

## Major gifts visit: Structuring the conversation

**1. Build rapport.** Chat a little. Start with topics that have no bearing on your organization or fundraising campaign. “How’s your job? What are your kids doing these days? I notice you’ve got your garden in; what are you growing this year?” Don’t spend a lot of time on idle chatter – the meeting might get away from you – but it’s good manners to ease into the topic at hand.

**2. State your goals for the meeting.** This step is optional but recommended. You might say, “Margarita, I’ve come today with three things on my mind. One, I’m here to tell you about our work. Two, I want to learn more about you and your interests. Three, it’s my responsibility to ask for your financial support. To tell you the truth, I’d like to know why you’re interested in our organization, so let’s start there.” This provides a clean segue into the next item.

**3. Uncover the person’s needs and interests.** Find out why he or she cares about your work. For a donor, the questions might be, “You gave us \$500 last year, which is a big gift for us. Why did you do it? Why do you care about this issue?” When talking with a prospect who is considering a first gift, perhaps you can ask, “What’s your experience with our work? Why does it interest you?” Initiate a dialogue by asking questions. Get the prospect talking.

**4. Present your organization: your goals, programs, and financial needs.** Tell stories. Where relevant, cite statistics. Keep it brief; don’t overwhelm the person with a blow-by-blow description of your 14-point strategic plan. If you have visuals that tell your story – maps, graphs, photos, charts, or site plans – this is an opportunity to use them. Encourage questions.

**5. Ask for the gift.** Be clear, explicit, and straightforward. “Sally, as I mentioned in the letter, we were hoping you’d consider a gift of \$1,000 to support our work. It would mean a lot to us. What do you say?” As an alternative, “As I mentioned in the letter, we’re looking for gifts of between \$500 and \$5,000. I appreciate that this is a wide range, and to be honest, we don’t know the appropriate amount to ask of you. How much would you like to give?”

Once you’ve asked for the gift, wait – *keep your mouth closed*. Don’t make excuses or start to backpedal before the donor has a chance to respond. Just sit quietly and wait.

**6. Deal with any objections.** Some of the objections you answered by phone are likely to come up again now. Think in advance about these objections and how you might respond. Practice your answers and bring notes to the meeting. For example, if the person says, “You’re asking for more than I can afford,” you can reply, “How much would you like to give?” In response to, “I’m unable to give right now,” you could say, “Do you want to make a pledge now and pay later? If that works for you, it works for us.” Most of these responses are nothing more than common sense, so:

- Take a breath,
- Ask yourself, “What’s the logical response to this concern?”
- Respond accordingly.

**7. Close the meeting.** Restate any agreements you’ve made so both parties leave the room with the same expectations. Once again, be clear, explicit and straightforward.