



10 Tips for Major Gift Solicitors

#1 Do your homework

Make sure you are familiar with the services and programs that are offered by the organization. Review your organization's Points of Pride (major accomplishments) and, if possible, be prepared to share a personal experience that impressed you about the special work that the organization provides.

Gather important information about your prospect. Together with other leadership and staff develop a profile of the prospect.

- What are her/his interests?
- What have they contributed to previously?
- What is the largest gift they have ever given?
- Do they give individually or through their company or family foundation?
- Do they have a philanthropic fund with a local Foundation? If so, how large is their fund?
- Are they candidates for estate planning and/or deferred gift discussions?
- Who are their key financial advisors?
- Have they recently sold a business or inherited significant resources?
- How is their business doing?
- Do they have a loved one who may be appropriate for memorializing or honoring with a gift?
- Are there other people who can be supportive with the solicitation who have special relationships with the prospect?
- What are the likely concerns the prospects might raise in the solicitation?
- Determine in advance what would be the best setting to conduct the initial meeting.
- Would it be helpful to have staff, or others participate in the solicitation?
- What materials, hand-outs or visuals would be helpful to have for the solicitation?
- Finally, establish a "rating" for the individual. How much should you ask them to consider as a gift?

2. Leaders Lead

As a leader of the campaign, it is important that you make your own gift prior to soliciting others. It will be easier to obtain a quality gift from your prospects if you are comfortable that your gift is also credible and a quality one, based on your own personal circumstances. The ability to share the fact that you made your gift, when you are soliciting, will give the prospect more confidence in your support and leadership. Prospects will take into consideration what leadership has given, in determining their own gifts. Initial gifts will be "yardsticks" for giving by those who follow.

3. Personalize the Solicitation

Major gift solicitations should not be conducted over the phone. Large gifts are often not closed with one visit. Family members, financial advisors and/or business partners may need to be involved prior to a decision. Obviously, if you know who the key decision-makers are (if they are not your prospect), they should be included in the solicitation meeting. A major part of the success of a solicitation is the chemistry of the relationship between the solicitor(s) and prospect, as well as how one is asked.

If at all possible, at least two solicitors should participate in the solicitation. It demonstrates to the prospect the importance you have put on their gift, it shows that there are others equally committed to the success of the campaign and it provides for different perspectives to be heard. The old saying that two heads are better than one also applies to solicitations. While one person is answering questions or explaining the need, the other person can better observe responses, body language, etc. Evaluating the solicitation and together determining best approaches for follow-up are enhanced with multiple solicitors.

4. The Appointment

The most critical aspect of major gift solicitations is getting the appointment. Be enthusiastic and let the prospect know that you want to share with them some exciting information about the organization, which is a project near and dear to you and that you would like to solicit their advice and support. Make sure that you make the appointment at a time and place that is convenient for both the prospect and solicitors. Also, try to schedule at least 30-45 minutes for the initial meeting.

Try to avoid an environment where others may overhear conversation or where there will be distractions. If the prospect asks if you are looking for money from them be candid and enthusiastic. "Absolutely, I would like to tell you about the organization, and have you join me as a supporter this year, but just as important, we would like to get your input on additional ways we can succeed in our efforts on behalf of this great program which is doing such amazing things." Make it clear that you will be asking for their support.

5. Engage the Prospect

Do not try to close too quickly. Share the vision, services, benefits, points of pride and needs of organization. While informing the prospect of the needs, you are also demonstrating the commitment of leadership. Donors want to be confident that they are giving to organizations with knowledgeable and committed leadership. Enthusiasm is contagious and so is negativity. It's your choice.

6. The Meeting

Take a few minutes to break the ice and to establish a comfortable environment. Introduce yourself and those with you, through your involvement and commitment to the organization and the services it provides. In a concise manner, share with the prospect the value of the organization and what it has accomplished. Refer to the Points of Pride....Emphasize the opportunities for the future based on the new vision and strategic plan for expansion or further development of the organization. Discuss the importance of their participation in addition to their financial support. Your organization needs their advice, expertise, identification of new leadership and introduction to other prospective donors. Once you have shared your enthusiasm about the project and demonstrated the needs, it is time to request the gift.

7. Ask

Using the number that was agreed upon during the rating session, (see item #1) the request can be introduced as follows: "We would appreciate if you would consider a gift of \$ _____ to the campaign." (If there are significant projects/or programs which need to be funded at the level of the request, mention the one or two which you think would appeal to the prospective donor.) PAUSE: Once you have asked for the gift, it is time to be silent and let the prospect respond with questions or other comments. There is no need ever to apologize for asking for a gift. The individuals you are approaching expect you to ask, have likely been asked before by many organizations and have, at times, been solicitors themselves.

8. Questions, Objections and Dialogue

Answer the questions as best you can but do not get into a debate. If you are unsure as to how to properly answer a specific question, tell the prospect you will find out the answer and get back to them or have one of the staff provide them with the details. (Make sure you or staff follow up promptly.) If the donor offers a gift significantly lower than what was requested, you can supportively ask if, by spreading the gift over time, could it be more significant, or if it is structured as a deferred gift, with certain tax benefits, would they consider a larger amount? Do not press if they indicate that what they had offered is the limit to what they want to do.

Thank them as enthusiastically as possible and ask them to complete the pledge card. If they indicate that they want some time to think about it and discuss it with others, thank them for their consideration and request a specific time when you can get back to them for a response. Think of yourself as an enthusiastic salesperson ... you are not "begging". Make sure that you are a good listener as well as a good presenter.

Let your prospect know how important their support is to the campaign and ask them if they can introduce you to others who may also be interested in your important work.

Once the gift is closed, stress the importance of your organizations need for cash by the end of the year. If possible, discuss how and when they will be able to make payment(s). Thank them and have them complete the pledge card.

9. Follow Up

Make sure that appropriate staff and/or leadership are briefed on your solicitation, any new leads, and that there are follow-up communications thanking the prospect ... even if a gift was not made. A handwritten thank you, from the individual who initially set up the appointment and/or was the solicitor, in addition to whatever is sent officially by the organization, is always appreciated. Solicitations should be a positive experience for the prospect. A successful solicitation can set the stage for future involvement. An unsuccessful solicitation can turn off a donor to the campaign as well as to future potential for support.

10. Summary

Keep in mind that people are more likely to contribute to make dreams happen than to solve problems. Success equals connecting the donor to the organization in their heart first and only then, ... through their pockets.