The Art of the Ask

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Some days you feel like this in Major Gifts
Some days this you feel like this in Major Gifts....
But mostly, it’s really like this:
Goals of the session

• To help you understand what constitutes a major gift
• To help you understand the key pieces needed to solicit and land a major gift (and get it again)
• To help you focus your resources to best engage and direct your donor prospects towards a major gift
• Engage in role playing to help understand both how donors and solicitors approach the major gift ask
Giving Cycle

- Identify
- Qualify
- Steward
- Solicit
- Cultivate
What is a Major Gift?

- Institutional perspective - Annual Fund vs Campaign
- Donor perspective – Current and Future
- Golden Rule
Before you make the ask – tools you need

- **Case** – compelling, concise, answers “so what”, tailored to donor
- **Research** – do you know as much as possible? Leave room for discovery in the meeting
- **People** – are you the right person? If not, bring the right person. Be selfless
- **Planning and Timing** – balance your schedule with the donor’s
Do you have the right case?

• Institutional – WHY

• Donor - WHY

• Importance of a comprehensive cultivation, solicitation and stewardship plan – dates and steps (PS you don’t need Tessitura)

• Balance institutional needs with donor interests/needs

• And remember...
Pssst – it’s not your money!
Do you have the right information?

• Do as much research as practical before an ask

• Be open to gathering information and discovering when you are making the ask – and be prepared to change course

• Key to asking for the appropriate amount and appropriate time
Resources for major donor prospect research

• Ask your board, colleagues (ticket office!)
• Google, LinkedIn, Business Journals
• County Records
• DIY gift listing from Annual Reports
• SEC filings through EDGAR
• Real estate info through Zillow
• Paid prospect databases: iWave, ResearchPoint, Hoovers
Fail to Plan? Plan to Fail!

- Start of season (or end of season)
- Plan for each qualified prospect
- Cultivation - 1-6 months (sometimes up to 18 months); 3-7 “touches”
- Solicitation – right time and place with right people
- Stewardship – deliver benefit if any, follow up with results, and then structured non-transactional contact every 2-3 months (phone, email, purposeful conversation at a concert, meal).
Timing is everything

• Have you developed your relationship to the point where you feel comfortable asking
• Do you know what else is going on in the donor’s life (family, trips, business transactions)
• Is there any reason that would prevent you from asking today
• Strike while the iron is hot
• Is there a wrong time to ask?
• Vision is motivating – Neediness and desperation is not – and damages future asks
Getting the appointment

• They know why you are calling – be straightforward
• Is email ever appropriate?
• Go to meet them, never make them come to you
• What about the pre-concert dinner?
• Call the day before to confirm
Do you have the right people in the meeting

• Are you the right person (should be determined in your planning)
• Are you the right person alone?
• Do you need to bring someone from Artistic? The ED? The MD?
• Focus on the needs of the donor
Pre-meeting Preparation

• Write a script
• Meet with volunteer immediately before the meeting to go over the plan (send brief in advance if a complex ask)
• Know who is laying the groundwork and who is asking – be explicit
• Have a conversation about comfortability – let your volunteer know that they can “throw” to you if they feel out of sorts or not right
• Be ready to step in and ask for the $$ if your volunteer can’t put the pin in
Location Location Location

• Quiet - home or restaurant
• Comfortable – for the donor – go to them
• Unhurried – make sure you arrive in good time and have a cushion in case things go long. There is nothing more important than this meeting and must certainly NEVER leave to attend an internal meeting. Those can wait.
Meeting structure

• Thank you. Always first, always genuine
• Conversational, enquiring, solicitous – follow their lead, ask questions
• Pick up on cues and follow them if need be
• Limit your alcohol intake. You need to be nimble
• If conversation does not take you to place of ask naturally, you’ll need to be forthright towards what feels like the natural end of the meeting
The Ask

• Start with a thank you – appreciation
• Acknowledge how important certain part of organization is to them
• What you have been able to do with past support from this individual
• Outline the plans for the future, and how their support will make this possible. Make sure their gift has a tangible effect.
• Ask to renew or increase gift
• Say thank you again!
How should I ask?

Be direct and be genuine
Be respectful
Invite them to support something they love or enjoy

Example!
Go where angels fear to tread

• If you are well prepared, there is no “No”
• Not that much
• Not now

• Even when you get a No, there is information – why they are unhappy with a program, how the organization is managed – it’s all information you can use for stewardship (solve a problem, demonstrate responsiveness, then next ask – increase!)
Piece of cake, right?
If it’s so easy, why doesn’t everyone do it?

• Fear of rejection or failure
• Fear of asking
• Fear of reciprocal ask
Recap ➔ Break ➔ Dealing with Objections

• Know your prospect
• Connect your ask with your prospect’s interests
• Know what you are asking for
• Plan, prepare and practice
• Steward immediately!
Making the ask and dealing with objections

• By far the two things that people fear the most are
  1. Asking and getting a flat no
  2. Asking and getting an objection
• We are going to demonstrate 6 different objections and how to recover.
Objection 1 - Too Much!

• That’s too much money!
• That’s a lot of money
• You’ve mistaken me for Bill Gates
Response to Objection 1

• Soft lob
• Break it up
• Press the point
• Apologize
Objection 2 – Wrong Program

• I don’t know why you are asking me to support that program. I don’t even like/agree with/fund
  • Contemporary music
  • Educational programs
  • Community programming
  • A particular artist or instrument
Response to Objection 2

• Apologize, redirect and re-ask
Objection 3 - Complaint

• I don’t like modern/contemporary/Baroque music! Why do you play so much of it!?
Responses to Objection 3

• Empathize and explain
• Empathize, get an answer and get back to them
• Ask a redirecting question – change the subject
Objection 4 – Either / Or

• I can’t do the Annual Fund and the Campaign – you tell me which is most important and that’s where I’ll put my money
Response to Objection 4

• Explain and offer options to do both
Objection 5 – Not now

• Now is not a good time for me
  • Family problems, health
  • Stock market
  • Job issues/uncertainty
Responses to Objection 5

• Empathize and support
• Probe about a right time
• Back off completely if sounds catastrophic
Objection 6 - Conditional

• I’ll contribute if you can change my seating
• I’ll contribute if you stop posting deficits
• I’ll contribute if you program my favorite composer
• I’ll contribute if you program my composition
Responses to Objection 6

• Repeat and understand
• Repeat and explain
• Repeat and go multi year
• Punt!
Successful Asks:
What is your story?
Thanking & Stewardship: Keep donors connected!

• 24-hour thank you letter
• Thank you phone call from board/sr. staff/orchestra
• Backstage receptions, On-stage rehearsals, Conducting a rehearsal
• Mailed card from orchestra members
• Regular newsletters and reporting
• Excellent customer service, organization wide is essential