

# You Can Do It!

The Successful Ask: A Mini-Workshop  
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## 1. Before The Ask

Prospect Readiness  
Solicitation Preparation  
Scheduling the Interview

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### Prospect Readiness

- Best solicitations, especially for the largest gifts, have few surprises – everyone is ready.
- The donor understands the basic case and has made some indication of interest.
- The “solicitors” are prepared, they know the donor, the donor’s leverage points, the case AND how to ask!

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### Schedule the Interview

- Schedule time and place convenient and comfortable for the prospect.
- It is best to be in a private location, not a public one, such as a restaurant or even at someone's workplace.
- Ask for approximately 30-45 minutes for the meeting.

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### Schedule the Interview

- Be clear about the purpose of the meeting. Donors should not feel set-up.
- Take care not to discuss details or purpose of the gift/campaign – even if the donor pushes you. That is best done in person.
- And it is best not to send materials in advance – even if they ask.

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### Making the Phone Call

- Refresh your memory of the prospect's donor profile.
- Have donor profile at fingertips.
- Call when you are feeling upbeat.
- Best times to call are 10:00 am and 2:00 pm.
- Before you call review your own calendar.

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## The Call

“(Name,) you and I share an interest in (purpose). I (Volunteer/CEO, etc.) would like to bring (CEO, Development Officer, etc.) to meet with you to discuss your participation in the campaign to \_\_\_\_\_. When in the next two to three weeks is convenient for you for a brief meeting?”

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## Making the Phone Call

- Confirm it is important for the future of the community for the meeting to be in person.
- Make sure prospect has your name and telephone number to reschedule.
- Reconfirm date, time and place.
- Thank the prospect for his/her interest and state that you look forward to the meeting.

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## Overcoming a Brush-off

- “Just put the information in the mail.”
- “It’s important we meet with special supporters like you.”
- “It will not take long, I think you’ll be interested to know what I have to show you.”
- “I’m really busy right now.”
- “Can I call you tomorrow around 2:00 p.m.?”
- “When is a good time to reach you?”

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## Prepare for the Ask

Prepare a written plan:

- Who should go? Development Officer or team of two?
- Who will guide the conversation?
- Who will “do the ask”?:
- What amount is to be requested?
- What are prospect’s leverage points?
- What are prospect’s possible objections?

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## Prepare for the Ask

- Make your own gift – give the highest amount you are truly able to give.
- Make sure you are aiming high enough in the amount you are asking for.
- **THINK POSITIVE.**

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## 2. The Ask

The Ask  
The Question  
What’s Next

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## A Solicitor's Most Important Tools

- Knowledge
- Questions
- Silence

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## Knowledge

- The case
  - Why the organization exists
- The prospect
  - Giving, interests, affiliations
- The amount
  - Agreed by you and staff
  - Capacity and interest

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## The Interview

- Establish rapport.
  - Friends in common, weather, sports
  - Question them about interests
  - Question them about the service. Have you been a patient? Had family members in the hospital? Attended an event?
- Down to business.
  - I'm here because ...
  - Explain the project
  - Ask for questions and answer them

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## Listen

- The Most Important Skill
- Try to pose questions that draw the prospect out. Listen for responses.
- Show that you are listening.

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## Dealing with Objections

- Acknowledge them
- Don't debate, but do provide facts
- Correct erroneous information
- Get back on track
- Maintain a common ground

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## The Question

**“Given your past support of (St. Mary’s /so many worthy projects in Grand Junction) and the importance of this project to families and children throughout our community, I hope that you will join with (peers who have given) in this cause. We would be most grateful if you would consider a major gift in the range of (\$ amount) (OPTIONAL: payable over the next X years.)”**

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## What's next?

Having asked the question, what is the next thing you should do?

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## Silence

- Say nothing.
- Look the prospect in the eye and wait.
- Do NOT:
  - Provide an out. "Of course, if you'd rather .."
  - Make excuses.
- If you speak, you lose.

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## What to do if ...

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| "I'll have to think about it."         | "I understand. It's an important decision. When should I stop back?"   |
| "I'm not that interested."             | Provide the facts on those served. "Could I ask you to think some more about it? When would you like me to stop back?"   |
| "I can't possibly give at that level." | <ol style="list-style-type: none"><li>1. Explain payment options</li><li>2. Review importance of participation. Given that, "Would you consider a gift of \$(next lower range)?"</li><li>3. "Please give it some more thought. When should I stop back?"</li></ol> |

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## When you get a firm “No.”

- Be gracious, in person and in writing.
- If no to this project, gather more info.
- If no to the hospital, gather objections.
- There are prospects who will not give to you.

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## 3. After The Ask

Prospect Readiness  
Solicitation Preparation  
Solicitor Readiness

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## AFTER THE ASK

- Immediately thank the potential donor; even if a gift was not made or second meeting is scheduled.
- Send thank you from organization *and* personal thank you from solicitor.
- Confirm follow-up when required.

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## AFTER THE ASK

- Report to staff and/or leadership about outcome, status and next steps.
- Calendar and implement follow-up, if needed.
- Input information into prospect management system: results of meeting, what left behind, agreed to next steps, concerns raised by prospect, etc.

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## 4. You Can Do It!

Practice Session  
Discussion and Questions

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## Reminder: Rules for Asking

- Make your own gift first
- Know your prospect
- Listen to what the prospect says
- Emphasize the prospect's interests
- Ask for a specific gift
- Remain positive and focused
- Counter objections with facts
- Manage the follow-up (pledge card, next appointment, reporting results)

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