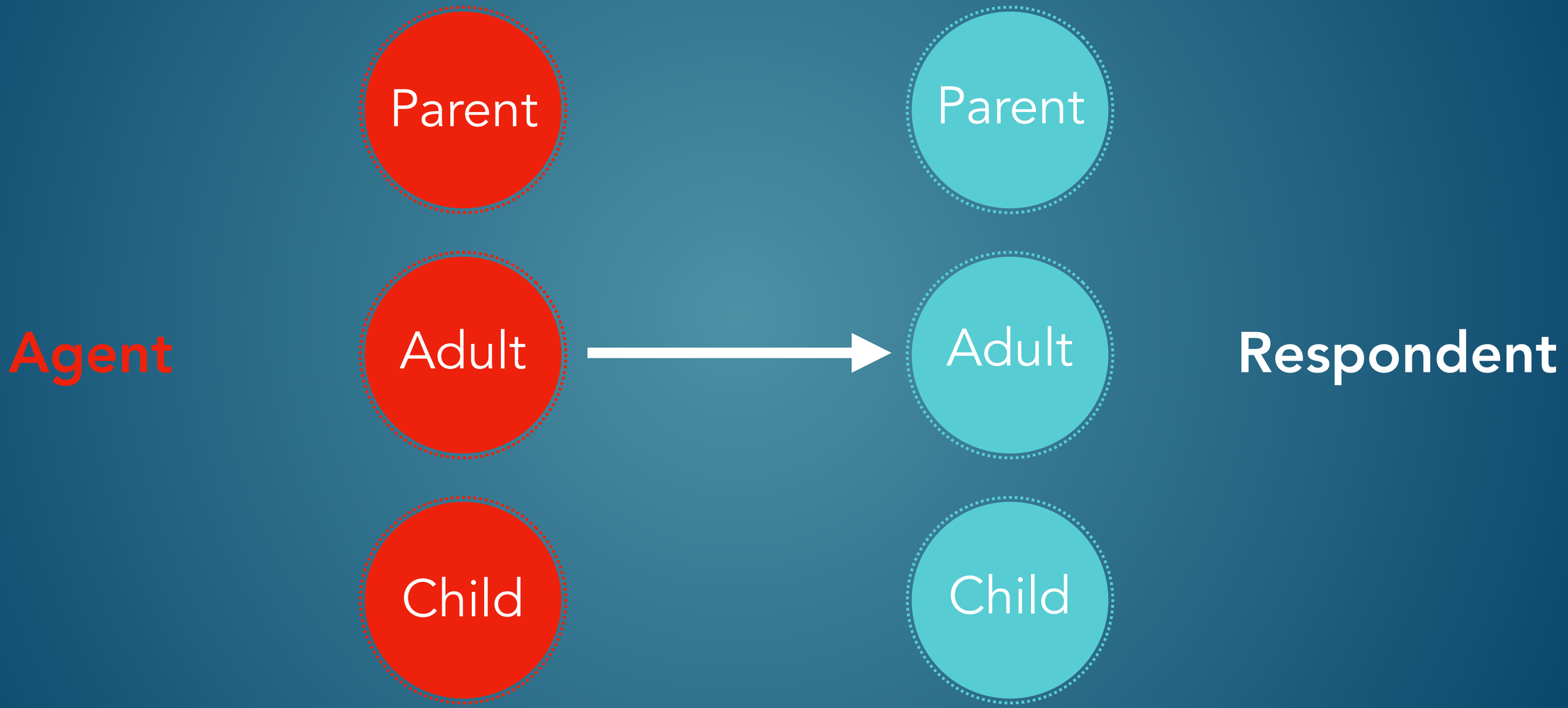

Fundraising…**a privilege**

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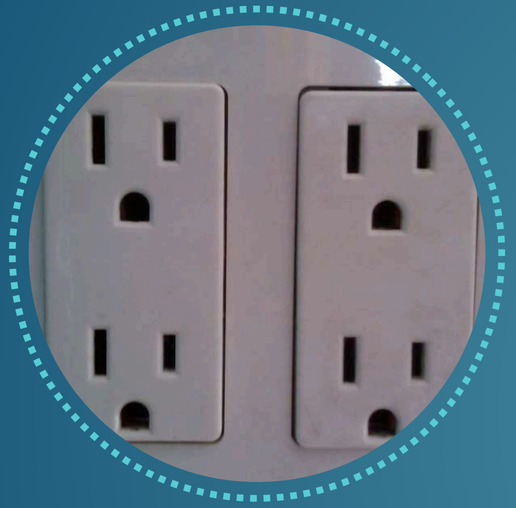
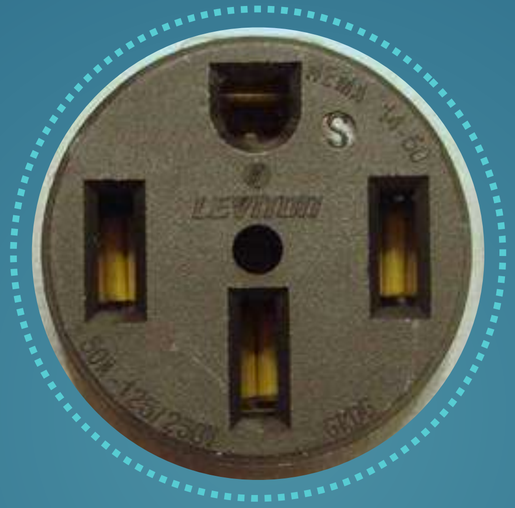




Fundraising…**a privilege**

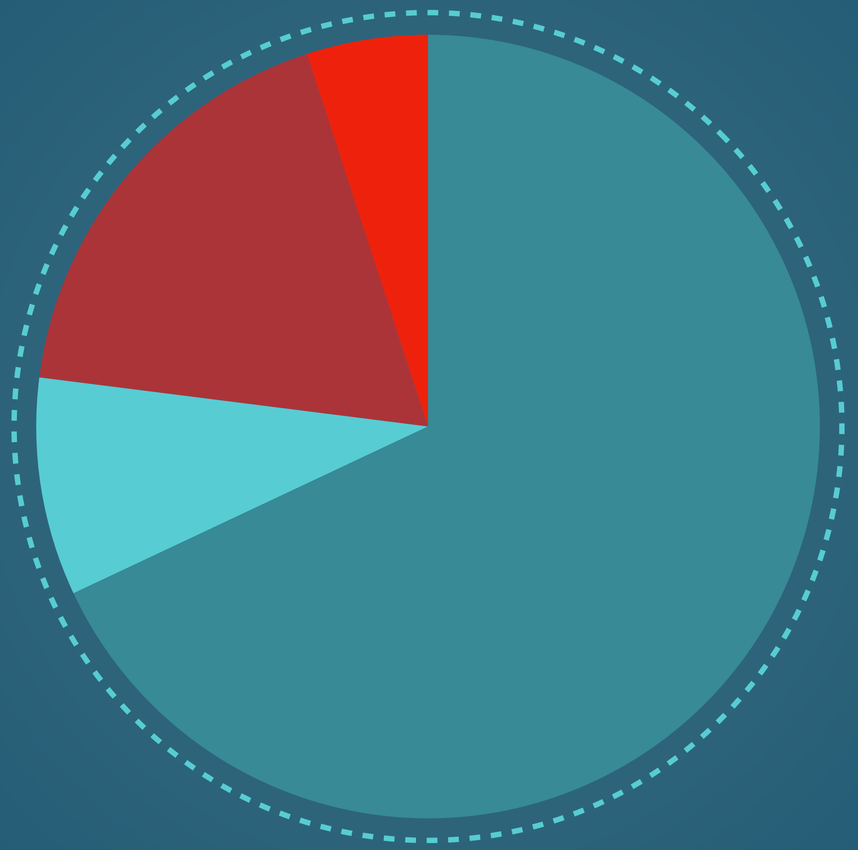
• Money Messages? •

• Money Messages? •

What were the messages you heard about money as you were growing up?

(Or even hear now?)

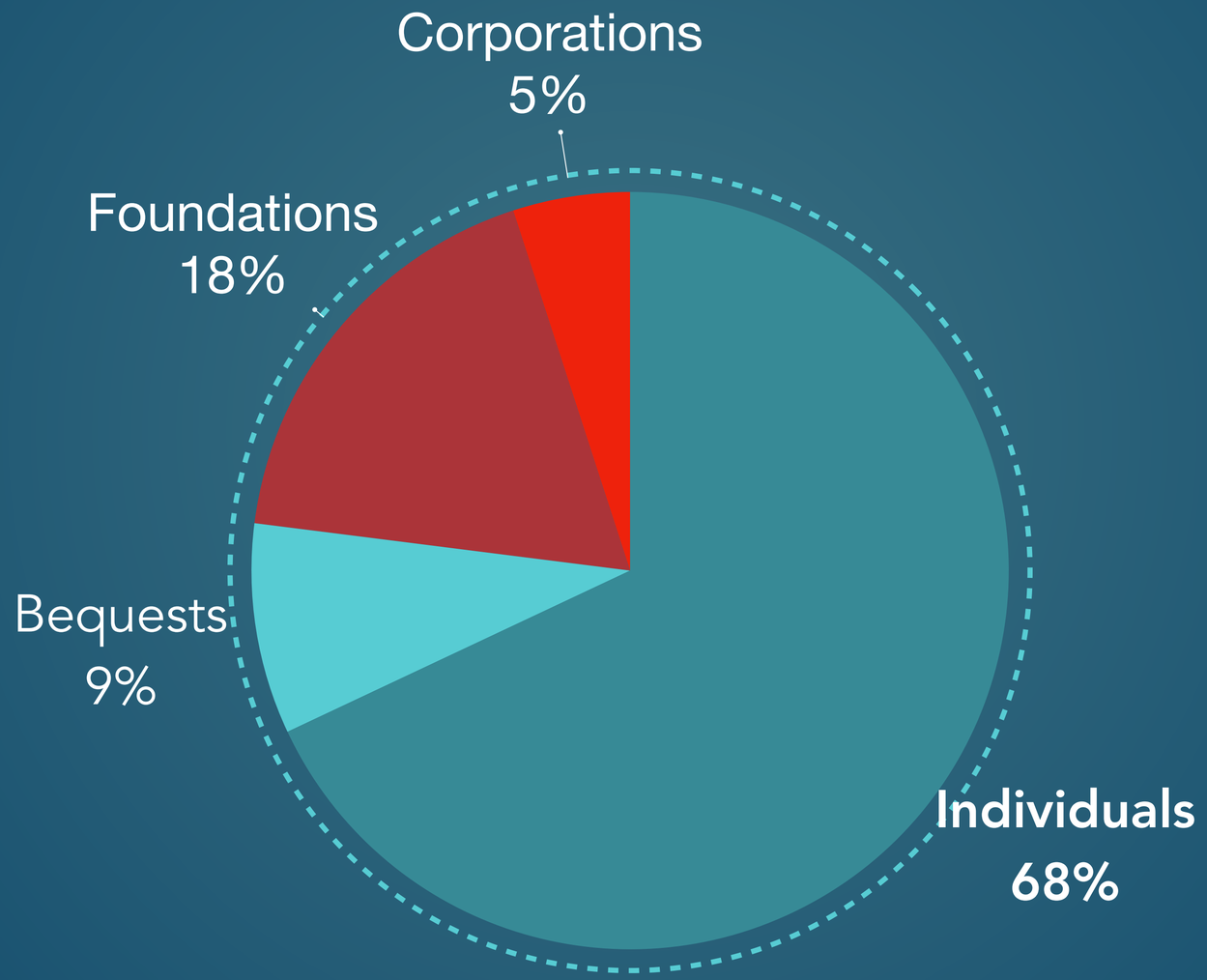
3 Income Sources



Corporations
Foundations
Individuals
Bequests

Total Given in 2018: $427.71 Billion

3 **Income Sources**



3 **Income Sources**

So where should **77%**
of your time be focused?

*Or really **85%** since half of*
“Foundation” giving is from family foundations

- **Mistakes** - often our best teacher -

White Cheddar
REDUCED FAT
Snack Mix
DOUBLE CHEESE
NEW!
CHEEZ-IT
Hot & Spicy
5g WHOLE GRAIN
New
Zingz
CHIPOTLE CHEDDAR
QUESO FUNDIDO
BIG
Monterey Jack
Big Taste
Real Savings Every Day
2/$5.00
DUOZ
Cheddar Jack
Mozzarella
PROVOLONE
COLBY
Baby Swiss
SCRABBLE JUNIOR
REDUCED FAT
White Cheddar

Cheez-It Treatment – **Our Way**

• Would you give: •

Cheez-It Treatment – **Our Way**

• Would you give: •

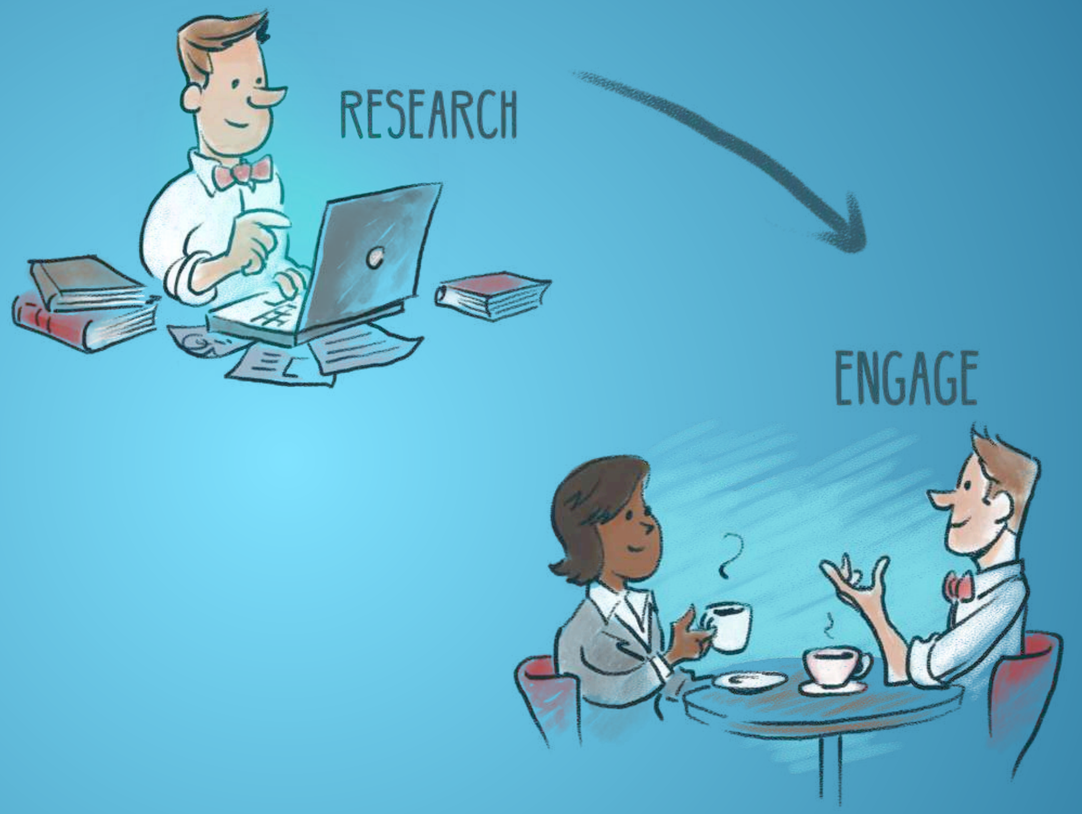
[ ] $5 [ ] $10 [ ] $25 [ ] $50 [ ] $75
[ ] $100 [ ] $250 [ ] $500 [ ] $750
[ ] $1000 [ ] $1500 [ ] $10,000
[ ] Would you like information about including us in your estate?
[ ] Have you already included us in your will?
[ ] Would you like stock transfer information
[ ] I'd like to join your email list

And we make them fill in their credit card and address information!

Let's Get **R.E.A.L.!**

Let's Get **R.E.A.L.!**

Let's Get **R.E.A.L.!**



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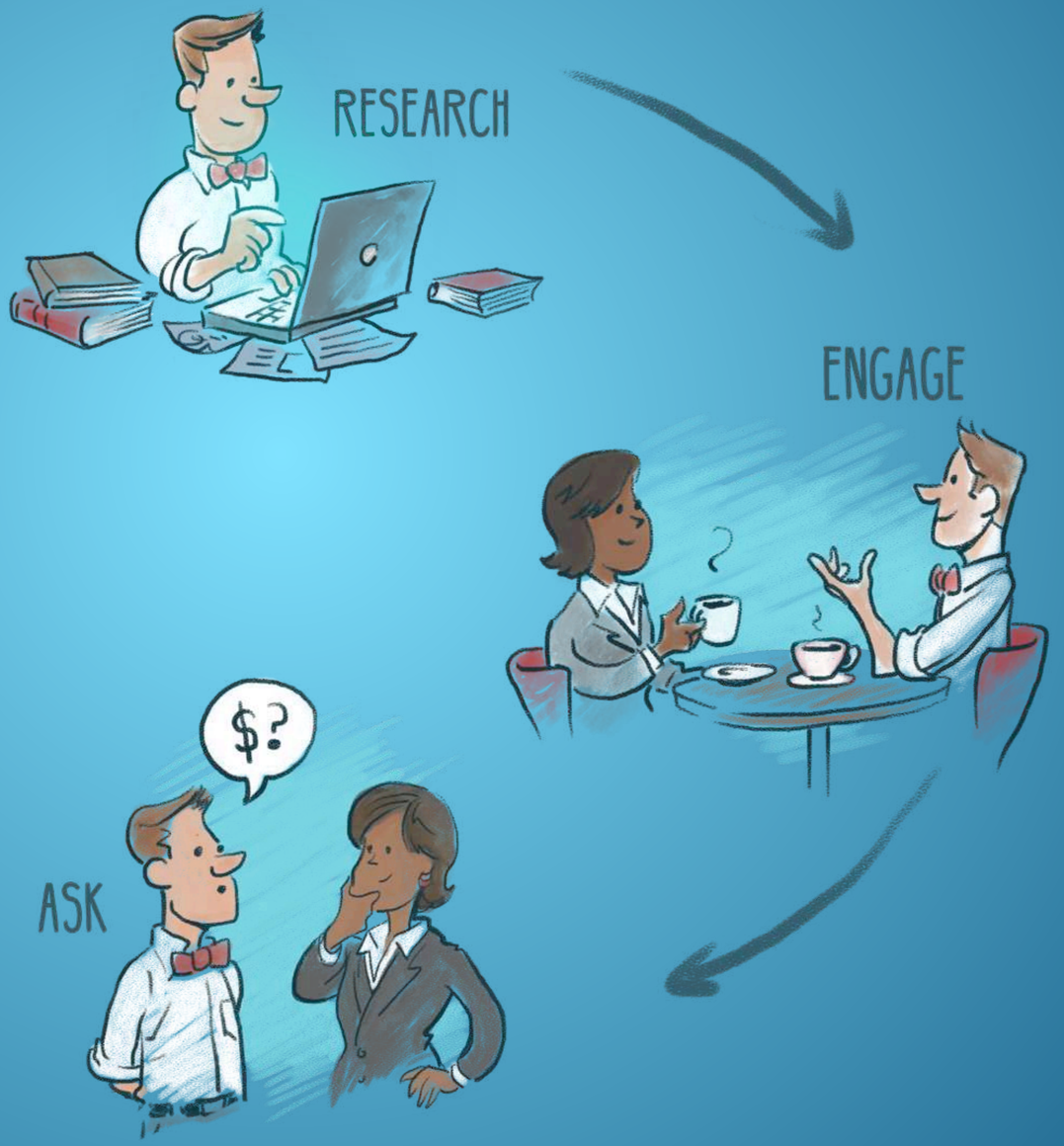

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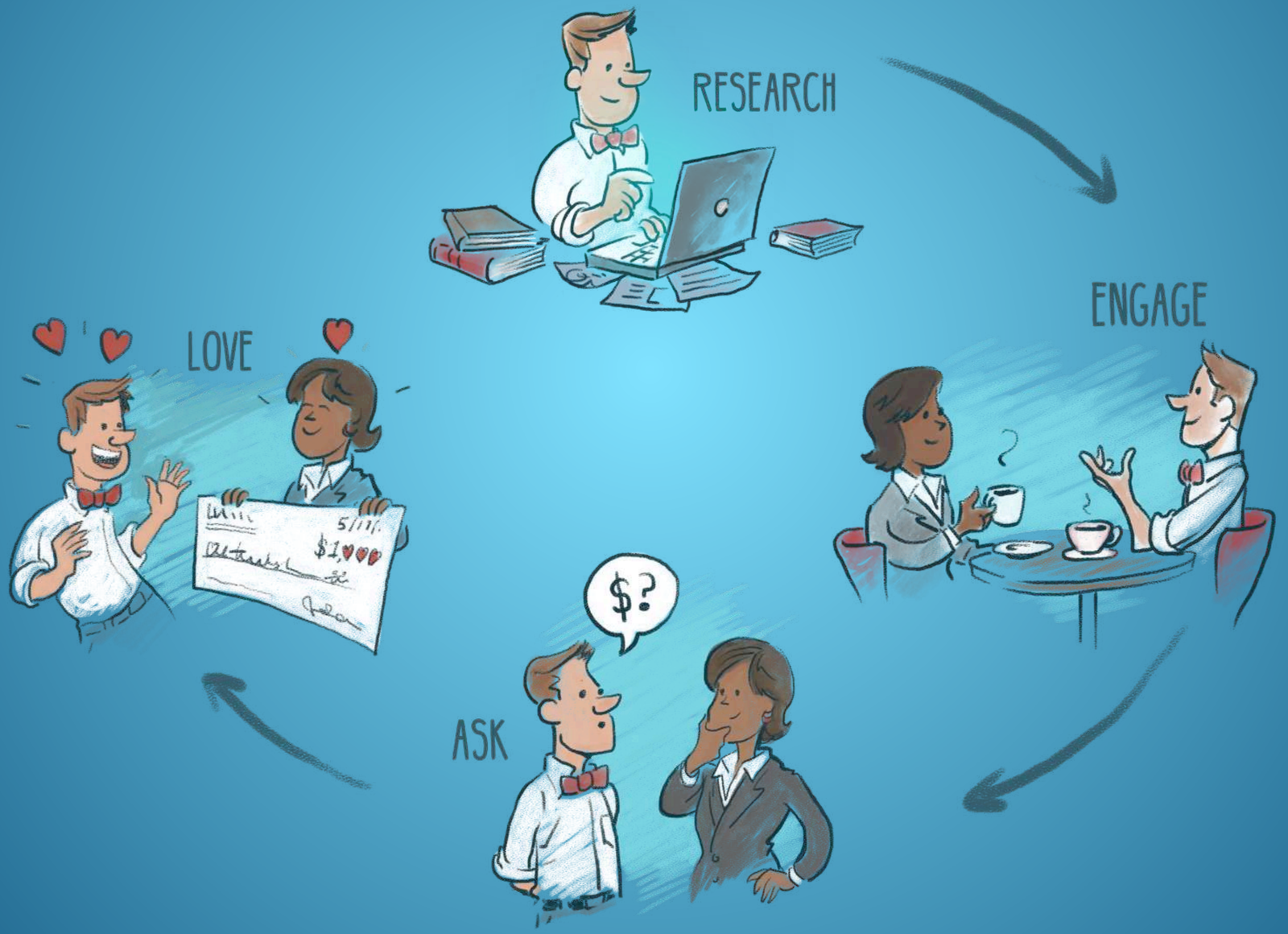

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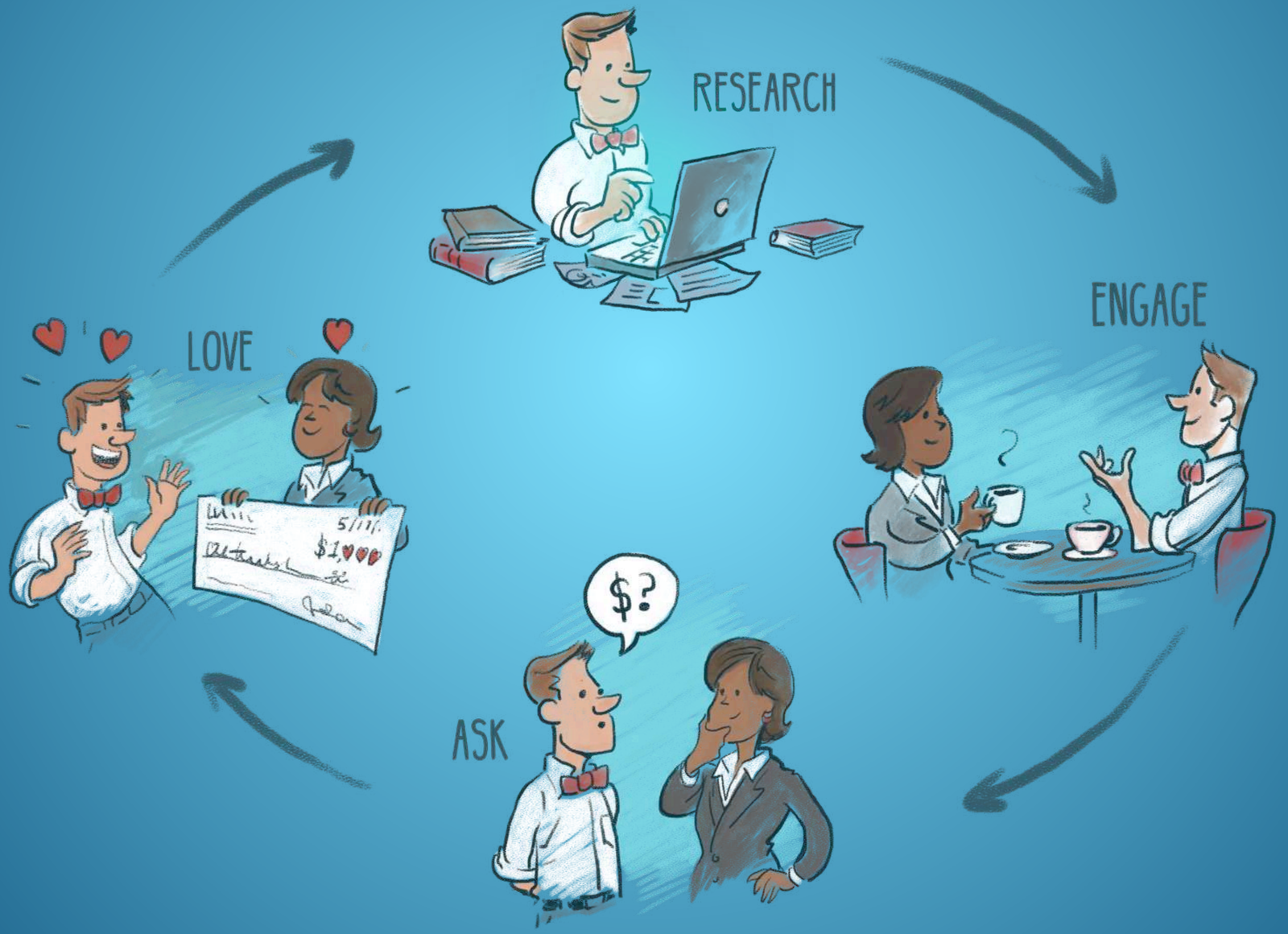

• Research •

• Research •

About your goals:

CASE STATEMENT

• Research •

About your goals:

CASE STATEMENT

DRAFT

• Research •

About your goals:

CASE STATEMENT

GIFT TABLES

www.GiftRangeCalculator.com

Target Amount: 100000 calculate

GIFT RANGE	# GIFTS REQ.	# PROSPECTS REQ.	SUBTOTAL	CUMULATIVE TOTAL	CUMULATIVE %
25000	1	5	25000	25000	25%
15000	1	5	15000	40000	40%
10000	2	10	20000	60000	60%
7500	2	10	15000	75000	75%
5000	3	15	15000	90000	90%
2500	4	20	10000	100000	100%
2000	6	30	12000	112000	112%
1000	8	40	8000	120000	120%
500	10	50	5000	125000	125%
250	12	60	3000	128000	128%
Total:	49	245		128000	

You'll notice the total adds up to over 100%. This is intentional.
(1) Costs of construction always tend to go up.
(2) Nonprofits often neglect to budget donor recognition in their plans.
Plaques and signs always add up to more than we expect.
(3) It's always better to raise more than you need.

• Research •

About your goals:

CASE STATEMENT

GIFT TABLE

NAMING OPPS

• Research •

About your prospect:

- Google
- Magazines
- DonorSearch, Target Analytics, Wealth Engine, iWave

BE REALISTIC

AVOID PARALYSIS BY ANALYSIS

• Engage •

I'M
NOT
YOUR
ATM

4
3
2
1
5
6
7
8
9
0

• Engage •

A fulltime major gift officer typically has 125 – 150 assigned prospects

Not fulltime? Divide 150 by the percentage of time for major gifts.

• Engage •

A fulltime major gift officer typically has 125 – 150 assigned prospects

Not fulltime? Divide 150 by the percentage of time for major gifts.

Build a dashboard

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	*Rank (1,2,3)*	*Donor Name*	*Amount to Ask*	*Month to Ask*	*R.E.A.L. Stage*	*Notes*	*August*	*September*	*October*	*November*	*December*	*January*	*February*	*March*	*April*	*May*	*June*	*July*
2		John Doe	$25,000	September	A	John asked me to ask in September	secure solicitation appointment	Ask	Special note of thanks	Impact report	Year end note of thanks with another impact story	Thank you from CEO	Impact video (maybe from cell phone)	Engage visit	Birthday note	End of school year note?	Check in about daughter's wedding last month	prep for Sept solicitation
3																		
4																		
5																		
6																		
7																		
8																		
9																		

• Engage •

A fulltime major gift officer typically has 125 – 150 assigned prospects

Not fulltime? Divide 150 by the percentage of time for major gifts.

Build a dashboard

• Engage •

	A	B	C	D	E	F	G	H	
1	*Rank (1,2,3)*	*Donor Name*	*Amount to Ask*	*Month to Ask*	*R.E.A.L. Stage*	*Notes*	*August*	*September*	*Octob*
2		John Doe	$25,000	September	A	John asked me to ask in September	secure solicitation appointment	Ask	Specia thanks
3									
4									
5									

ed

Not fulltime? Divide 150 by the percentage of time for major gifts.

Build a dashboard

• Engage •

	A	B	C	D	E	F	G	H	
1	*Rank (1,2,3)*	*Donor Name*	*Amount to Ask*	*Month to Ask*	*R.E.A.L. Stage*	*Notes*	*August*	*September*	*Octob*
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3									
4									
5									

ed

Not fulltime? Divide 150 by the percentage of time for major gifts.

G	H	I	J	K	L	M	N	O	P	Q	R
August	*September*	*October*	*November*	*December*	*January*	*February*	*March*	*April*	*May*	*June*	*July*
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• Ask •

• Ask •

#1 **Reason** people don't give?

argus
argoflex

• Ask •

	A	B	C	D	E	F	G	H	
1	*Rank (1,2,3)*	*Donor Name*	*Amount to Ask*	*Month to Ask*	*R.E.A.L. Stage*	*Notes*	*August*	*September*	*Octob*
2		John Doe	$25,000	September	A	John asked me to ask in September	secure solicitation appointment	Ask	Specia thanks
3									
4									
5									

4
3
2
1
5
6
7
8
9
0

• Setting Up the Appointment •

BE CLEAR

"I'd like to talk about your support of the project…"

DON'T get into an ask on the phone

GO IN PAIRS WHEN POSSIBLE!

Keeps accountable

You see different things

• Setting Up the Appointment •

BE CLEAR

"I'd like to talk about your support of the project…"

DON'T get into an ask on the phone

GO IN PAIRS WHEN POSSIBLE!

Keeps accountable

You see different things

Don't get hung up on "pairs."
Fundraisers raise funds.

• Making the Ask •

ASK FOR A SPECIFIC DOLLAR AMOUNT

The complete dollar amount
($1,000 vs. $84/month)

PHRASES

"Would you consider a gift of $10,000 toward this?"

"I have no idea what to ask you, but I'd like to ask you to consider a gift of ____"

• Making the Ask •

ASK FOR A SPECIFIC DOLLAR AMOUNT

The complete dollar amount
($1,000 vs. $84/month)

RAS

Wo[illegible] you cons[illegible]er a g[illegible] $10,000
ow[illegible]

"I have no idea what to ask you, but I'd like to ask you to consider a gift of ____"

THEN

• Making the Ask •

SHUT UP

The prospect needs time to process your request

You need to respectfully give her as much time as she needs

She’ll let you know she’s done by talking first

• Making the Ask •

PHRASEOLOGY

Make Your Own Gift First!

"I can appreciate that"

PROPS

Renderings

Gift Charts

OPTIONS: Arrows in your quiver

Quarterly giving options

Maybe: good, better, best

• Talk to Your Steering Wheel •

• Handling Objections •

WHAT ARE COMMON ONES?

One per post-it note

Then group them in themes

USUALLY ONLY 7-10 THEMES!

DON'T HAVE THE MONEY

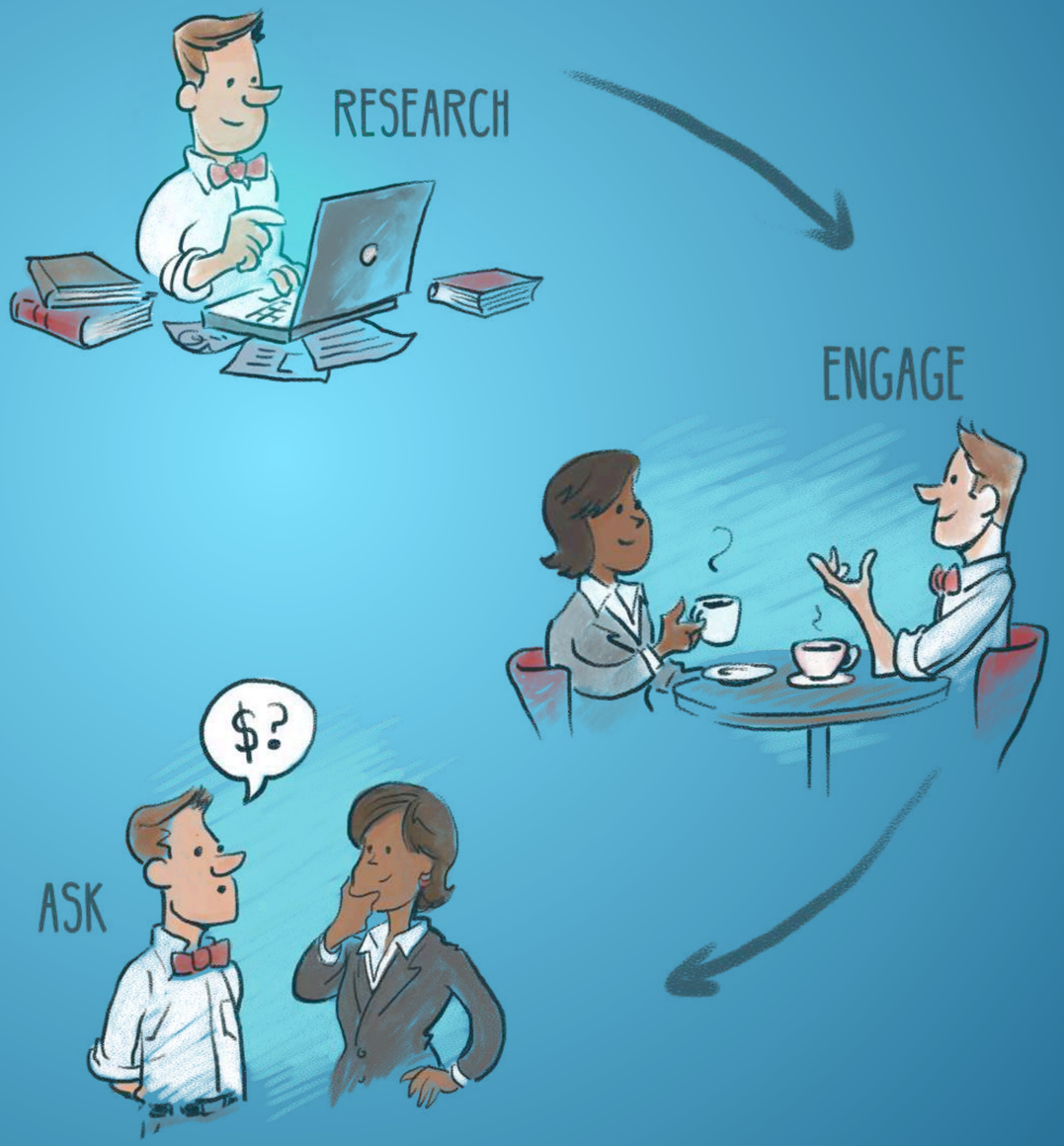
When might you?

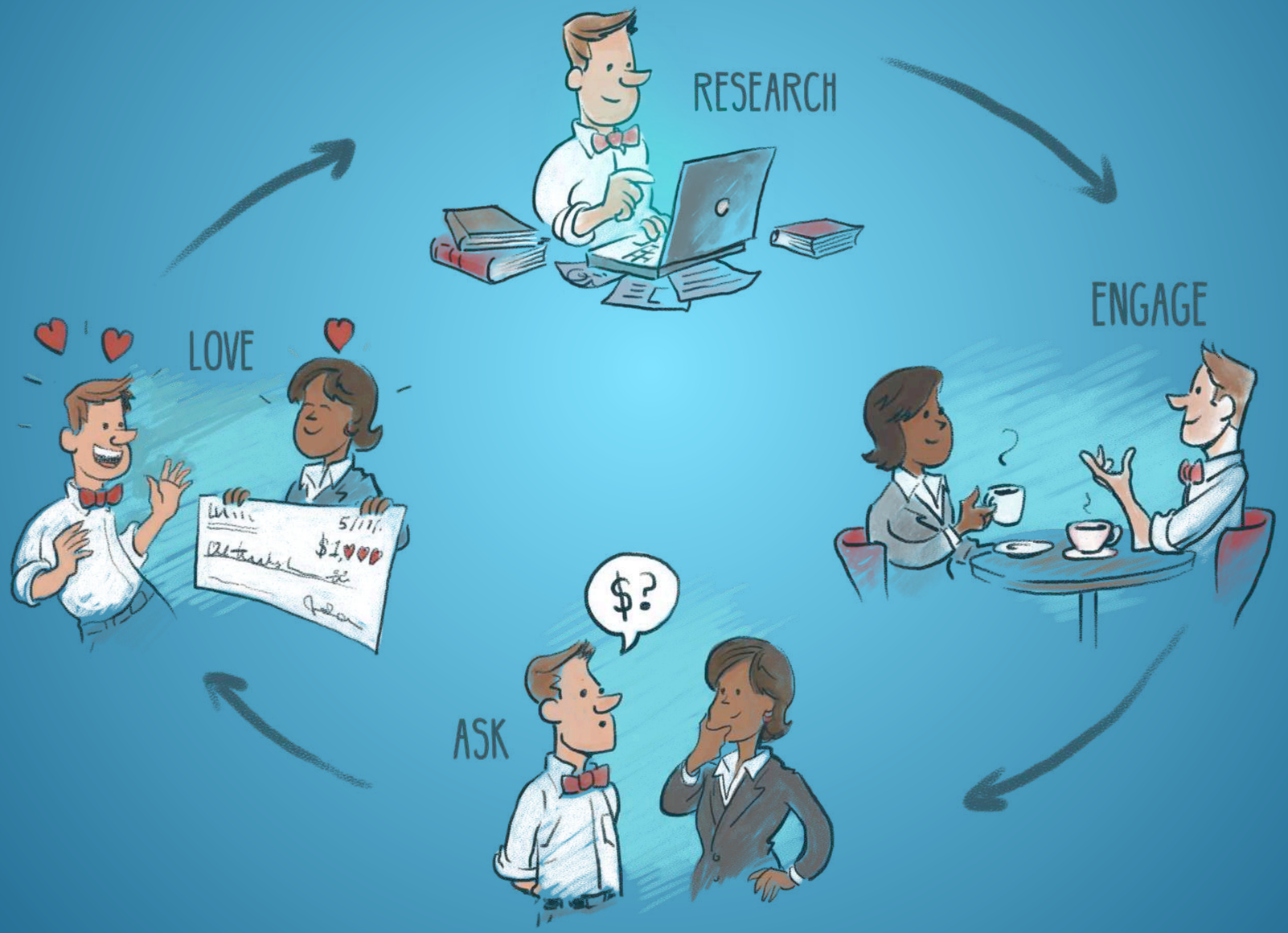
When may I come back?

GIVING ELSEWHERE

Best objection

"How could we get in your top 10 giving priorities?"


RESEARCH
ENGAGE
$?
ASK


RESEARCH
ENGAGE
ASK
$?
LOVE
$1,000

• Love/Like/Live •

LOVE/LIKE THE PERSON ANYWAY—THEY'RE MORE IMPORTANT THAN THE GIFT

This business is ALL about relationships

LIVE WITH THEIR RESPONSE!

You don't always have to like the response but keep on loving the person

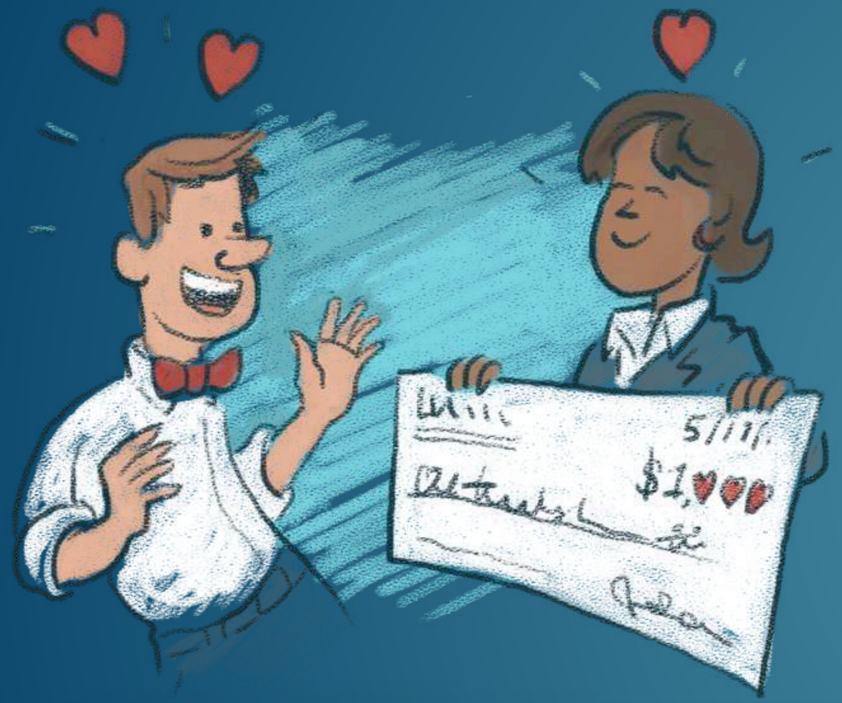
• Love/Like/Live •

SHOWING THEM YOU SEE THEM AS A PERSON

INVOLVE THEM IN VOLUNTEERING AND MEMBERSHIP

COME BACK TO THEM WITHIN 90-DAYS, WHETHER THEY SAY YES OR NO.

• Love/Like/Live •



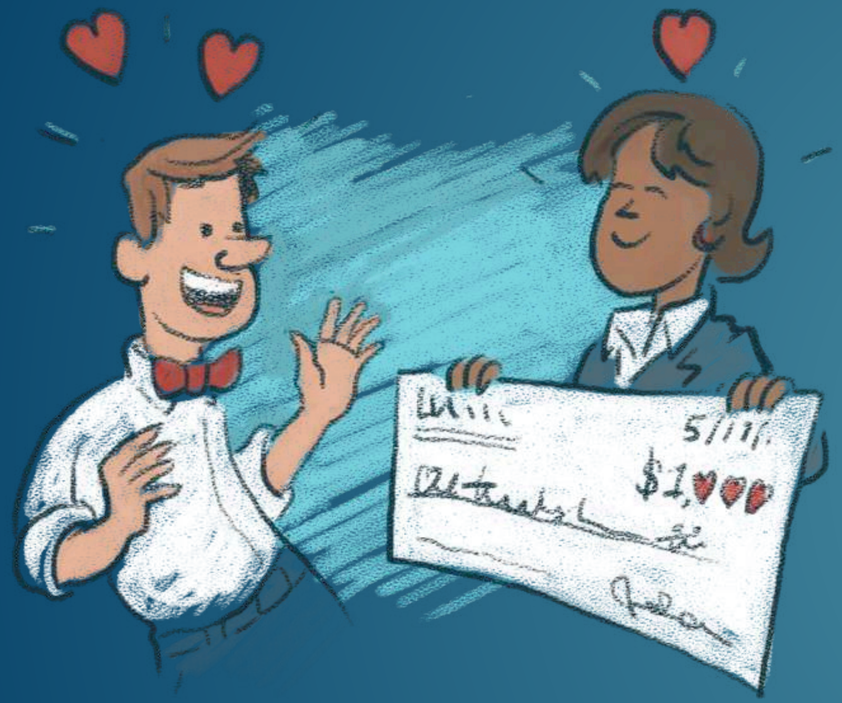
SHOWING THEM YOU SEE THEM AS A PERSON

INVOLVE THEM IN VOLUNTEERING AND MEMBERSHIP

COME BACK TO THEM WITHIN

August	September	October	November	December	January	February	March	April	May
secure solicitation appointment	Ask	Special note of thanks	Impact report	Year end note of thanks with another impact story	Thank you from CEO	Impact video (maybe from cell phone)	Engage visit	Birthday note	End of school year note?

• You Can Do It! •



BEE YOURSELF

MAKE YOUR GIFT FIRST!

DON'T FEEL GUILTY THAT YOU'RE AFRAID

HAVE COURAGE
(it’s not courage without fear)

KEEP IT SIMPLE

HAVE FUN!

Additional **Resources**

MovieMondaysVideos.com

Weekly coaching emails
FundraisingKick.com

100DonorsProgram.com

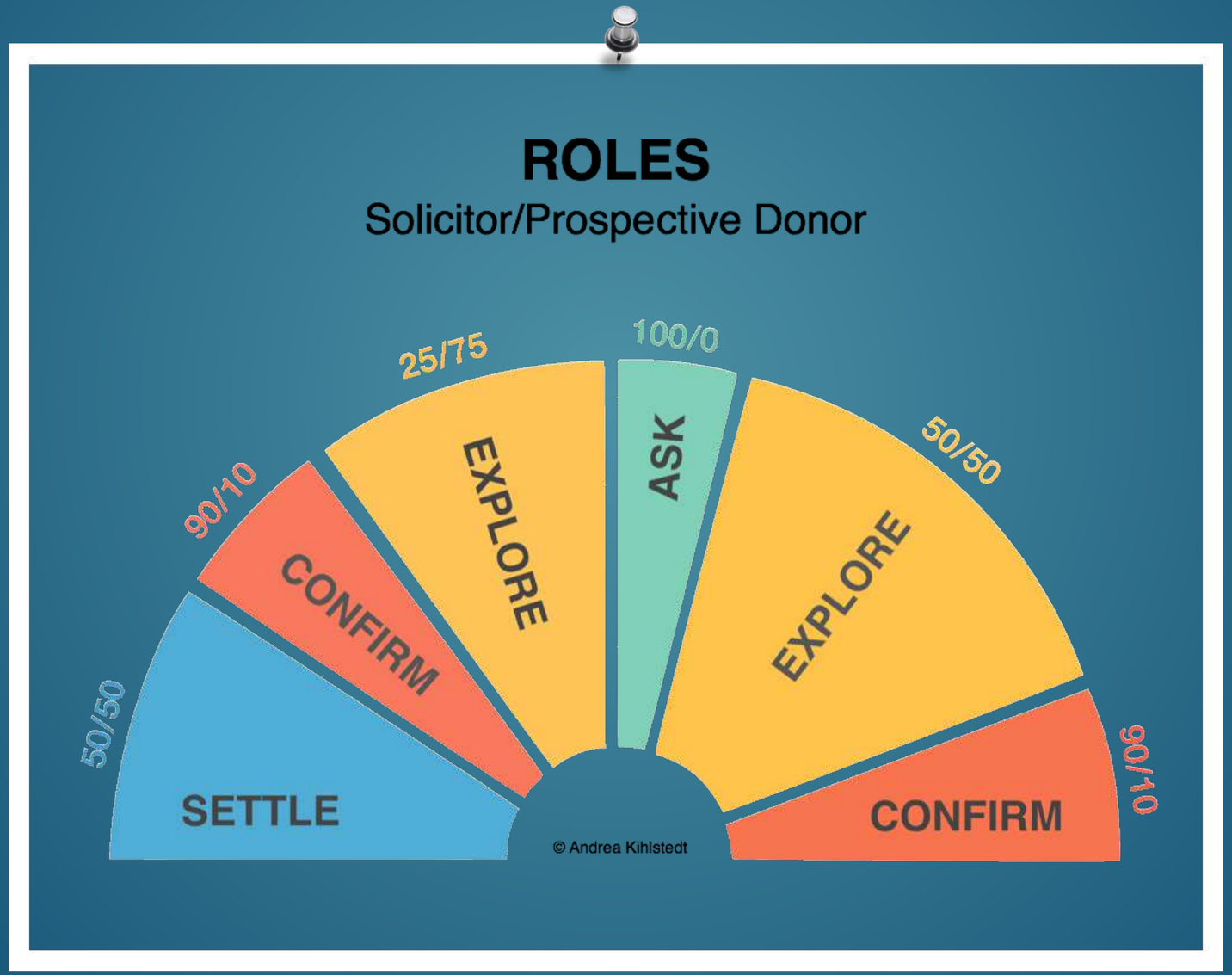
DonorRetentionJazz.com

http://bit.ly/NPStoryConf

101.FundraisingCoach.com

TheNonprofitAcademy.com

• The Arc of the Asking Conversation •



• Handling Objections •

YOU DON'T HAVE TO HANDLE THEM ALL!!!

You are a fund raiser not an objection answerer

TWO OBJECTION STOPPING QUESTIONS:

If I can answer this to your satisfaction, is it the only thing standing in the way of you making a gift?

If I can't answer this to your satisfaction, would it prevent you from making a gift?