



# Annual Giving: Making the Ask

BENTZ  
WHALEY  
FLESSNER

**Presented by:**

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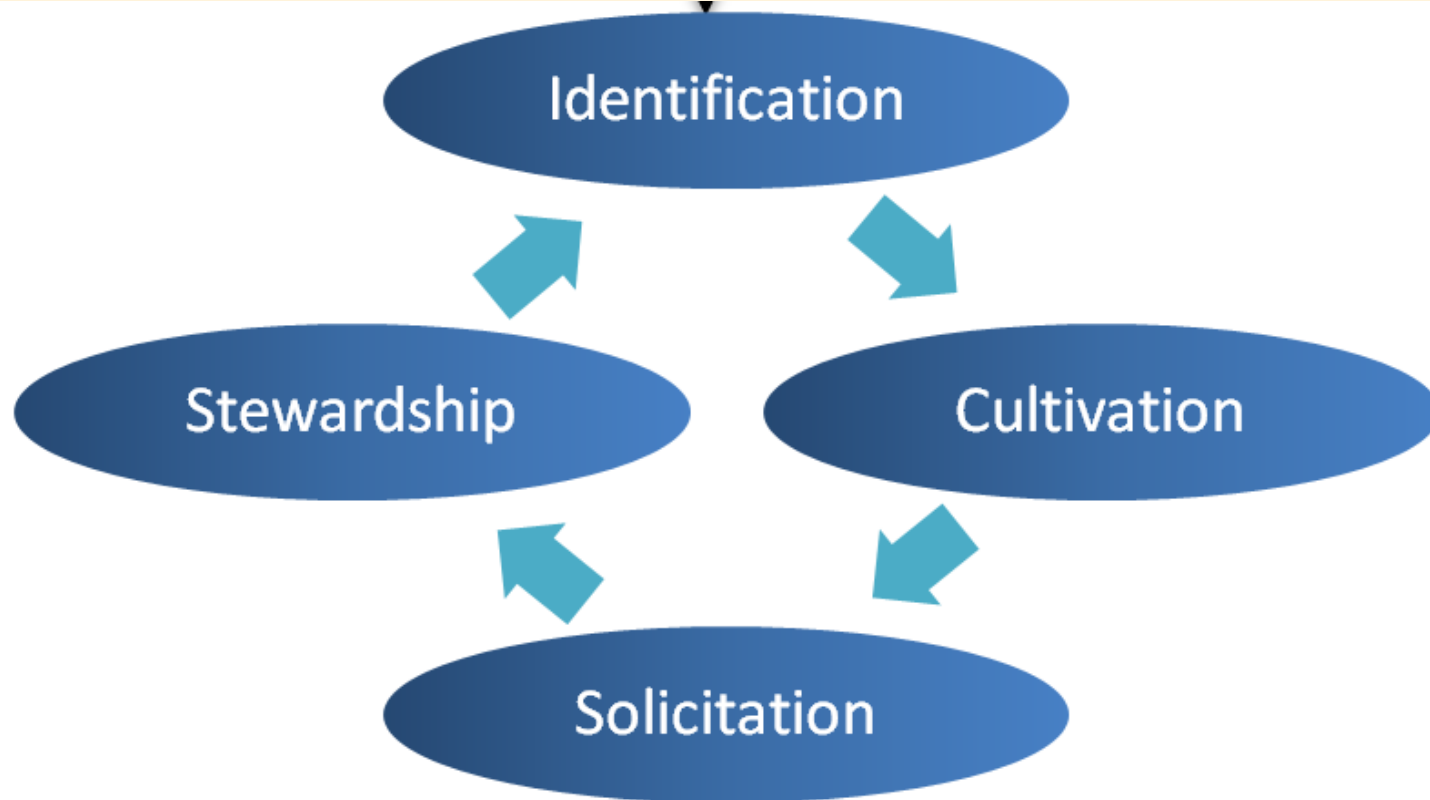
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# Challenges for Annual Giving Solicitation

- **Maximizing fast solicitations in a no-cultivation world!**
- **Managing the expectations of the role – skill development, knowledge of the broader plan, and being viewed as integral to the program.**
- **Multi-tasking – The challenge of travel, management, and everything else you have to do!**

# The Solicitation Cycle



# **1. Maximizing Our Outcomes Social Styles**

# Personality Styles – Myers Briggs

- **What 's your personality style?**

**This is the test we all know most commonly.**

**Favorite World:            Extrovert vs. Introvert**

**Information:                Sensing or Intuition**

**Decisions:                  Thinking or Feeling**

**Structure:                  Judging or Perceiving**

# The Myers-Briggs in Development

Who is the Myers-Briggs focused on?

<b>ISTJ</b>	<b>ISFJ</b>	<b>INFJ</b>	<b>INTJ</b>
<b>ISTP</b>	<b>ISFP</b>	<b>INFP</b>	<b>INTP</b>
<b>ESTP</b>	<b>ESFP</b>	<b>ENFP</b>	<b>ENTP</b>
<b>ESTJ</b>	<b>ESFJ</b>	<b>ENFJ</b>	<b>ENTJ</b>

How does it help us?

# Social Styles

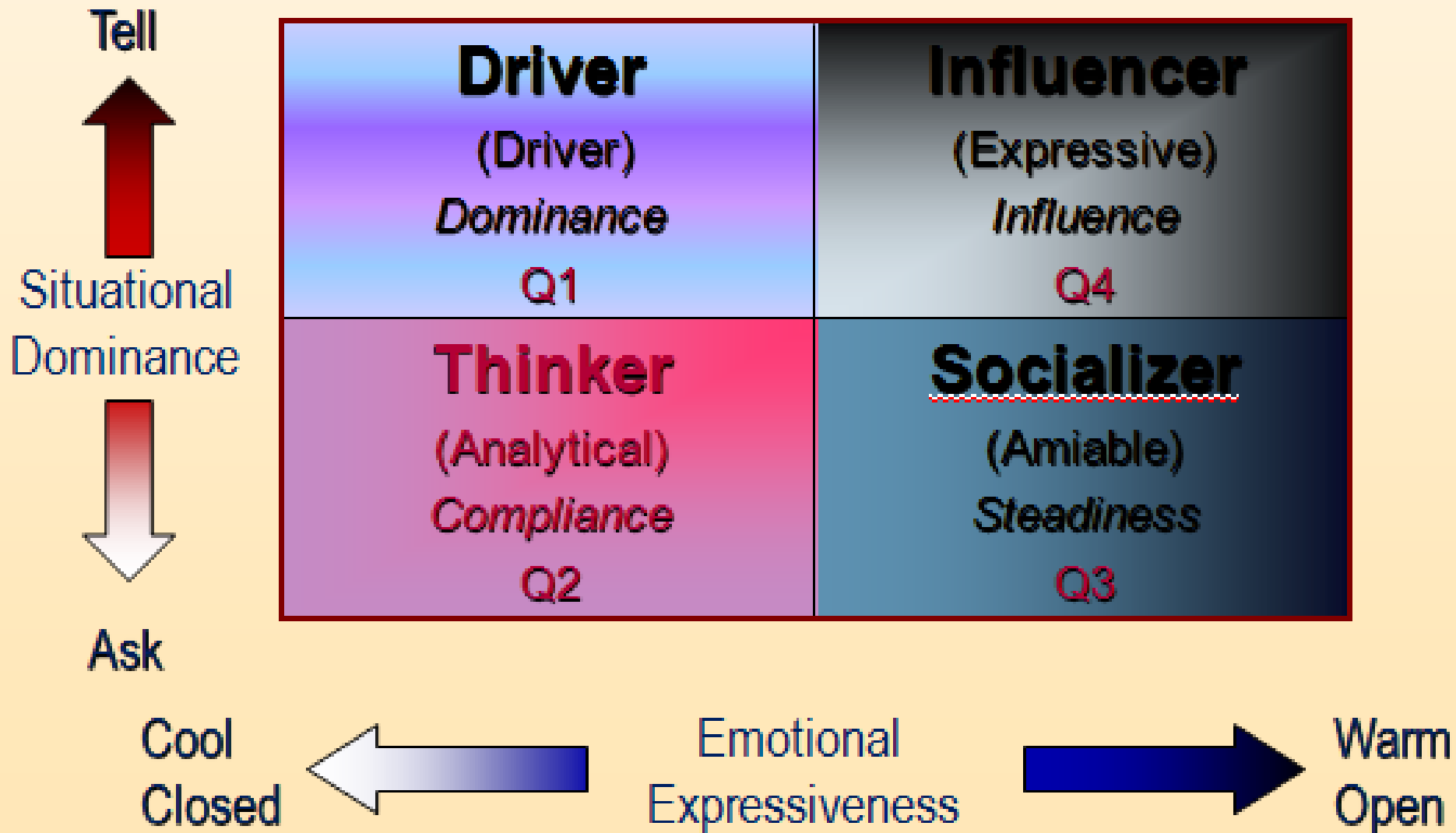
- **Understand the nature of social styles**
- **Identify the characteristics of the styles**
- **Utilize social styles to advance relationships.**

# Social Styles

**“The underlying theory of social style is that each person has his or her own ‘typical’ behavior.”**

**- Carl Jung**





# Driver – Observable Traits

- Just do it now!
- Get to the point
- What's the bottom line?
- Everything is Win/Lose—and I'm going to win!
- Task oriented
- Like to take action

What does this donor visit look like? Feel like?

# Influencer/Expressive

- Colorful, dramatic
- What's possible?
- What's next? Future oriented
- Let's get started —soon.
- (Whoops forgot the deadline!)
- Leap before you look.
- Don't bug me with rules, limits, details

What does this donor visit look like? Feel like?

# Socializer/Amiable

- Want everyone to be happy
- Avoid hurting feelings
- Think well of others
- Like support from others
- Like to help others
- When pushed too often, will hold a grudge

What does this donor visit look like? Feel like?

# Thinker/Analytical

- Thinkers
- Detail oriented
- Methodical
- Consistent
- Creatures of habit
- But what if?
- Like rules, not surprises

What does this donor visit look like? Feel like?

# Social Style Summary

	<b>ANALYTICAL</b>	<b>AMIABLE</b>	<b>DRIVER</b>	<b>EXPRESSIVE</b>
<b>PRIMARY ASSET</b>	Systematic	Supportive	Controlling	Energizing
<b>BACK-UP BEHAVIOR</b>	Avoiding	Acquiescing	Autocratic	Attacking
<b>FOR GROWTH NEEDS TO</b>	Decide	Initiate	Listen	Check
<b>MEASURE OF PERSONAL VALUE</b>	Respect	Attention	Results	Recognition
<b>NEEDS CLIMATE THAT LET THEM SAVE</b>	Describes	Process	Responds	Collaborates
<b>MAKE EFFORT TO BE</b>	Face	Relationships	Time	Effort
<b>SUPPORT THEIR STRESS BENEFITS THEIR ANSWER</b>	Accurate	Cooperative	Efficient	Interesting
<b>FOR DECISIONS GIVE THEM</b>	Principles/Thinking	Relationships/Feelings	Conclusions/Actions	Visions/Intuitions
<b>FOLLOW-UP WITH</b>	HOW problem is solved	WHY solution is best	WHAT solution will do	Who else has used
	Evidence/Service	Assurances/Guarantees	Options/Probabilities	Testimony/Incentives
	Service	Support	Results	Attention

# Personality Styles: Influencing Others

## Driver

Force of Character  
Persistence  
Strong Persuasiveness

## Expressive

Praise and Favors  
Generating Enthusiasm  
Inspiration

## Analytical

Factual Data  
Logical Arguments  
Predetermined Manner/Plan

## Amiable

Personal Relationships  
Performing Services  
Accommodation

# Style Modification

## **Increase Assertiveness (Amiable & Analytical)**

- Get to the point
- Initiate conversation

## **Decrease Assertiveness (Driver & Expressive)**

- Ask for opinions
- Do not interrupt

## **Increase Responsiveness (Analytic & Driver)**

- Socialize
- Verbalize feelings

## **Decrease Responsiveness (Amiable and Expressive)**

- Restrain enthusiasm
- Make decisions based on fact



# Exercise

Name	Personality Style	Modification Necessary
1.		
2.		
3.		

## **2. Personal Skill Sets**

# Interviewing Skills

- Can you interview a prospect without interrogating?
- Can you build a quick personal connection and keep the prospect focused on the school?
- Can you keep the prospect talking at least 60% of the time?
- Can you effectively do discovery work to make the next visit easier?

# Credentialing Yourself

**People are inherently tribal...we constantly seek small groups. How can you put them yourself in their group?**

**Create an instant affinity.**

- **Alum vs. non-alum**
- **Who do you both know?**
- **Shared experiences.**



# The Golden Moment

- How prepared are you for all the scenarios?
  - What if they offer a small gift?
  - What if they say they won't give?
- What critical issues exist in your relationship with this prospect?
- What is the answer?



*Being prepared for these moments can make all the difference.*

# Preparation

## **Prepare for the meeting...but not too much.**

- Review the basic information available on your system.
- Remember your task—let your prospect tell you his or her story.
- Be ready to talk about anything—let them determine the subjects.
- Know the key talking points about your college.

# Exercise: Prospect Information

Name	Critical Information	Source
1.		
2.		
3.		

# Have you “Rehearsed”!

- Role playing
  - Solo
  - Team
- Is there a decision tree for the meeting?
- Have we identified success?
- Needed material – follow up?

*Preparing for what messages should be delivered should take at least as long as the meeting!*



# Starting Over?

- What happened on our visit?
  - If reached a “no” why?
    - Wrong project?
    - Wrong timing?
    - Wrong amount?
- Spending the time to evaluate.
- “Throwing good time after bad”

# Be the Clock

- Donors and prospective donors will advance at individual speeds.
  - Do you know the signs?
  - Can you set the pace for them?
- Timing matters to capture the momentum.
- The lesson of John!



# Reaching the Best Prospects

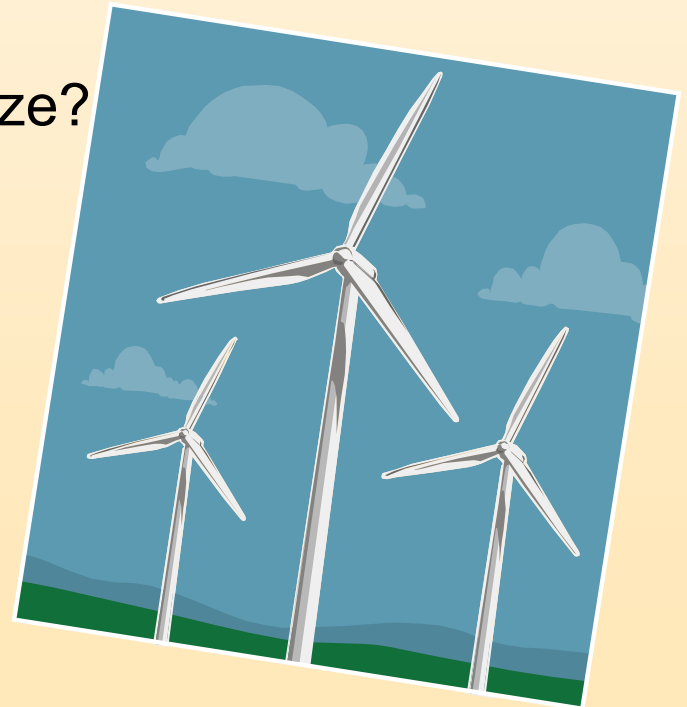
- Cold calling – Consistent estimates are that nearly 20 calls are made for 1 meeting to be scheduled.
- Spending time where there are results.
  - Cultivation events.
  - “Campus” events.
- “The Accidental Gift Officer”

# Finding Your Moment of Zen

- Use annual giving prospect management meetings to discuss prospects.
- Schedule prospect calling time.
- What do you need to do to re-energize?

“Never, never, never give up!”

- Winston Churchill





**Thank you**