



FOCUSED ON FUNDRAISING PRESENTS FOR MARKETSMART:

VIRTUALLY ASK AND CLOSE MAJOR GIFTS[®]

PRESENTED BY:

BENJAMIN R. CASE, CEO/SENIOR CONSULTANT

INTRODUCTION

- A. Speculation and Question One – Why will major donors want to interact virtually with fundraisers?
- B. Speculation and Question Two – Why will nonprofits and fundraisers want to interact virtually with major donors?
- C. Speculation and Question Three – Major gift fundraising will be a multi-channel hybrid determined by who?

OVERARCHING PRINCIPLES

A. Can-do attitude.

B. Mission. Urgency. Agents of light.

C. Do not assume or presume.

OVERARCHING PRINCIPLES

- D. Opportunity to master a more robust channel.
- E. Always give the donor the choice and never violate sound fundraising principles.
- F. Know your donors.

OBSTACLES TO OVERCOME AND REMEDIES

A. Rapport and trust.

B. Social cues and body language.

C. Tech savvy.

OBSTACLES TO OVERCOME AND REMEDIES

D. Distractions.

E. We forget.

OBSTACLES TO OVERCOME AND REMEDIES

F. Solutions:

1. Get yourself comfortable and confident.
2. Intentional interaction.
3. Ask interactional and check-in questions.

OBSTACLES TO OVERCOME AND REMEDIES

F. Solutions:

4. Offer a tech walk-through.

5. “Invite the donor in.”

6. Keep it simple.

SET-UP THE VIRTUAL ASK

- A. Let 'em know you care.

- B. Develop your message for today. General then personalize:
 - 1. Focused.

 - 2. Convey impact donors want.

SET-UP THE VIRTUAL ASK

B. Develop your message for today. General then personalize:

3. Motivational.

4. Memorable/Repeatable.

5. Actionable.

SET-UP THE VIRTUAL ASK

B. Develop your message for today. General then personalize:

6. Message must convey:

a. Mission.

b. Urgency.

SET-UP THE VIRTUAL ASK

C. Identify donors ready to consider major gift:

1. Will evolve.

2. Stay in contact with donors to know where they are.

3. When the donor is ready, have a solid relationship.

SET-UP THE VIRTUAL ASK

D. Consider rating system just for this:

1. Ability.

2. Interest.

3. Readiness.

SET-UP THE VIRTUAL ASK

- E. Have phone discussion with donor to confirm s/he is ready to consider major gift, seek willingness to have virtual meeting. “Pre-ask” more important than ever:
 - 1. Purpose of “Virtual Pre-ask:”
 - a. Determine donor readiness to consider gift.
 - b. Identify and relieve donor concerns.

SET-UP THE VIRTUAL ASK

- E. Have phone discussion with donor to confirm s/he is ready to consider major gift, seek willingness to have virtual meeting. “Pre-ask” more important than ever:
 - 1. Purpose of “Virtual Pre-ask:”
 - c. Hear issues/opportunities donor is considering.
 - d. Understand tech capacity of the donor.

SET-UP THE VIRTUAL ASK

- E. Have phone discussion with donor to confirm s/he is ready to consider major gift, seek willingness to have virtual meeting. “Pre-ask” more important than ever:
 - 1. Purpose of “Virtual Pre-ask:”
 - e. Determine best path forward.
 - f. State urgency.

SET-UP THE VIRTUAL ASK

- E. Have phone discussion with donor to confirm s/he is ready to consider major gift, seek willingness to have virtual meeting. “Pre-ask” more important than ever:
 2. Prior relationship – Start where you left off.

SET-UP THE VIRTUAL ASK

- E. Have phone discussion with donor to confirm s/he is ready to consider major gift, seek willingness to have virtual meeting. “Pre-ask” more important than ever:
 - 3. Donor, but limited prior relationship:
 - a. Have to establish reason for contact.

SET-UP THE VIRTUAL ASK

- E. Have phone discussion with donor to confirm s/he is ready to consider major gift, seek willingness to have virtual meeting. “Pre-ask” more important than ever:
 - 3. Donor, but limited prior relationship:
 - b. Have something to offer/add value, read. Pro-Tip: Connect awareness to opportunity, donor’s desired impact.

SET-UP THE VIRTUAL ASK

- E. Have phone discussion with donor to confirm s/he is ready to consider major gift, seek willingness to have virtual meeting. “Pre-ask” more important than ever:
 - 3. Donor, but limited prior relationship:
 - c. Headline/message matters greatly.
 - d. Be core, not new.

SET-UP THE VIRTUAL ASK

- E. Have phone discussion with donor to confirm s/he is ready to consider major gift, seek willingness to have virtual meeting. “Pre-ask” more important than ever:
 - 3. Donor, but limited prior relationship:
 - e. Keep it short – email and/or phone call.
 - f. May require cultivation step(s).

SET-UP THE VIRTUAL ASK

- E. Have phone discussion with donor to confirm s/he is ready to consider major gift, seek willingness to have virtual meeting. “Pre-ask” more important than ever:
 - 4. “Would you be willing to have a virtual meeting to discuss a gift to the program you are interested in soon, or would it be better to have that meeting in two weeks?”
 - a. Pro-Tip: Do not leave open ended. Set a date for meeting and/or next step.

SET-UP THE VIRTUAL ASK

- E. Have phone discussion with donor to confirm s/he is ready to consider major gift, seek willingness to have virtual meeting. “Pre-ask” more important than ever:
 - 5. Be prepared to state why this can't wait.
 - 6. Never assume a donor is prepared to have this discussion.

SET-UP THE VIRTUAL ASK

- E. Have phone discussion with donor to confirm s/he is ready to consider major gift, seek willingness to have virtual meeting. “Pre-ask” more important than ever:
 7. It is crucial to receive donor’s approval to move forward.
 8. Schedule.

SET-UP THE VIRTUAL ASK

F. Identify who will be in the virtual meeting:

1. Enhance the solicitation experience.
2. Do not confuse.

SET-UP THE VIRTUAL ASK

- G. Consider communication channels to use based on donor relationship, overarching principles, and obstacles.

SET-UP THE VIRTUAL ASK

H. Prepare materials for virtual meeting:

1. PowerPoint (seven slides max).
2. Pre-recorded videos (two minutes max).

SET-UP THE VIRTUAL ASK

H. Prepare materials for virtual meeting:

3. Funding proposal to email prior to the virtual meeting or present at the meeting.
4. Virtual meeting provider. Great rule of thumb – ask if donor has a preference.

SET-UP THE VIRTUAL ASK

- I. Do your detailed preparation:
 1. Not a participant, but rather the leader.
 2. Prepare yourself to look your best:
 - a. Tech prep.
 - b. Camera vs. screen?

SET-UP THE VIRTUAL ASK

1. Do your detailed preparation:
2. Prepare yourself to look your best:
 - c. Speak clearly.
 - d. Energy.

SET-UP THE VIRTUAL ASK

1. Do your detailed preparation:
 2. Prepare your questions.
 3. Prepare actual presentation:
 - a. Personalize.
 - b. Interactive questions: Data—Insight—Question.
 - c. Consider and prepare “check-in questions.”

SET-UP THE VIRTUAL ASK

- I. Do your detailed preparation:
 4. Prepare for likely objections.
 5. Practice, know your answers, and work-arounds.
 6. Consider sending materials before the meeting.
 7. Inform donor who will be in the virtual meeting.

MAKE THE VIRTUAL ASK

- A. Confident – Comfortable – Smile.
- B. Be clear. Keep it simple. Brief, to the point.
- C. Longwinded pitches never good.

MAKE THE VIRTUAL ASK

- D. Set comfortable pace. Conduct meeting as you would any fundraising meeting:
 - 1. Welcome and introductions.
 - 2. Appropriate amount of informal talk to connect:
 - a. What has happened since we last talked?

MAKE THE VIRTUAL ASK

D. Set comfortable pace. Conduct meeting as you would any fundraising meeting:

2. Conversation starts with appropriate amount of informal talk to connect:

b. Story to connect donor to participants?

c. Any immediate issues on donor's mind?

MAKE THE VIRTUAL ASK

D. Set comfortable pace. Conduct meeting as you would any fundraising meeting:

3. Time check?

4. A conversation with a friend/donor/partner/board member/big shot?

MAKE THE VIRTUAL ASK

D. Set comfortable pace. Conduct meeting as you would any fundraising meeting:

5. Review agenda and plan for meeting:

a. State what you want donor to do or know.

b. Purpose of the meeting is to _____?

MAKE THE VIRTUAL ASK

D. Set comfortable pace. Conduct meeting as you would any fundraising meeting:

6. Statement by beneficiary of services (can sign off).

7. Video overview:

a. Pro-Tip: Video, stories, beneficiary statements create emotional engagement.

MAKE THE VIRTUAL ASK

D. Set comfortable pace. Conduct meeting as you would any fundraising meeting:

8. CEO/Program Director presentation:

a. Issue.

b. Opportunity.

c. Plan Overview.

MAKE THE VIRTUAL ASK

D. Set comfortable pace. Conduct meeting as you would any fundraising meeting:

9. Third party endorser statement.

10. Prospect Manager/Fundraiser – Specific ask.

11. Answer questions and objections.

MAKE THE VIRTUAL ASK

D. Set comfortable pace. Conduct meeting as you would any fundraising meeting:

12. Determine and agree to next steps.

13. Summarize – better the summary, more likely follow-up will happen.

MAKE THE VIRTUAL ASK

E. Be thoughtful and intentional in creating interaction:

1. Pro-Tip: Watch for body language and facial cues:

a. Facial cues can be more revealing than body cues.

b. Pro-Tip: Learn to read faces.

c. Ask if you are unsure of what you are seeing.

MAKE THE VIRTUAL ASK

E. Be thoughtful and intentional in creating interaction:

1. Pro-Tip: Watch for body language and facial cues:

d. Be comfortable with silence.

e. NO CAMERA?!?!

MAKE THE VIRTUAL ASK

E. Be thoughtful and intentional in creating interaction:

2. Listen:

- a. People talk because they want to be heard.
- b. Do not interrupt.
- c. Clarify, ask appropriate questions.

MAKE THE VIRTUAL ASK

E. Be thoughtful and intentional in creating interaction:

2. Listen:

d. Comment with appropriate response.

e. Allow time for discussion, questions, and objections.

f. Response times can be delayed.

MAKE THE VIRTUAL ASK

E. Be thoughtful and intentional in creating interaction:

3. Donor wants more info, not ready to commit?

CLOSE THE VIRTUAL ASK

- A. Appropriate communications from CEO/program director/fundraiser/endorser.
- B. Send requested information by agreed upon date.
- C. Send proposal and pledge card if modified/did not send before the virtual meeting.

CLOSE THE VIRTUAL ASK

- D. On agreed upon date, follow-up with a second virtual meeting/phone call to close gift.

- E. Pro-Tip—Evaluate.

CLOSING THOUGHTS

A. We can do this.

B. Highly successful fundraisers know how to adapt and innovate. They find the road to success. They learn how to “virtually ask” as another method to close major gifts successfully.

MARKETSMART



**RAISE MORE MONEY,
MORE EFFICIENTLY,
FOR LESS**

MARKETSMART

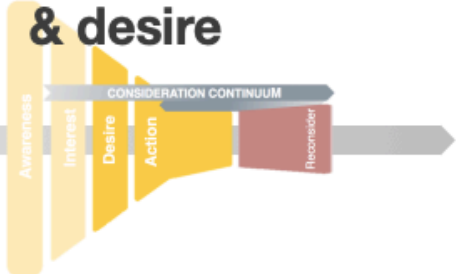
Start with a **donor survey**



Automated emails



Build **interest & desire**



Prioritize outreach



CLOSING THOUGHTS

- C. To request a free 45-minute Strategy Session and learn more about how our coaching can help you and your nonprofit raise more money, please email Arthur at: Arthur@FocusedOnFundraising.com

- D. If you want to receive written and video fundraising tips from Ben, you can register at FocusedOnFundraising.com/Resources

CLOSING THOUGHTS

E. Articles Ben referred to during presentation:

1. <https://www.abstraktmg.com/b2b-appointment-setting/10-tips-for-conducting-a-virtual-b2b-sales-pitch/>
2. <https://hbr.org/2020/04/nonprofit-fundraising-in-the-age-of-coronavirus>
3. <https://development.net/2020/05/28/jim-eskin-connects-charities-to-donors-via-virtual-asking/>
4. <https://npengage.com/nonprofit-fundraising/zoom-donor-meetings-best-practices/>



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