

Solicitation Tips

1. Although it may seem counterintuitive, after you have made the formal "ask," remain silent until the prospect has fully responded. It can feel like the longest 15 seconds or 15 minutes of your life, but let them think it through for themselves. As with all negotiations, he who speaks first loses.
2. When soliciting for a Major Gift, present and propose a specific donation amount based on the donor's giving history and wealth score. Don't suggest it be paid out over a period of years unless you need the option as a negotiating point.
3. Don't disagree with a donor's negativism. Acknowledge it, validate it, then move on!
4. Select words thoughtfully for both the written and spoken presentations:
 - a. Instead of "contribute," substitute the word "invest."
 - b. Don't ask for a gift, extend an invitation. "I would like to invite you to . . ."
 - c. Rather than saying, "Your gift makes a difference," consider verbiage such as "your support has empowered us to....."
 - d. As an alternative to asking, "Would you consider increasing your gift?" explain the importance and impact of an increased gift.: "A 20% increase will help us keep pace with..." or "A 20% increase would provide . . ."

5. Avoid common solicitation errors:

- a. **Not asking for gifts.** When surveyed as to why donors supported a nonprofit, an overwhelming majority stated it was because they were asked to contribute. This is particularly relevant for Major Gifts and gift-in-kind donations.
- b. **Not asking for a large enough amount.** You always have the option of lowering your ask, but you will never be able to increase it. Although research is no substitute for good donor cultivation, take the time to research a donor's giving history, relationship with your nonprofit and wealth score prior to conducting a presentation and submitting a proposal.
- c. **Not talking about donor benefits.** You should have established donor benefits for your particular nonprofit that go beyond the standard tax-deduction prepared in advance, particularly for Major Gifts solicitations. If not, check your nonprofit's bylaws to develop donor benefits in accordance with policies established by the Board. For Major Gifts, donor benefits should be commensurate with your ask and be part of your presentation.
- d. **Not listening—talking too much.** An ideal donor conversation should be 20-80% dialogue with you contributing 20% of the conversation. Truly listen to what a donor or prospective donor is telling you, then validate their point and explain how your nonprofit addresses their concerns. When you talk excessively, you're more likely to introduce a potential objection with too much information. Keep it simple and allow the donor ample time to speak or think out loud.
- e. **Not asking questions.** Ensure that you truly understand the donor, their perspective and their interests by asking probing, open-ended questions in response to their comments prior to your ask. Everyone wants their ideas to be heard and validated. By asking for additional information, you acknowledge the importance of the donor's input as well as affirming its importance.

- f. **Not knowing enough about the prospect before solicitation.** Whenever possible, research the donor prior to solicitation so you know their giving history, capacity, lifecycle and lifetime value, LTV. Donor segmentation and cultivation will guide your pre-solicitation research. Use the inform-engage-invite formula for your solicitation, noting as many relevant details as possible prior to a major ask.
- g. **Not being flexible or having alternatives.** When preparing your presentation include a series of giving options, including extending the gift over a period of time; offering more recognition; or a smaller gift with similar impact. You may not need them, but if the donor says, "No," you have other giving opportunities available.
- h. **Not cultivating the donor before soliciting.** A donor cultivation strategy should be part of your fundraising program. Use donor cultivation events and engagement to learn more about a donor's reasons for giving to a particular cause and/or your nonprofit prior to asking for a significant gift. The more you understand the donor the better you will be able to design a meaningful presentation and inoffensive ask.
- i. **Asking for the gift too soon.** If a donor has accepted your invitation for a meeting, they most likely understand the reason for it. Taking your time with the presentation of your proposal gives it more authenticity and credibility. Investing the time to listen to a donor will prove invaluable in delivering the ask.
- j. **Not knowing enough facts about your organization.** You need to be an expert on your Mission, leadership, programs and social impact.

6. Before making a call, ask yourself three times “why” the prospect should make this gift.
7. Anticipate a prospect’s potential objections, then address them in your presentation before the actual ask.

The best solicitation occurs when the right person is asked for the right gift by the right solicitor at the right time. People don’t have relationships with organizations. They have relationships with people within that organization. People donate to other people, using a nonprofit as a channel to contribute to shared interests and causes.

Cultivation involves a series of well-planned, strategic “moves” to guide the prospect from awareness to interest to involvement and, finally, to commitment. If you effectively cultivate donors that commitment becomes a passion.

When soliciting a married couple, always pay equal attention to both spouses. The most vocal of the two isn’t necessarily the one who will make the final decision.

If a prospect is well cultivated, highly motivated and effectively solicited, they could be expected to contribute 5 percent of their annual income over a 5-year period or 10 percent of their net worth over the same period.

Always make the donor’s best interest your priority. The solicitation is not about your nonprofit or the donation. It’s about the donor.

Identify then prioritize prospects so you spend the most time and engagement where you have the greatest potential for a Major Gift.

Use probing, open-ended questions to learn what's most important to a prospect: "If cost were no object, what would be the ideal solution?" "If we were to establish this program, what should it accomplish?" Asking for their input and ideas is just as important as asking for their dollars.

If you're hesitant to suggest a specific solicitation amount up front, use a chart that identifies levels of giving for a Major Gift. Encourage the prospect to picture themselves among this group of donors. Make it sound like an exclusive privilege because it is.

Never walk away from a rejection without knowing why you were refused. The answer may give clues that will lead to a Major Gift from the donor in future. The answer may also reveal trends in your closing method that need to be changed or improved.

To illustrate donor benefits of particular gift types, share real life examples of how a similar gift is benefiting another donor.