

Engaging Conversations

Moving Donors Toward YES!




Presenter





- Founded InterAction, Inc. in 1993 as a consulting firm, specializing in improving communication effectiveness.
- Master's Degree in Organizational Communication from Purdue University, and a B.S. in Speech Communication from Southern Illinois University
- In high demand as a speaker, consultant and trainer for Fortune 100 clients
- Has personally trained more than 5,000 people in fundraising, public speaking, customer-focused sales, performance management and team building
- Carol has been Stelter's Relationship Building Workshop facilitator for more than 20 years

Carol Moreland
President
InterAction, Inc.






Today's Objectives

- Make compelling requests for meetings
- Use the 3 Es (Engage, Educate, Excite)
- Use questions to explore possibilities
- Stay in the Moment
- Pave the way for another meeting


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Consider This . . .

- How do you feel about soliciting and asking for money?
 - ✓ Confident
 - ✓ Hopeful
 - ✓ Unsure
 - ✓ Stressed
 - ✓ Other



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Your Answers Reflect Your Style



Style Preference	Approach to Asking for \$
<p>D Style</p>	<p>Focus on making the most of your time and getting a return on your investment</p> <p>Motto – “Get to the point”</p>
<p>I Style</p>	<p>Rely on previous friendly interactions get a positive response</p> <p>Motto – “Kill them with kindness”</p>
<p>S Style</p>	<p>Take things one step at a time so everyone stays in their comfort zone</p> <p>Motto – “Respect their privacy”</p>
<p>C Style</p>	<p>Worry that you have not prepared enough and need more information</p> <p>Motto – “Don’t ask until you’re sure to get a YES”</p>


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People View the Same Situation Differently



- People have their own GOOD reasons for what they do
- Their reasons may be different than yours
- People make decisions according to their preferred behavior style
- There are NO right or wrong styles


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People Reading



Not for labeling, but for understanding

Helps us predict their goals and reactions

Everyone is a blend of styles

We can't be sure of others' styles until they tell/show us

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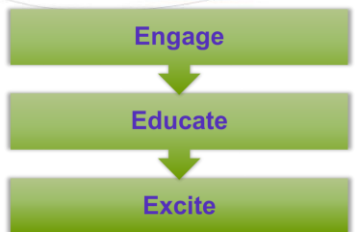
Observe Actual Behavior

- Body Language
- Tone of Voice
- Facial Expression/Eye Contact
- Choice of Words



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Use the 3 Es



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What Would it Take?

- Think of a non-profit organization (other than yours) you're connected with (e.g., consistent donor, volunteer, participant)
- Imagine that someone from that organization calls you on the phone and asks for a 1 hour meeting
- **What would the caller need to say to get you to meet for 1 hour?**


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Compelling Reasons to Meet



Specific, donor-centered purpose:

- The reason I'd like to meet is to ...
 - ✓ get your reaction/feedback/ideas on ... (D,I)
 - ✓ update you on an exciting event we're planning (I)
 - ✓ introduce you to ... (I)
 - ✓ thank you for your support, and show you how your involvement is helping families in our region (S)
 - ✓ introduce myself and answer any questions you have about ... (C, D)
 - ✓ follow up on a mailer we sent last week (C, S)


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Principles of "Friend Raising"

- Relationship building is not just ASKING for \$
- Key Supporters are looking for meaningful opportunities to make a difference
- The ultimate goal: match the Key Supporter's philanthropic passion with your mission


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Questions are Warmer than Statements

- Shows you're interested
- Encourages others to talk
- Uncovers feelings, perceptions
- Builds trust
- Helps you listen



Donors should talk 65% of the time

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Engage a Supporter at an Event by Asking. . .

- Why did you decide to attend this event?
- What would the answer tell you that would be good to know?

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Questions that Break the Ice

Personal Background Information

- Where are you from originally?
 - What was it like growing up there?
- How did you choose your life's work?
- How did you first get interested in our organization?
 - Is there an event in your life that made a big impact?

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Perception of Your Organization

- What do you like about what we're doing?
- What makes you feel best about being involved with us?
- How has your affiliation with us changed over the years?
- What do you want our organization to look like in the future?
- What kind of experience do you want others to have with our organization?

Philanthropic Interests

- What has been your most meaningful experience related to philanthropy?
- What other organizations do you support?
 - Why?
- What kind of impact do you want your gifts to have?
- How do you encourage your children and grandchildren to make a difference?
- If this were your project, what steps would you take to get it done?

Listen and Rephrase

- Listen Actively
- Show your interest



Tools for Active Listening

1. Maintain Eye Contact
2. Ask follow up Questions
3. Rephrase (in your own words)

Follow Up Questions

- Really? Tell me more.
- What makes you say that?
- That's interesting. (Pause)
- Anything else?



Summarize and Rephrase

Summarize (occasionally) in your own words

- *"It sounds like you've thought a lot about that."*
- *"So you're interested in our advocacy work?"*
- *"I can tell by what you're saying that education is really important to you."*

Use the 3 Es

- Engage
 - ✓ Have a donor centered purpose
 - ✓ Ask good questions to uncover facts and feelings
 - ✓ Listen actively
- Educate
- Excite




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Use the 3 Es

When the time is right . . . Educate



- Talk about the right things at the right time
- Show them how their efforts are making a difference
- Be a “bridge” to the organization – help them find the information they want

- Engage
- Excite


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Excite Donors by Showing How They are Making a Difference

1. Restate what you've heard them say:
I've heard you say how important it is to keep families close during long illnesses.
2. Show how their gift(s) helped:
Here's how your generous gift is helping. We've been able to add space to include play areas for siblings to make it easier on parents during long hospital stays.
3. Briefly explain new plans:
Going forward we're planning to add additional kitchen facilities, as well.


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Listen for Buying Signals

<p>What the Donor Might Say:</p> <ul style="list-style-type: none"> ▪ "Who else is involved with that?" ▪ "How much would that cost?" ▪ "I wish I could make that happen." 	<p>When you hear these – DRILL DOWN</p> <ul style="list-style-type: none"> ▪ Let the donor tell why it's appealing ▪ Reinforce the desire <ul style="list-style-type: none"> - <i>"That's a wonderful idea!"</i>
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Document and Share Results

- Record important information uncovered during meetings. (Enter in the Donor Database)
- Share meeting results with your team
- Strategize and plan next steps
 - ✓ Who?
 - ✓ When?
 - ✓ Where?
 - ✓ How much?


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To Sum It Up

- Engage, Educate and Excite the Supporter
 - ✓ Read Behavior by observing and listening
 - ✓ Prepare and ask good questions
 - ✓ Actively listen
 - ✓ Find out why they're involved/what they want in return
 - ✓ Make progress, but don't push
- What should be the next MOVE?
 - ✓ Document your progress and plan each meeting


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Questions?



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Additional Questions

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Thank You!