

# Preparing For a Really Good “ASK”

The Niagara Fundraisers Network  
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*Creating capacity • Connecting community*

# *Its Simple...the RIGHT way*

- Asking the **RIGHT prospect** (the decision-maker)
- The **RIGHT person** making the ask(the person most likely to get a “yes”)
- For the **RIGHT amount**
- For the **RIGHT cause**
- At the **RIGHT time**
- In the **RIGHT setting** (home, office etc.)

# Understanding Motives

- People give to people (Relationships)
- Personal connection to the cause
- To gain public recognition and approval
- To attain social acceptance
- To alleviate feelings of guilt
- To leave a legacy - be remembered by future generations
- To gain a tax advantage

# 1. *Make Your Pledge First*

- Demonstrate your own commitment through generous, thoughtful and proportionate pledge, made at the beginning of the campaign
- You may get asked how much you gave and you can reply with confidence
- Have and tell your story

## 2. *Be Informed... the message*

- Read and familiarize yourself with the highlights of the case for support and facts and benefits
- Learn about the needs and opportunities. The better you can articulate the objectives and achievements of the case for support and the fundraising campaign, the more successful you will be.

### 3. *Know Your Prospect*

- Memberships, Interests and hobbies
- Philanthropic trends
- Ability to give
- Connection to the project
- Connection to the team

## 4. *Prepare Your Approach*

- Take the time to find out *why* your prospects might be interested in giving
- Every prospect is motivated to give for different reasons
  - A sense of commitment
  - Belief in the cause
  - Connection to an individual

## 5. *Consider A Team Approach*

- Asking for money can be a real challenge
- Teaming up with another volunteer, or staff person, can make the call easier
- Taking a staff member or colleague of the prospect often indicates the importance of the project
- At other times, a more confidential one-on-one visit will work best.
- Each person on the call must have a role



## 6. *See Your Prospect In Person*

- **PEOPLE** give to **PEOPLE**
- Ask *when* you can make an appointment, not *if*
- Your prospects are too important and your time too valuable to waste on less effective means of solicitation
- Meet in a location free of distraction
- Allow plenty of time for discussion
- Remember that your prospect is not obligated to see you

## 7. *Start With Your Best Prospects*

- Make your “easiest” call first
- Early success with your solicitations will increase your confidence and skill as a canvasser
- There is nothing like success to provide momentum and encouragement to your team

## 8. *Keep Your Sights High*

- Research is the key
- You must ask for a specific amount
- Each “ask” is a result of careful research and deliberation by the campaign team
- If you don’t ask, chances are you will not get a donation or you will get a donation less than what the prospect is capable of

# 9. The ASK

- Set appointment for face-to-face solicitation
- Inform first
- Set sights using materials
- Make a specific ask
- Listen
- Answer questions
- Pledge period

# 10. Use Your Tools Of Solicitation

- Prospect profile briefings
- Fact sheets
- Ways of giving (Cash, Gifts in kind, Securities)
- Pledge period
- Recognition (donor categories, naming opportunities)
- Gift chart
- Tax treatment of donations (capital gains)

# 11. *Be An Ambassador*

- Be the first to say thanks
- Send a personal letter of appreciation or note card
- The prospect should be made to feel that all gifts, irrespective of size, are appreciated and will be wisely used
- Campaign office will also send a letter of thanks and a receipt for tax purposes to every donor

# *Common Errors When Asking*

- Not knowing enough about the project or the prospect
- Not deciding on amount of ASK in advance
- Not planning strategy with solicitation team member
- Not making the "ask" face-to-face
- Asking for gift too soon
- Talking too much

# *Common Errors When Asking*

- Not taking the time to follow up and write a personal "thank you"
- Not asking! or Not asking for enough



# Questions?

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