

Making the ask.

*Wait -what, you say
that's the easy part?"*

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Hello My Name Is
Tom Brady



Quarterback

New England Patriots



Christopher G. Thomas

Senior Director,
Principal partnerships
American cancer Society

Why we Love our Work

Agenda -

- My only Major Gift Joke
- Why we Love our work
- Why are people afraid to ask
- Making the ask the easy part
- Guiding principle
- The right donors
- Overview and Process
- Making the Ask
 - The Appointment
 - Conquering the fear
 - The anatomy of the ask
- What's next - Takeaways

Why are we afraid to ask

Fear of rejection

Being pushy

Not having all the answers

Indebted (volunteers)

Closing awkward

The ask – Making it the easy part

Mentality – the guiding principle

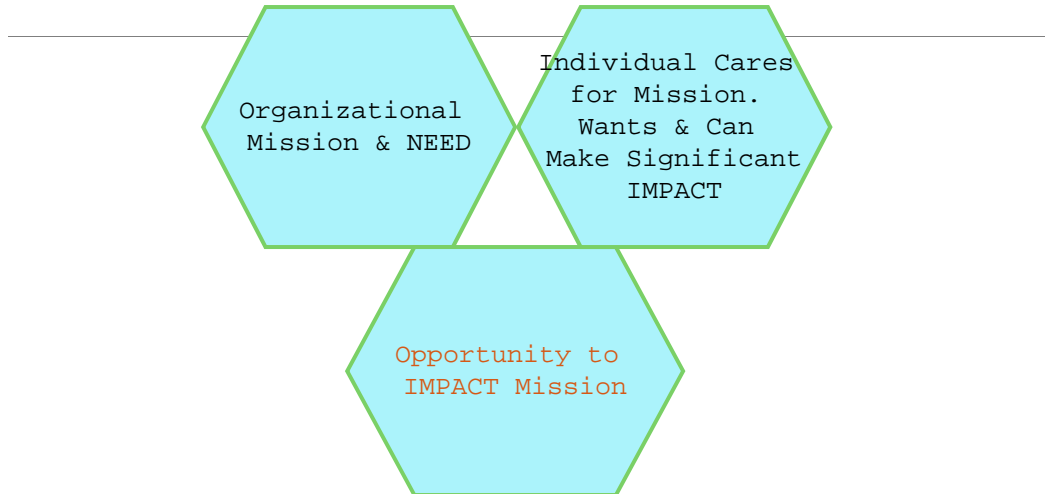
The right donors

Process of getting to ask

Its about the mission

Not personal

Mentality – The Guiding Principle

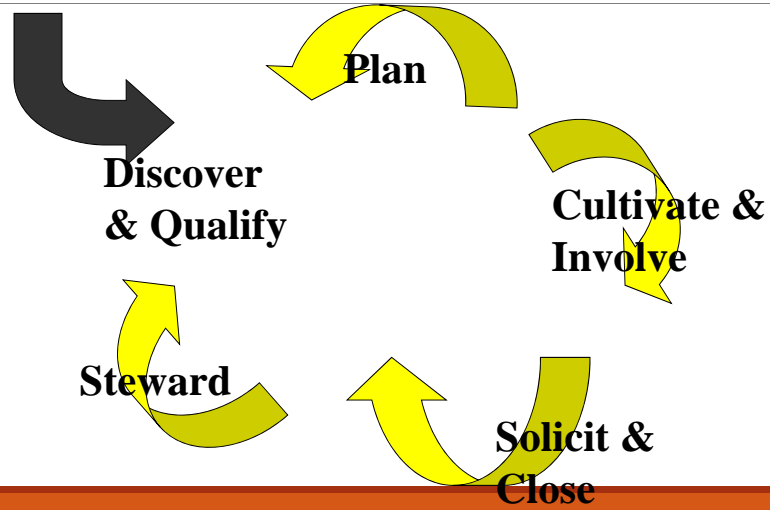


The right donor - KEY FEATURES

Prospect Evaluation Grid

Financial Capability		Prospect Evaluation Grid								
		1	2	3	4	5	6	7	8	9
HIGH	9	Unlikely Prospect 1/9								Ideal Prospect 9/9
	8									
	7									
	6						Major Gift Prospects 6/6			
	5					Target Prospects 5/5				
LOW	4									
	3									
	2									
	1									Dedicated Volunteer 9/1
		LOW								HIGH
		Current Interest or Involvement								

Building Donor Relationships



Building Donor Relationships The Cycle of Giving



Making the Ask

- The appointment
- Conquering the fear
- Yes it is time to ask
- Internal ask agenda

Appointment

Can someone open the door

Think about location – go where most comfortable for donor

Befriend the gate keeper

Involve spouse partner

Plan ample time

Set a specific time and length of time. May I have 30 minutes of your time

Use volunteers/ peers – where possible but always be prepared to make the ask yourself

Making the Ask - Conquering the fear

Go in positive

Remember it's the mission

Be sincere

Remember - The money is not for you it is for the mission

In the end it is on the donors timeframe not yours

Create an internal agenda

Yes – it is time to make the ask

Make ask

- Opening
 - If you can decide how best to sit
 - Open with some personal discussions
 - Make the case – again
 - Stress the mission/impact not the amount
 - Use volunteers/ peers – where possible but always be prepared to make the ask yourself
- Ask
 - Ask for a specific amount (use the word consider)
 - Reference others involved
 - stop and wait – let the prospect speak first
- Objections
 - Focus on any objections or questions
 - Don't take it personally
 - Be prepared for yes/maybe/no
- Next Steps
 - Never leave without a defined next step – set a time to follow up
 - Don't leave the paperwork till you have an answer
 - Send a personal follow up note

Making the Ask - Agenda

Personal notes on donor

Updates since we discussed.

- *Overview of Ovarian Cancer Consortium effort progress*
- *Highlight that her interest and potential support has spurred us to this point*

Challenge Grant for 5 Million

- *Potential partners*
- *Consortium in Ovarian Cancer (handout)*

Discussion on areas of possible support

- *Challenge grant to match by end of 2017 - 2.5 million*
- *Would she fund one year – scheduled over 4 years*

Stop and Listen

Next steps

- *Yes – next steps /pledge or full amount*
- *Pledge form*

Maybe

- *Who else to bring to discussion?*
- *Possible discussion with another donor who did similar gift*
- *Ask what else she would need to know to get to yes*

No

- *Qualify – amount/timing/project*
- *Would she consider funding a RSG (smaller ask)*
- *Would she consider funding a New Professorship*

Things you can write down and take away

Plan each donor like a special event

Always have an ask amount in the back of your mind in ANY meeting

Do an internal agenda

All these rules can be broken – that is the fun

Don't be afraid to ask for too much – if you have done your research

- *You would not respect me in the morning ☹*

Have planned strategy for yes/no/maybe

Plan ample time – respect donors time – but don't schedule your next meeting to close to an ask meeting

A no is never a no till it is qualified – was it the mission, project, timing, amount

Make ask

- *Ask for a specific amount (use the work consider)*
- *stop and wait – let the prospect speak first*
- *Stress the mission/impact not the amount*
- *Focus on any objections or questions*
- *Don't take it personally*
- *Reference others involved*
- *Never leave without a defined next step – set a time to follow up*
- *Don't leave the paperwork till you have an answer*

Use volunteers/ peers – where possible but always be prepared to make the ask yourself

Questions and Thanks you

