






AGENDA

1. Assumptions, Abundance, Recaps
2. The Set-Up and Case of Support
3. Making the BIG ASK
4. Appreciation and Next Steps
5. Q&A!



HOLY HANNAH! LOOK AT ALL THAT WEALTH TRANSFERING!

2007 – 2061
\$60 TRILLION up
for grabs
Charities = \$27
trillion

\$310 BILLION in ND
alone.
1/3 to Charity
projected



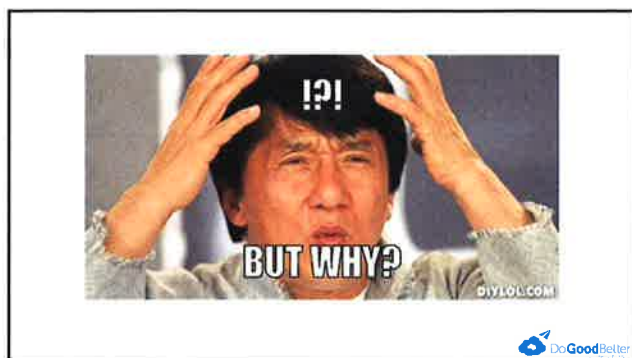
Plan for the Plans

ESTATE PLANS:

70% of individuals
who have a will or
estate plan, **DO**
NOT have any
charity attached
to them









Messenger > Mission

- GREAT MISSIONS DON'T ALWAYS MAKE GREAT MONEY
- WHAT IS YOUR ELEVATOR PITCH?





Cue OOHS
and AAAHHS

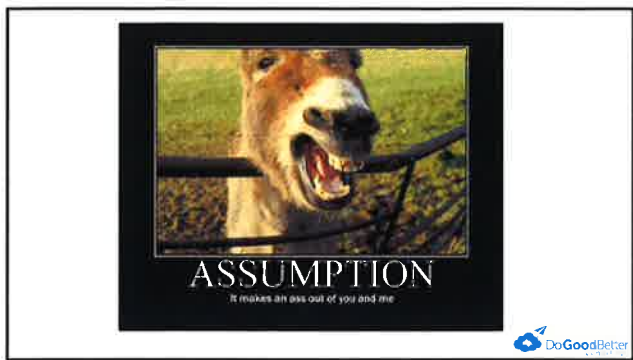




Your Fundraising 5 Step Plan

1. Tell your story
2. Small Gift Activation
3. Ignite a Spark with an Event
4. Build a long Term Relationship
5. Acquire that Major/Legacy Gift









THINK BIG GIFTS!



WE NEED TO MAKE GOALS
AND STOP CHASING OUR
TAILS



I MEAN THIS LITERALLY

DIYLOL.COM



Playing the LONG GAME

1. Current year success sets up future
2. Curating Relationships
3. Elevating Relationships
4. Purposeful Impact Stories
5. Always Be Connecting





DoGoodBetter

MAJOR GIFT REMINDERS!

1. Average Major gift = 18-24 months
2. Average Fundraiser = 15 months
3. Board = Reasonable Expectations
4. Messenger > Message
5. ALWAYS MAKE AN ASK

DoGoodBetter



DoGoodBetter



Sponsorship vs. Personal Gifts



Businesses...

1. Typically GET something and expect something
2. Does it benefit the company?
3. Easy YES/NO – less hard feelings
4. Less research work
5. Exposure > Impact



Individuals...

1. Typically NOT looking for something in return
2. Their need to feel good
3. Sense of urgency works well
4. Impact Stories are CRUCIAL
5. Long term Investment

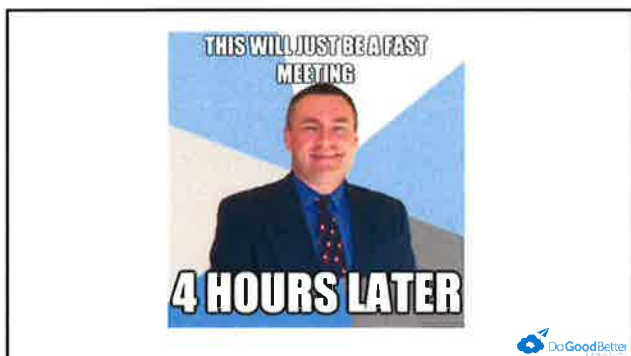


Prep, Meet, Recap, Repeat













DoGoodBetter

How Can I Help?

1. Always have a donor in the hopper
2. Always be prepared to ask and close a gift
3. Always be prepared to say what you need!

DoGoodBetter

"How can I help?"

DoGoodBetter

\$2,500 would help...



\$5,000 would help...



\$10,000 would help...



\$25,000 would help...



\$50,000 would help...



THINK BIG GIFTS!



\$_____ would help...





Gesture:

Pinching bridge of nose, eyes closed



Gesture:

Tapping or Drumming Fingers



Gesture:

Steepled Fingers



Gesture:

Quickly Tilted Head



Gesture:
Stroking Chin





Things to Prep

1. Background Bio, gift and meeting history, additional research
2. Organization FAQ sheet
3. Examples of successes
4. TALKING POINTS





Is Your Donor Ready?

1. Capacity
2. Alignment
3. Ask



Face to Face Meeting Structure

1. Build Rapport
2. Honest with your goals
3. Uncover / Confirm Interests
4. Present your Case
5. Make the Ask!
6. Objections?
7. End that meeting!



Build Rapport

1. Chit Chat Time!
2. Friends, Job, Family, etc...
3. Remember, you KNOW them



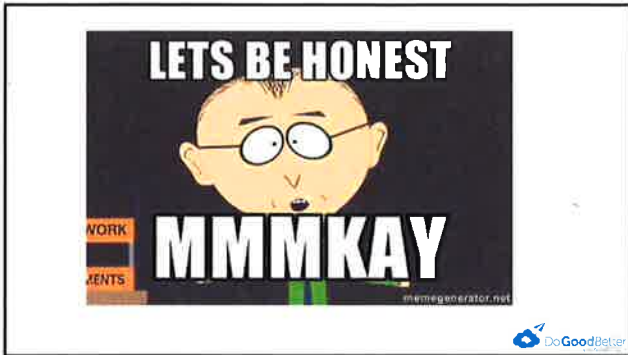
**i'm just here
for the chit chat**



Honest with Your Goals

1. Why are you meeting?
2. Confirmation of being on the same page!
3. Great segue...





Confirm their Interests!

1. Confirm why they care
2. Recent experience with your organization or cause
3. Be prepared to ask questions



Mini Presentation Time!

1. Impact Stories
2. What their support would mean for your organization
3. What their gift could help accomplish
4. Be brief!





Ask for the Gift!

1. Take a deep breath
2. Look deep into their eyes
3. Be clear
4. Speak slowly
5. ASK!









Objections?

1. Prep from past conversations
2. Money. Its usually about money.





"That's way more than I can afford."



"I can't give to you right now."



"I need to ask my wife/husband."



High Five! We're DONE!

1. Restate agreements
2. Be clear and get signatures
3. Its OK to hug!





Document! Document! Document!

1. So. Many. Notes
2. Quickly now!
3. Download to the team/boss





Wait...You're Not Ready?





"Phil, I'm learning how to meet with donors and ask in person...."



"If you want advice,
ask for money.
If you want money,
ask for advice"



**YOU CAN
BE DOPE
AND HUMBLE
AT THE
SAME TIME**





Let's Ask Questions
About All Things
Fundraising!!!





DoGoodBetterConsulting.com | @FundraisingDad
