

Getting To **KNOW YOU**

42

QUESTIONS TO ASK

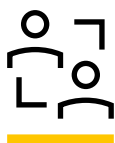
Major Donor Prospects
Before You Ask for a Gift



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INTRODUCTION



Here's a little secret in major gift fundraising that's often overlooked: It's all about the relationship, not just the "ask"! Too often, development directors, major gift officers, and even board members are rushing to identify prospects and immediately ask for a gift. This is like putting the proposal cart before the beautiful relationship-building horse.

If you ask too soon, you'll get less than you truly could. Why? Because you've made it about a quick transaction instead of a lasting connection. Transactions only skim the surface.

If you want your donor to dig deep and give from their heart, they need to be inspired, truly moved. They need to trust that you value what they value, and that you'll work hand-in-hand with them to bring their passions to life, fulfill their dreams, and help them be the heroes they yearn to be.

Your success blossoms less from how well you ask for gifts and more from how well you've guided your major gift prospects on a journey with you — one where you've built a strong, personal connection.

**SET UP A WARM,
INVITING VISIT
SO THEY CAN
TELL YOU
ALL ABOUT
THEMSELVES.**

So, put that relationship-building ‘horse’ proudly before the fundraising ‘cart’! Instead of rushing to schedule appointments to tell folks about your exciting project, set up a warm, inviting visit so they can tell you all about themselves. Appointments aren’t much fun, are they? You make ‘appointments’ with dentists and auto mechanics. But you have joyful visits with friends! While you might feel the urge (or the push) to set up appointments to sell your proposal and ask for money, the absolute best way to do it is to set up visits where you simply ask your prospects questions about themselves and truly listen to their answers.

Major gifts happen when your organization’s values and your donor’s passions perfectly align. It’s your mission to uncover their values and help them discover the heart of your organization. Make this a deliberate, heartfelt journey.



“Getting to know you” QUESTIONS

Here are some thoughtful questions to spark conversations with prospective donors, helping them talk about what truly lights them up before you even begin to share your project. The better you connect with them, the more perfectly you can tailor your proposal to their unique interests.

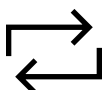


Please Tell Your Story

People absolutely love to talk about themselves. Their career, their kids, their grandkids, where they’ve lived, and how they’ve arrived where they are today. It’s easy for folks to talk about what they know best, making it a fantastic way to begin your conversation. Plus, it gives you a wonderful chance to connect on a personal level — maybe you’ve visited their hometown, attended their alma mater, or can relate to other tidbits they joyfully share.

Listen with all your heart. So much of building strong relationships is about empathy. When a donor shares their story, try to jump right into it with them.

1. *Where were you born?*
2. *How did you get where you are today?*
3. *What were the most important lessons you learned from your parents?*
4. *Would you tell me a bit about your family?*
5. *If you won the lottery, how would you spend your time?*
6. *What are you most proud of?*
7. *If you could leave a legacy for future generations, what would it be?*



Share Your Wisdom

People absolutely love to share their wisdom and give advice. In fact, there's a fun adage in major gift fundraising: "If you want advice, ask for a gift; if you want a gift, ask for advice."

8. *What do you think about ___ [a project or a campaign]? (See if they think it's something your organization should be doing.)*
9. *Please give me your guidance on ___? (Ask them how they might recommend getting people interested and involved. Where do they think the necessary philanthropy might come from?)*
10. *What do you think we should do? (Ask them if they have other suggestions or ways to approach this issue.)*
11. *Are there others you would recommend we contact to brainstorm this idea? (This is a brilliant way to draw them in further, helping them see themselves as a true leader and contributor at the ground level. It also gently lets them know you'd love for them and their network to get involved.)*
12. *How would you approach the next steps if we want to bring this project/campaign to fruition?*
13. *Can you tell me more about that? (This is one of my favorite questions. It truly shows you care to hear their deepest thoughts. Plus, you'll often get your most valuable information when you ask something so wonderfully open-ended!)*



Philanthropic Interests & Giving

Let's be real, most people you'll meet weren't born yesterday. They know precisely why you want to meet with them. So, why not be upfront and joyful about it? I often give prospective donors a friendly heads-up that I'd love to chat with them about their philanthropic interests and get their wise advice. Don't feel shy about this; it's a wonderful conversation.

Talking about philanthropic interests is not the same as making a proposal (not yet, anyway!). But by letting folks know you'll want to engage them on this topic (among other exciting things), it makes it so much more comfortable for you to ask those important "getting to know you" questions that will absolutely boost the chances of a "yes" when you do make your proposal.

14. *What truly shapes your philanthropy? (Is it personal values? Family consensus? Shaped by current events?)*
15. *What are your top three giving priorities? (This is a fantastic question. Sometimes, you'll uncover a passion your donor has that ties into one of your programs they weren't even aware of! For example, while working for a social services agency, I met a donor who told me one of her causes was child bullying. I immediately shared details about a new anti-bullying program we were running, and she ended up funding it.)*
16. *What's the best philanthropic decision you've ever made? Why? (This question keys you into what kind of impact your donor hopes to create and how they evaluate opportunities.)*
17. *Why do you give to our organization? (This helps you uncover their values and their personal connection to your incredible work. Someone once told me she started giving because her parents supported us. Since she had just shared that her father recently passed away, this opened a heartfelt conversation about a memorial gift in his honor.)*
18. *Where do you feel the mission (or work) of our organization truly aligns with your values?*
19. *Which of our programs do you find most compelling? (This helps you draw out their specific areas of interest so you can perfectly match your proposal to their passions when that exciting time arrives.)*
20. *What do you think about our organization? (This gives your donor a wonderful opportunity to either vent or gush. If they don't have a ready answer, sometimes I'll gently probe by asking them to describe the organization using three powerful adjectives.)*
21. *What do you think of our plans? (This is perfect when you've come to discuss a new campaign or project.)*
22. *Who else should I be talking to? (Sometimes you'll discover they'd love to include a significant other or a trusted adviser.)*
23. *What haven't I asked that I should? (Please, don't ever skip this question! You can learn more here than from any other single question.)*



BEST NEXT STEP QUESTIONS



After you've given your prospect plenty of time to joyfully share about themselves, it's now time to flip the tables and see what questions they'd love to have answered. This helps you understand where your donor is on their journey with you — from initial awareness to sparkling interest, active involvement, and finally, impactful investment. Do they need more facts and figures? Do they need to meet another inspiring person? Would they love to attend a tour or an event? Or do they seem just about ready for that exciting ask?

What you do next will depend entirely on how much more your donor needs to learn about your incredible organization, your inspiring leaders, and/or your impactful campaign/project before you invite them to make a specific major gift.

Help Your Donor Learn More

People always have questions. It's your job to draw these out so you can provide all the wonderful information your donor needs to fully consider your request.

24. Are there any questions I can answer for you?

25. We'd love to keep you up-to-date! Is there a particular area of the organization/campaign/project we can highlight just for you?

26. Is there anyone at the organization you'd love to meet?

27. Have you had the opportunity to read our strategic plan, or hear our inspiring vision for the future?



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*Or do they seem just about **READY FOR THAT EXCITING ASK?***

**FOR SOMEONE
TO MAKE A
PASSIONATE
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THEY MUST
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Build Trust

People almost always have a concern or two, and that's perfectly natural. Your goal is to gently bring these out so you can address any tiny doubts your donor might have. For someone to make a passionate major gift, they must trust you completely, with all their heart.

28. I hope you'd agree our mission is so important and our work vital to [population served]. What are your impressions of our effectiveness?

29. I hope you'd agree our campaign/project is truly important and that success would mean so much to [population served]. What are your impressions thus far?

30. I hope you enjoyed meeting [top executive]. What were your impressions of her?

31. Do you feel that your giving to our organization is genuinely making a difference?

32. When you talk to your friends about [org name], what wonderful things do you tell them?

Inspire Involvement

It's so lovely to let your donor know you value them for more than just their money! This holds true whether or not they seem ready for a proposal right now. While not everyone will want to get involved in hands-on activities, some absolutely will. And if they do, it's likely to deepen their incredible investment with you over time.

33. How would you like to be involved in the coming year? Can I highlight a few ways others in the community have partnered with us?

34. Would you ever consider [volunteer opportunity]?

35. What has been most meaningful to you about your involvement at [other org]?

36. What other thoughts do you have as to how you might help us address these important issues?

An added benefit of asking these questions? You'll most likely find you're having a lot of fun, and your donor will, too! The truth is, most people absolutely delight in chatting about their interests, passions, and ways they can become involved. This brings deep meaning and purpose to their lives, and you've given them a wonderful opportunity to find that meaning by actively engaging with them and drawing them out. Guess what? This tends to make them truly like you. And what better foundation is there for developing and sustaining a beautiful relationship? Just make sure you listen, and enjoy every moment.

READINESS TO GIVE QUESTIONS



Never lose sight of your ultimate, joyful purpose. The reason you're on a "getting to know you" visit is to perfectly craft your proposal so your prospect is eager to take a look at it and give it some serious, heartfelt consideration.

But, how do you know if your prospect has reached this point of readiness? You simply ask!



Here are some illuminating examples:

The "testing the waters" conversation.

"Before we wrap up our wonderful conversation today, I'd love to get your final thoughts on this project we've discussed. We know it's ambitious, and... [We're seeking inspiring leaders to bring it to fruition... or... we've been so humbled by the outpouring of community support thus far]."

37. Would you agree it's the right thing at the right time?

38. Have you ever been involved in a project quite like this?

The "idea" conversation.

"You've been such a cherished friend of the organization over the years. And I'm so thrilled we were able to meet and/or introduce you to [name] to chat a little more about our exciting plans in the area of [what you discussed]. We'll keep you informed of our progress, but we'd also love to explore some ideas with you for how you might get even more personally involved."

39. Can we come out to see you at your convenience next week to talk more about it?

40. Is there anyone else you'd like to include in this important meeting?



The “straight shooter” conversation.

“I’m absolutely delighted you were able to join us for this visit/tour. All of this incredible progress is happening thanks to the leadership and philanthropy from the members of this community. It would be truly wonderful to have your support as well.”

41. Are you ready to talk about supporting this project?

42. Can I treat you to lunch in about a week so I can share a proposal outlining what your involvement could beautifully look like?

If you receive positive, enthusiastic responses to any of these questions, you are done with cultivation and ready to leap into the magnificent “end game” — your solicitation!

ALWAYS BE PREPARED TO ASK the ultimate question



When opportunity knocks, throw open the door wide! Sometimes, that ‘end game’ can jump up and delightfully surprise you. This happens when it becomes crystal clear your prospect wants to be asked NOW. In fact, they expect to be asked now because they assumed this was the true, purpose of your visit.

If this moment occurs, you absolutely need to be prepared to ask. If you miss this golden opportunity, you’ll unfortunately unravel all your hard work up to this point.

Real World Example

I was on a donor visit with our amazing board president and our brand new E.D.. I had set up the meeting before the new E.D. came on board, but she made it very clear that my role was to observe and provide facts as needed; she was in charge.

We were meeting with a major donor we hoped would consider a \$200,000 gift, and his philanthropic adviser (whom I knew well from a previous job).

After we got through the pleasant preliminaries, the donor simply asked, “How do you want me to help?”



THE DONOR EXPECTED US TO DO OUR HOMEWORK AND PRESENT A THOUGHTFULLY CONSIDERED PROPOSAL.

The board president said something lovely about how much his support had meant over the years. Then the donor directly asked, “How much are you asking me for?” And the acting E.D. replied, “Oh, we’re not here to ask you today. We’re just here to talk.”

The philanthropic adviser, who knew me well, then said, “I’m sure she has an amount in mind.” The acting E.D. shot daggers at me, making it very clear my job was to stay silent. Yet, the donor was clearly signaling to us that we had his time and ear right then, and it was up to us to make the most of it. I wanted to crawl into a hole and disappear! Instead, I did what I could and gently turned it back over to the board president, asking her if she wanted to respond.

In the excitement of the moment, she blurted out (off the top of her head!), “We were hoping you might consider \$1 million!”

The donor actually laughed! It was so wildly out of proportion to what he’d given before, or what other donors were giving, that it truly was just a shot in the dark. And he was far too savvy for that. The donor expected us to do our homework and present a thoughtfully considered proposal. The acting E.D. then told him we’d send him a proposal so he could consider it further and decide on the amount he was comfortable with. He said he had another meeting to attend and would think about it.

Within a week, we received a check for \$5,000. End of story.

When your prospect joyfully demonstrates they’re ready, you need to be ready too! And here’s your impactful question:

Would you consider making a gift of \$ ___ to this project?

CONCLUSION

Think ahead about which of these 42 questions you'll ask your wonderful donors when you visit with them, and why. Imagine what might prevent them from joyfully saying "yes" when you make your ultimate major gift fundraising offer, and ask questions with the heartfelt intention of gracefully overcoming any hesitations or objections. With every interaction, you should have an objective in mind.

*To paraphrase Lewis Carroll
in Alice in Wonderland:*

“It’s only
when you
**KNOW WHERE
YOU’RE GOING**
that you’re
**VERY LIKELY
TO GET THERE.”**

To your success!

Fundraising and
donor management
software **BUILT** for
PURPOSE.

