



# **EXERCISING THE ASK MUSCLE: A PRACTICAL GUIDE TO FACE-TO-FACE SOLICITATION**

## **Guy Mallabone, MA,CFRE**

**Banff, Alberta**

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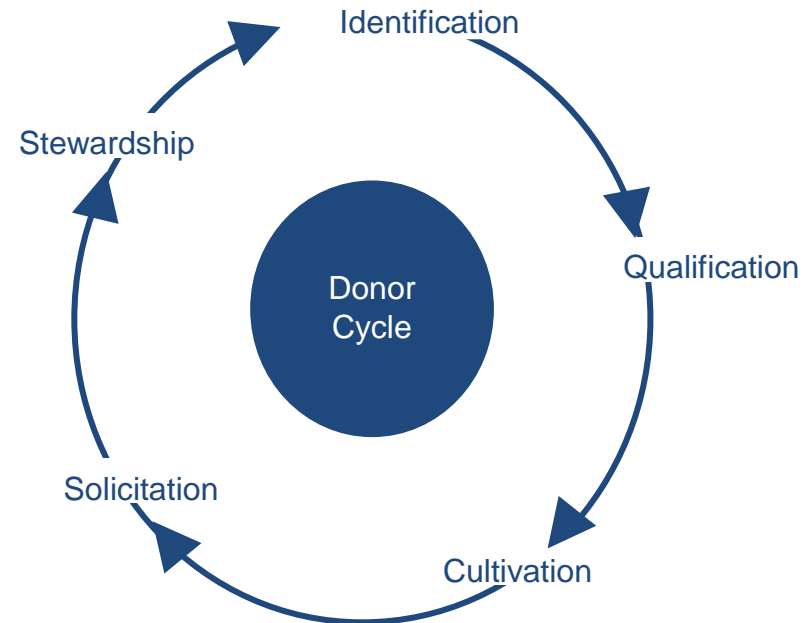
3:30 – 5:00 pm

# Agenda

- Solicitation Fundamentals
- Elements influencing a solicitation decision
- Thinking like an investor
- Elements of a successful ask
- The Case
- Preparing for the Ask
- Role Play Solicitation and Observation (x3)

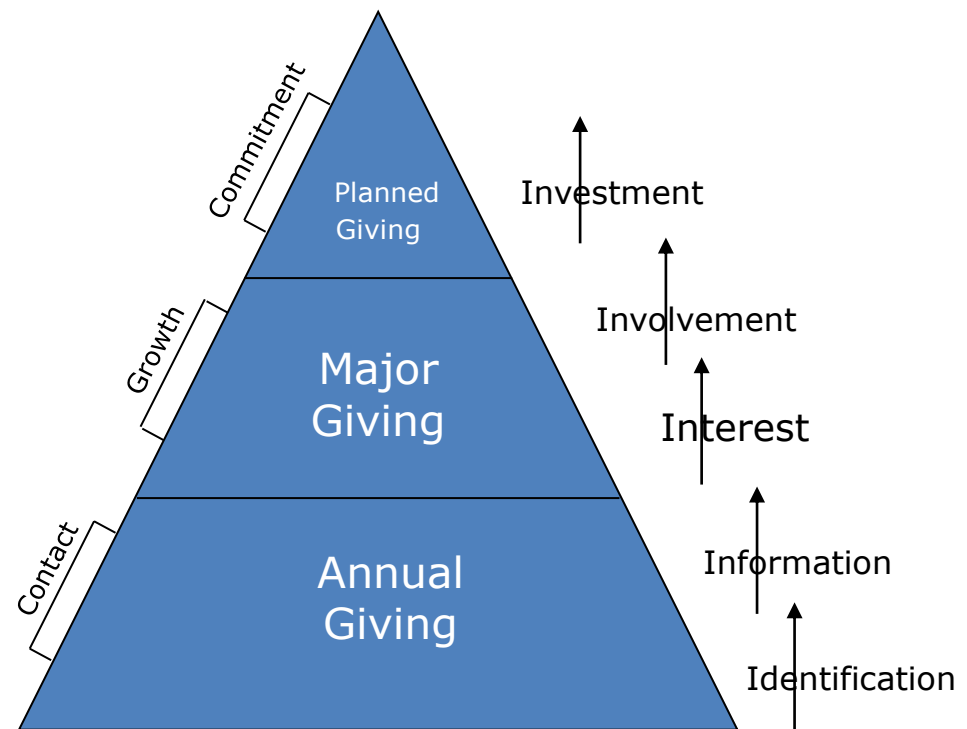
# A few introductory words about Major Gift Solicitation

- 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

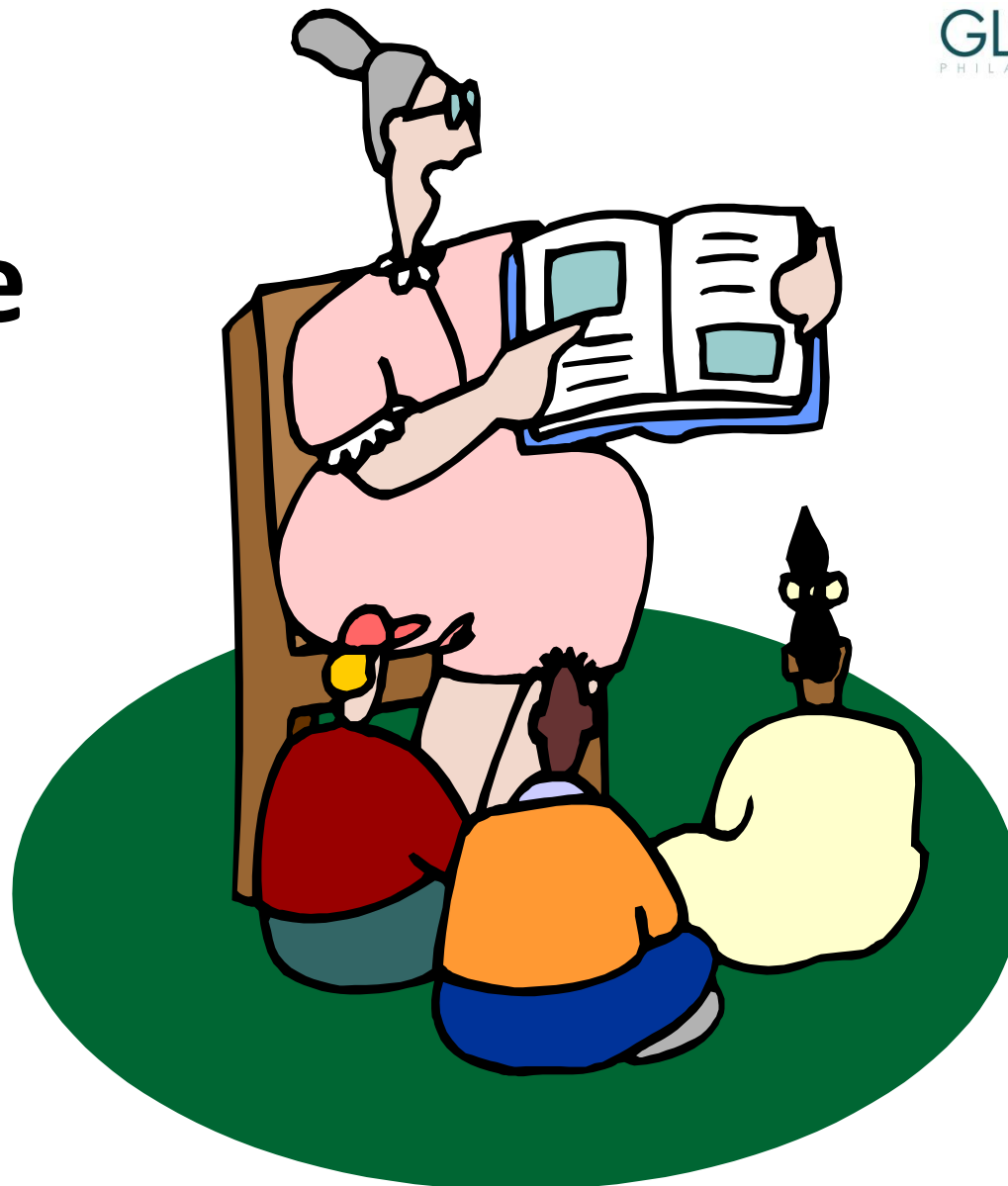


# The Importance of Major Giving

- Levers the success of annual fundraising
- Serves as the bridge builder for successful legacy fundraising



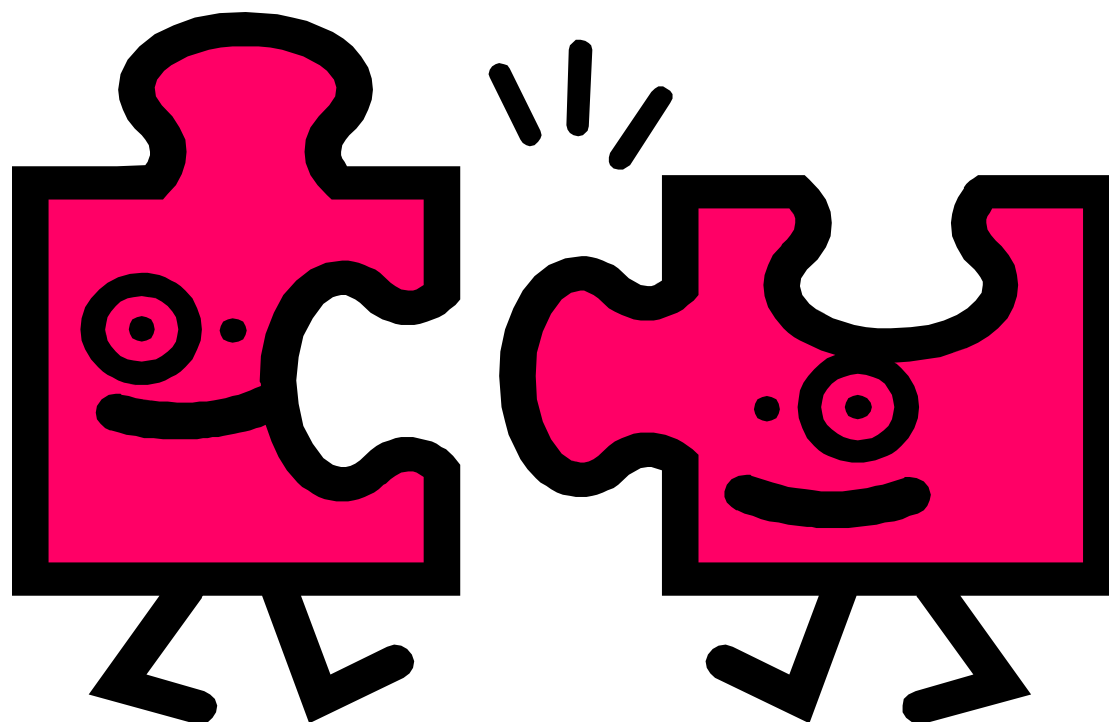
# The Case





# Exercise

## *Defining the Case*



# Solicitation Team

- Influencer
- Expert witness
- Asker
- Staff support



# Elements Influencing a Decision to Donate

- Is this a worthy case? (urgent and compelling?)
- Competence and readiness of the organization
- Confidence in the leadership
- Prospect feels part of a larger story
- Visible association with successful programming
- Being asked by the right person, at the right time, for the right amount
- Appropriate “stewardship” considerations
- Completeness of information presented

# 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?
- 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

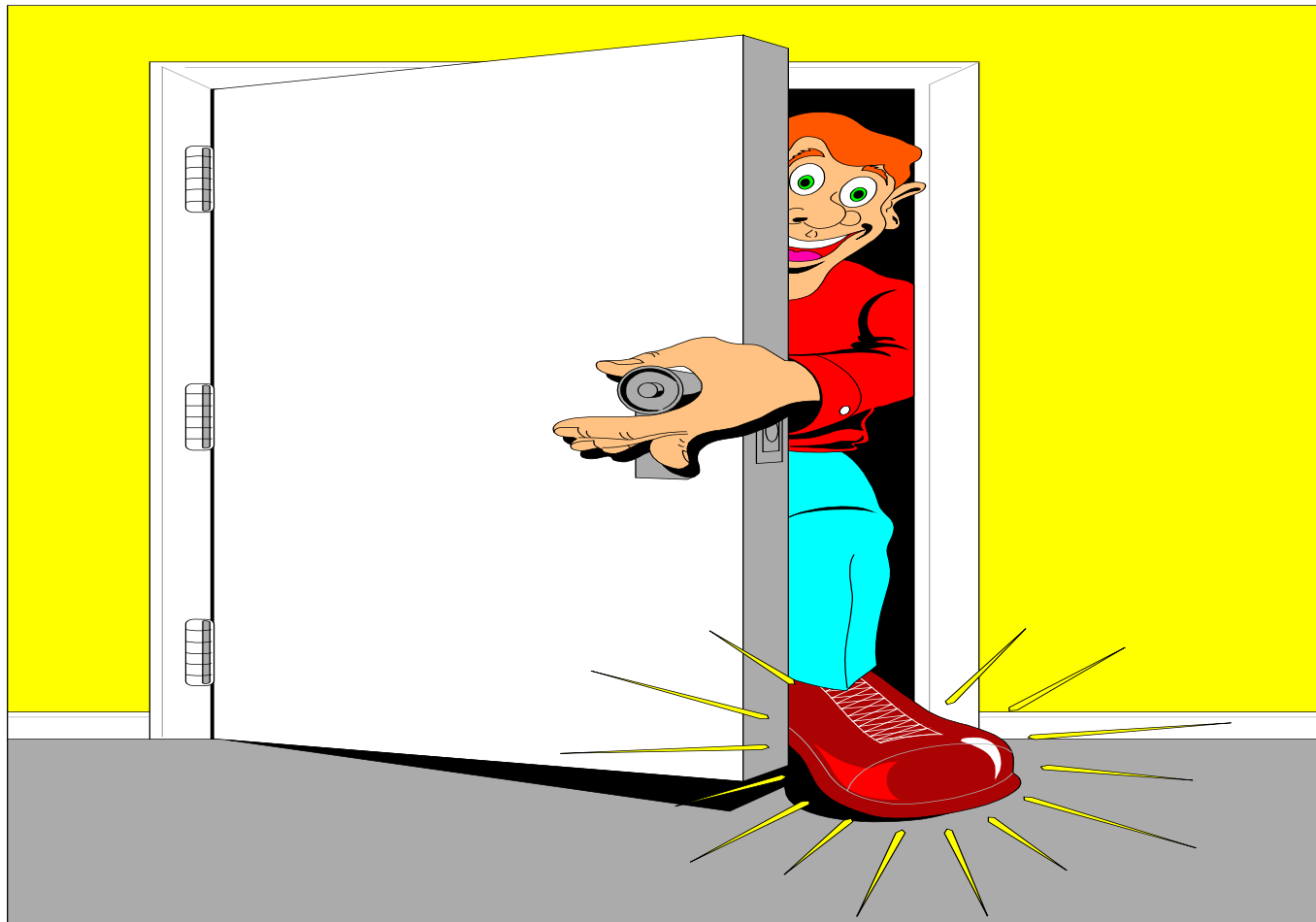
- Relax
- Leave the ego on the doorstep
- **You are not begging or asking for a 'hand out'**
- You are talking to someone who likely has an interest in what we are doing
- Enjoy the process (opportunity offerer)
- Your role is to help people see how they can make important projects happen
- Be ready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

# PREPARATION FOR THE VISIT

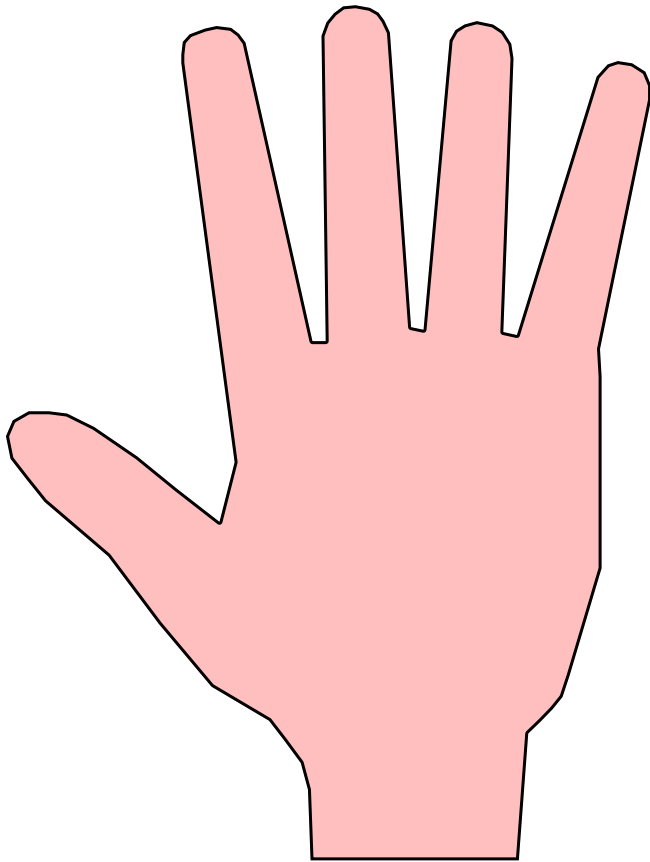
- Understand the case
- Know your prospect
- Know what you're going to say
- ***MAKE YOUR OWN GIFT FIRST !!***



# YOU MUST GET IN THE DOOR



# 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

**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 ! - 10%**



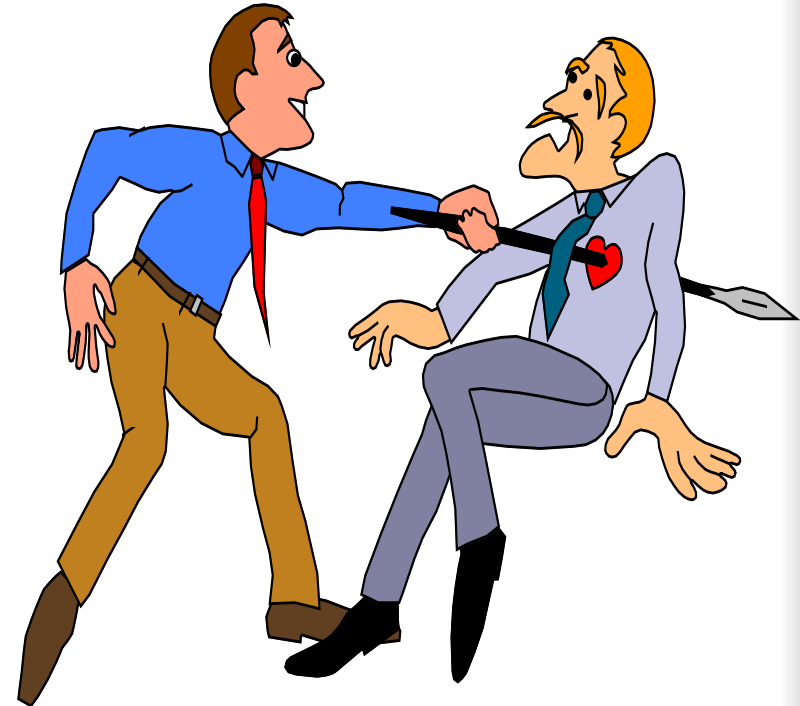
**THANK YOU**

**COMPLETE THE  
Letter of Intent**

NO - 5%

ASK WHY

IS IT SOMETHING THEY  
DON'T UNDERSTAND?

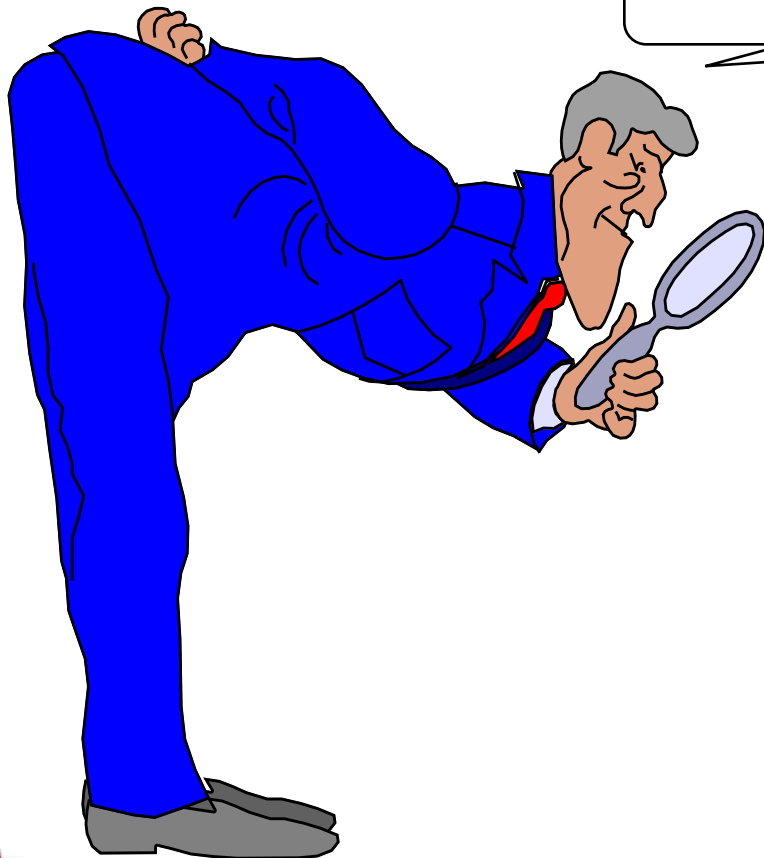


Second Chinese Fund Raising Proverb:

“Always Leave Open the Possibility of a Gift in the Future.”

## Offers A Lesser Amount - 15%

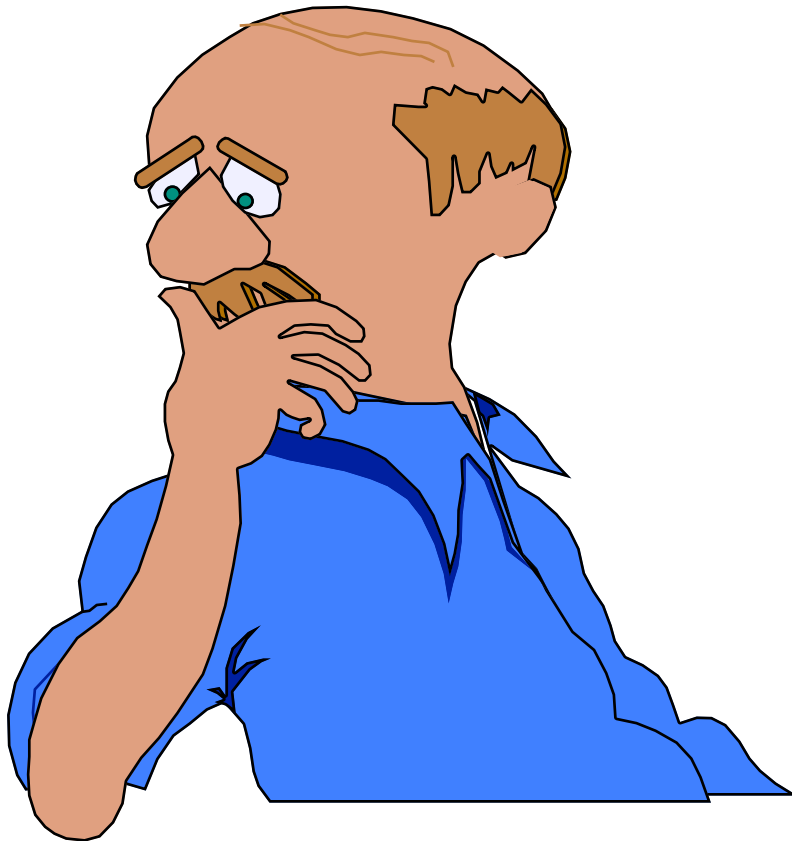
*Is this a Token Gift or their best ??*



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 - 70%

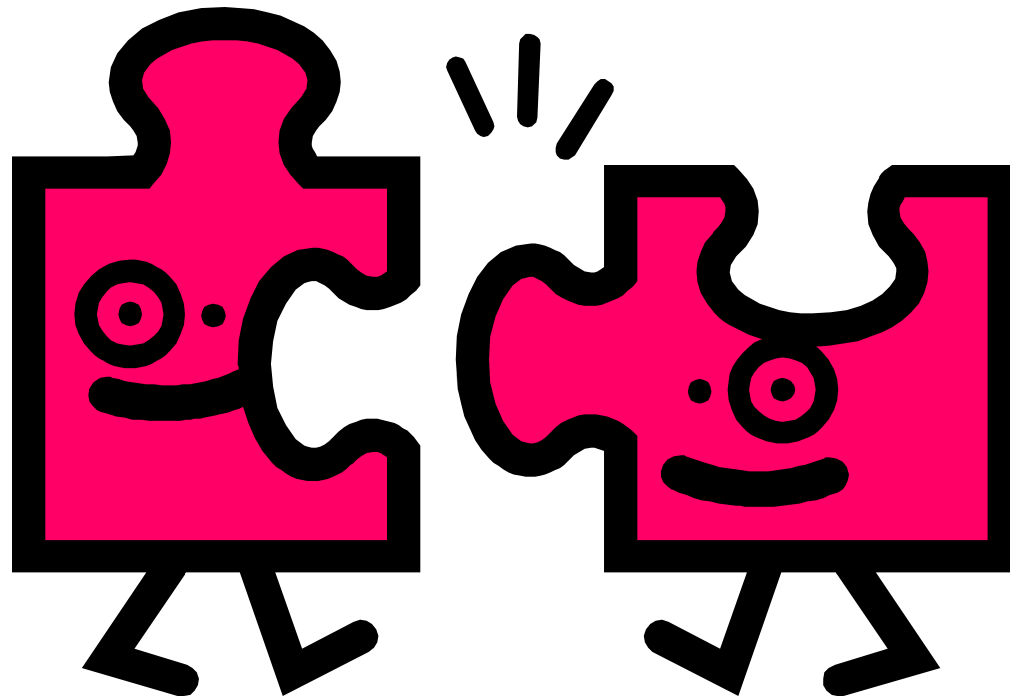


That's great!

Schedule follow-up  
appointment

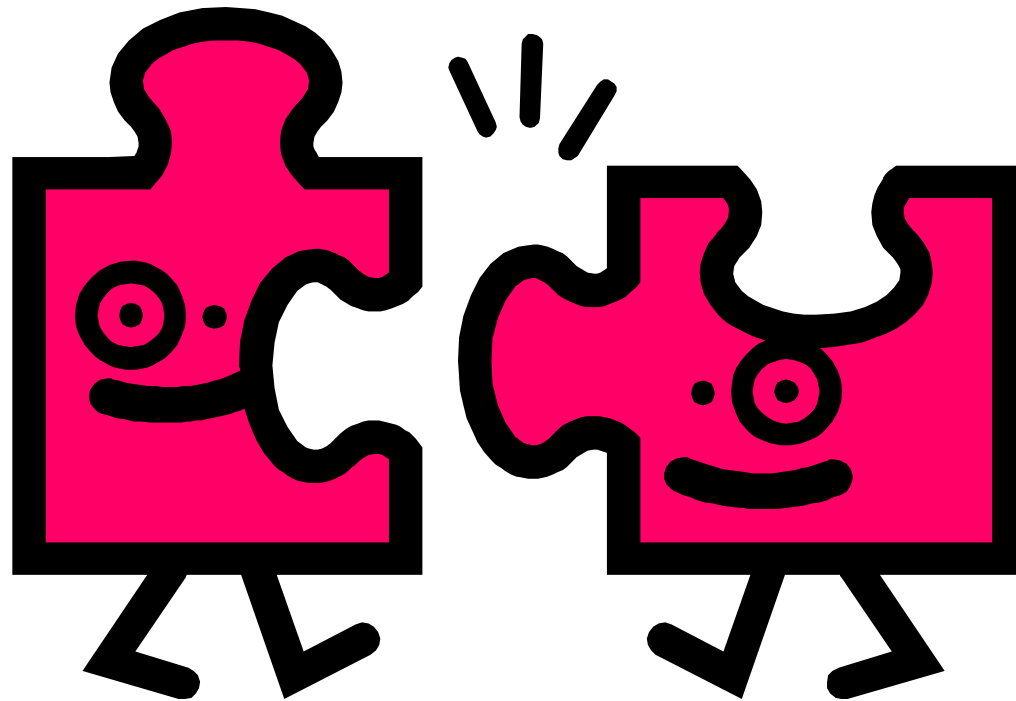
# Exercise

## *Major Gift Solicitation - PREPARATION*



# Exercise

*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?

