

# The Art and Science of Making the Ask

Shaké Sulikyan  
Annual Giving & Fundraising Consultant  
Tri-Valley Nonprofit Alliance Meeting  
October 8, 2015

# Before the Ask

- ▶ Determine capacity
  - Using prospect research to learn as much as you can about them
  
- ▶ Determine interest
  - Cultivate, cultivate, cultivate!
  - Build a genuine relationship through personalized and meaningful interactions

# Before the Ask

- ▶ The 5 W's in preparing for the ask
  - *Who* should ask for the gift?
  - *What* should the donor give to?
  - *Where* and *when* should you ask for the gift?
  - *Why* should the donor give to your organization?

# Before the Ask

- ▶ Preparing for the visit
  - What is the key objective for the meeting?
  - How will the meeting flow?
  - Brief others who will attend the meeting and clearly define roles
  - ROLE PLAY, remember to include various scenarios

# Making the Ask

- ▶ Opening
- ▶ Thank the prospect for their time
- ▶ Present the case
- ▶ Ask for a specific amount (with confidence)
- ▶ LISTEN

# Making the Ask

- ▶ Be prepared to respond
  - “Yes” – Thank the donor and discuss next steps
  - “No” – Possible options
    - Ask for a lesser amount
    - Attempt to find out the rationale behind the no
    - Politely thank the prospect and leave
  - “Let me think about it” – Remember, this is not a “no”
    - Thank them
    - Ask questions
    - Discuss next steps

# Follow-up

- ▶ Thank you letter, regardless of the outcome of the meeting
- ▶ Trip report
- ▶ Follow-through on the next steps discussed during the appointment

# Thank you

- ▶ Questions?
  
- ▶ Shaké Sulikyan  
Annual Giving and Fundraising Consultant  
ssulikyan@hotmail.com  
925-344-7113

# Additional Resources

## ▶ Prospect Research:

- Armando Zumaya
  - <http://www.armandozumaya.com/> - includes a list of freelance prospect researchers under Contacts section
- Prospect Research for Fundraisers by Jennifer J. Filla and Hellen E. Brown
- Association of Professional Researchers for Advancement
  - <http://www.aprahome.org/> - podcasts, webinars, and many other resources

# Additional Resources

- ▶ **Sample Conversation Starters (adapted from Stephanie L. Truesdell)**
  - Tell me about your relationship with our organization.
  - What benefits do/did you receive from being a part of this organization?
  - What are this organization's strengths?
  - Do you have areas of interest at our organization?
  - Would you recommend our organization to a friend? Why? Why not?
  - What are your sources of information about this organization?
  - Rate your interest in this organization. Where do we rank among your non-profit interests?
  - What is your philosophy of giving gifts?
  - Have you served as a volunteer for this organization?
  - What is the best case for annual gifts?
  - Whose responsibility is it to support this organization?
  - What are the top three organizations or causes you support?
  - Have you ever made a capital gift to any organization?
  - What would you consider to be a significant gift to this organization?
  - What would cause you to increase your support to our organization?
  - Would you consider including this organization in your estate plans?
  - How can your relationship with this organization be enhanced?
  - Have you attended events at this organization? How do you rate them?
  - Are there any areas of concern or interest we haven't addressed?

# Additional Resources

## ▶ Sample Responses to Common Objections

- Donor: “I just don’t know if I can do that.” You: “What are your concerns?”
- Donor: “I am not ready to give.” You: “When would be a good time for us to discuss a gift?”
- Donor: “No.” You: “May I ask why?” (Remember, “no” might just mean, not right now.)
- Donor: “Your request is too high.” You: “Thank you for your candor. What would you feel comfortable giving at this time?”
- Donor: “I have to talk to my husband/wife first.” You: “When would it be convenient for us to talk together?”
- Donor: “I don’t give lump sums.” Or, “I don’t make pledges.” You: “How would you prefer to give?” Or, “What would work better for you?”
- Donor: “I need to make sure my spouse is provided for.” You: “What if we talk about gift plans that may help you provide income for your spouse and support our organization too?”
- Donor: “I need time to think about it.” You: “What further information do you need to make your decision?” Or, “I understand completely. Your gift would make a big difference in XXX. I hope that you will consider supporting our organization to the best of your ability. Can I follow up with you in (a week/two weeks, etc) to check-in about your decision?”