



THREE SIMPLE QUESTIONS THAT GET DONORS TO GIVE *A SMART Practices Report from Bristol Strategy Group*

THREE SIMPLE QUESTIONS THAT GET DONORS TO GIVE

Conventional wisdom reminds us to listen more than we talk when we're out there cultivating donors. But are we "listening" for the right information? Do we know what answers we want to hear? In the world of professional fundraising, the questions we ask are as important as, and maybe more important than, the words we are listening to. We need to ask questions that give us the answers we need to hear. Asking the right questions the right way changes the donor-cultivation game in significant ways, to the advantage of both parties.

This report explores a way to ask the *right* questions, questions that help the donor prospect reveal her deep needs, concerns and expectations. Such questions provoke a dialog between donor and fundraiser that establishes trust and rapport, giving prospects permission to speak at length about themselves, their careers, and their charitable motivations, philosophies and expectations. With such insights, you and your fundraising team can listen for the answers that tell whether the donor justifies the investment of your time and attention. The right questions help the prospect tell you how – and whether – to cultivate them.

INTRODUCING THE THREE SIMPLE QUESTIONS

- ***The Success Question: "What do you want to achieve?"***
- ***The Frustration Question: "What do you want to avoid?"***
- ***The "Right-Charity" Question: "What helps you decide which charities to support?"***

This report shows why these simple questions work, how to prepare yourself by understanding donors' charitable motivations, and how to ask them in a variety of different ways. Master this questioning approach and you will create a trusting relationship with your prospect.

WHY THESE QUESTIONS WORK

They elevate the fundraiser to the level of peer with the prospective funder. They make it easy, even for people who don't raise money professionally, to open the conversation and begin relationships. And they tell you what your donors think and feel – in your donors' language.

These Three Simple Questions change the conversation to one of respectful interest centered on the donor and his or her reasons for giving, personal advancement, reputation-building, desire to redress wrongs, or any other sentiment that provokes charitable giving. Questions like these create an atmosphere that gives both parties permission to say "we are not really right for one another," and still part on good terms. And considering the cost of your scarce and precious time, that answer is a desirable one if you want to invest in prospects with potential for high lifetime value.

PREPARATION: WHAT YOU REALLY OFFER

Your organization is justifiably proud of its mission, programs and outcomes. That's fine, but before you start bragging about your wonderfulness, find out what your funders want to support and why. Corporate partners may want to get points for being good corporate citizens, and to market their goods and services. Grant-making foundations want to invest in organizations that can prosper. Donors may be motivated by complex issues, ranging from a passionate commitment to your agency's cause, to their desire to hobnob with the rich and famous.

It's important to understand how your agency and its program impact your funders' charitable philosophy, motivations for giving, and expectations. While you need to raise money to run the organization, donors give for a variety of reasons. They believe in you. Maybe your agency served them or a relative. They feel an obligation to give back. Maybe they seek the social prestige they might obtain by donating to your agency. The way to find out? *Ask them.*

WHO DID YOU SAY YOU WERE TALKING TO?

Make sure you're talking to the right person – the decision maker. You might not know that at first, so use similar questioning techniques to find out. If you're talking to a foundation's junior member of support staff, a sales person at the prospective corporate sponsor, or the donor prospect's brother-in-law's dog groomer, those people can't make the decision. Go ahead and find out their role. They're certainly worth cultivating if they can introduce or sponsor you to the right person.

To put this all more succinctly – stop chasing the money! If you're not talking to the right person, or the person can't get you to the right person, rethink it. If you're trying to cultivate a "donor" who really doesn't want what you offer, or you have to redesign your whole program just to win a grant, cut it out. Or I'll yell at you.

THE FOUR-STEP QUESTIONING SYSTEM

Good questioning skills may come naturally to some people; the rest of us need to be taught. In this SMART Practices Report, we discuss ways to ask *persuasive* questions, questions that persuade others to do whatever it is that YOU are trying to get THEM to achieve. These skills are valuable if you are fundraising, managing others, or dealing with unruly children.

As you read through the Four Steps, please think of a specific prospective funder, and use that prospect as your 'case study.' Write down how you would execute each Step, with that funder in mind.

- *Step 1: Plan for Questioning.* Before you ask any questions, figure out what it is you are trying to accomplish. In the context of this report, you are trying to establish trust and learn if the prospect represents a good, bad or indifferent investment for your agency. So you need to know whom you are questioning, what their role is (i.e. major donor, corporate executive, grant-maker staff), what their charitable goals may be, and most important, what answers you want to

hear. Knowing the answers you want to hear, before you hear them, will improve your fundraising confidence and shorten your cycle times.

Who am I questioning, by name and type of prospective funder? _____

What am I trying to accomplish with this/these questions? _____

What answers am I looking for? _____

- *Step 2: Ask.* Go ahead and ask your question. Be direct without being confrontational. For one thing, the prospect already knows you are seeking a charitable gift. There is no need to pussy-foot around.

Your question: _____

- *Step 3: Listen and Evaluate.* Pay attention and listen actively. As you listen, ask yourself a few questions, such as the following. Write down your own examples where shown.

What did I hear (the facts, the things the prospect actually said)? _____

What does that tell me (the meaning behind the facts)? _____

Can we (our agency) fulfill their expectations? _____

Are their expectations and yours in alignment? In other words, can you provide the service, support, recognition, visibility etc. that seems to be important to this prospect?

What actions or responses would be appropriate at this time? _____

- *Step Four: Respond or Take Action.* This is where you really begin to gain trust. As you take the fourth step, keep your focus on the donor and not on your own needs.

Summarize what you heard. “If I understand you correctly, you said this and that, and so on. Did I get that right?” Your example: _____

Ask for clarification if necessary. “In other words, Am I correct? Oh, I misunderstood, could you clarify for me.” Your example: _____

Commit to a response. “OK, I think I’ve got it. You would like to know something about such and such, how we produce these outcomes/those statistics, what other major funders support us, etc. etc.... Let me tell you... / I’ll get back to you... / I’ll provide you with that” Your example:

Then, keep your promises!

Exercise #1: Needs vs. Motivations

We have listed some typical charitable motivations in the right-hand column. If you read the SMART Practices Report *Why Your Best Funders Support You*, you conducted an exercise called the Exchange of Value that showed how your Value-Added Strengths have an impact on your best funders’ charitable philosophy and expectations. Review that exercise as you complete this version of it.

Our Strengths, Value-Added	Donor’s Charitable Philosophy
	<input type="checkbox"/> Passion for the mission; love the institution (arts, zoos, etc.) <input type="checkbox"/> I or a close friend or relative was affected by (your cause) <input type="checkbox"/> Believe that philanthropy is a moral obligation; want to give back <input type="checkbox"/> Enjoy socializing among other like-minded people <input type="checkbox"/> Seek social prestige <input type="checkbox"/> Looking for leadership opportunities; want to volunteer or serve on board <input type="checkbox"/> I give because of your (founder, executive director, etc.) <input type="checkbox"/> Other

NOTE: Many nonprofits rely on the ‘accidental talents’ of their founder, executive director, or some other personality associated with the organization. This is a dangerous strategy; after all, what ties the donor to the agency, once that individual is no longer around to exert influence? Learn if the ‘cult of personality’ is at work in your fundraising efforts. Complement or replace it with messages reflecting your best donors’ deeper personal motivations and philosophies.

YOUR UNIQUE VALUE PROPOSITION

Establish yourself with a brief statement of your Unique Value Proposition or UVP, the succinct statement that positions your agency as a good charitable investment.¹ When you are meeting with and qualifying the potential of a prospect, don’t take it as an opportunity to “show up and throw up.” In other words, don’t go on and on about how broke your agency is and how much you need the money. And for heaven’s sake, don’t back the donor into a corner and demand a gift. Instead, use the conversation to establish rapport and gain trust.

Exercise #2: Build Your Unique Value Proposition

Analyze your UVP so that you can engage the prospect with a short statement that rolls right off your tongue. If you completed this exercise in Session 1, refer to it here.

Ask Yourself Questions Like These	Develop Answers Based on These Ideas
What Do We Do?	Describe your agency and its mission and programs BRIEFLY.
Who Are Our Recipients?	Describe the individuals or groups that benefit from your agency’s work.
Why Are We Worthy of Charitable Giving?	Describe why your agency justifies the support of a typical funder. Concentrate on your organization’s strengths (not its weaknesses), the value and importance of your mission, and your ability to make good use of the money you get.
Why Do You Need Their Help?	Show how your organization makes a difference in the world. Explain how you could expand your impact with their support.
What Happens When You Achieve Your Financial Goals?	Describe how your programs and services could expand, how more people could be helped, how you could improve on your strengths, expand your service portfolio, etc.

¹ This would be a good time to read or re-read [“Fundraising Strengths Your Competition Can’t Touch,”](#) another SMART Practices Report.

THE THREE SIMPLE QUESTIONS

Question #1: The Success Question, to elicit the donor's positive motivators.

This question is very simple: "What do you want to achieve?" Like all three Questions, these six short words offer enough variations and options to keep your prospect talking for hours. Here are some variations and elaborations on the Success theme:

- What inspires you to give to charity? What causes or missions are most likely to draw your attention? Why?
- What do you want your gifts to accomplish?
- Why is that important to you?
- If the nonprofit that you support were to be completely successful, what would that do for you? Why would that be important to you?

As you can see, the Success Question alone will open up enormous amounts of back-and-forth discussions with your prospect, and just as well with a current funder. In fact, there is no limit to the number of times you can find a use for some variation of the Success Question.

IF AND ONLY IF: If you are interviewing a current donor, it is legitimate for you to ask specific questions about your agency, such as "what inspires you to give to our agency year after year?" "Why is our agency so important to you?" and the like. Current donors are the best source for learning what motivates future donors.

Exercise #3: What the Success Question Will Do for You

List answers you think your funders (donors, grantors, corporate partners) would give you, if you asked this question. What would they actually say? How could you use what has been said, to qualify the donor? PS: If you don't know, first guess; then go find out.

QUESTION #2: THE 'AVOID' QUESTION, to elicit the donor's negative motivators

The second question is the 'Avoid' question: "What do you want to avoid?" This question elicits the flip-side of the 'Success' questions, giving more perspective into motivation. It offers many variations.

- When you think of charities you have supported (or currently support), what do you want those charities to fix, wipe out or resolve?
- What is it about the [issue, problem, disease, social condition] that bothers or concerns you so much; how does that affect your charitable decisions?
- What's at stake if your preferred charities are not able to achieve their mission?

- What do you think/fear might happen, if [this social or medical, etc., issue] is not resolved?
- Why is that important to you?

NOTE: Some people respond better to Success Questions, while some open up and exhibit more trust with Avoid Questions. Using both techniques produces more complete insights and engages trust more deeply and quickly. The Avoid Question is highly unexpected, demonstrating your meaningful grasp of and respect for the prospect’s reasons for charitable giving. Use both approaches.

Exercise #4: What the ‘Avoid’ Question Will Do for You

List answers you think your funders (donors, grantors, corporate partners) would give you, if you asked this question. What would they actually say? How could you use what has been said, to qualify the donor? PS: If you don’t know, first guess; then go find out.

QUESTION #3: THE ‘RIGHT CHARITY’ QUESTION, to elicit donor expectations about service and recognition.

The ‘Right Charity’ question asks: “How do you decide which charities to support?” Like the first two Questions, it can be presented many ways, but its real purpose is to find out how the prospect makes the decision to give. Some variations:

- How do you choose the charities you want to support? What would you need to see or hear from a nonprofit in order for you to make a significant commitment?
- What would a charity need to show you, after you’ve made your gift, to convince you that you had made a wise investment?
- When selecting a charity, what is uppermost in your mind?
- Have you ever decided not to invest in a charity, or even withdrawn your support from one? Why did that happen?
- When you think about other charities that you have supported or currently support, what did you like best about them? Why was that important to you?
- What about charities that disappointed you, or that you would be reluctant to invest in, other than their mission or cause? Why did they disappoint you, what were you trying to avoid?

Remember, most larger funders support other charities. Be extremely diplomatic when asking the Right-Charity question. Don’t trash the competition. These funders will have to decide if it’s worth their while

to add your organization to their portfolio, or even dump one of their charities and replace it with yours; you don't want to call their earlier decisions into question.

Exercise #5: What the 'Right Charity' Question Will Do for You

List answers you think your funders (donors, grantors, corporate partners) would give you, if you asked this question. What would they actually say? How could you use what has been said, to qualify the donor? PS: If you don't know, first guess; then go find out.

OMG – THEY SAID YES! NOW WHAT?

Sometimes these simple questions succeed beyond expectations and the prospect leaps ahead to offer financial support. First, take a deep breath. Bursting into tears, falling down and kissing the prospect's loafers is probably not a good reaction. Now, *test for clarification*. It is all right to say something like, "Are you saying you'd like to support us?" If the answer is yes, first say thanks and then start working on the details – how much, when, for what. Make sure you understand their expectations, and they understand your gift acceptance policies, payment methods, stewardship and recognition practices. Download another SMART Practices Report, ["The Donor Said Yes, Now What?"](#) for more ideas.

SUMMARY

The Three Simple Questions provide you with dozens of conversation starters and deliver probing insights. They are easy to ask, and prospects like to answer them – the focus is on them and not on you. Get everybody into the act – board, staff, even volunteers. The benefits are worth it.

- You'll foster a more intimate relationship with current donors;
- Board members, volunteers, and even non-fundraising staff find these questions easier to use than the traditional "ask";
- You'll obtain flawless insights into donor motivation;
- You'll find out fast if this prospect justifies more of your time – or none at all.

WHAT YOU CAN DO NEXT:

- **DIY Projects (Do It Yourself):** Fill out the templates in this form. Consider asking other staff members, development officers or campaign consultants for their input; many minds make better results. Download other [SMART Practice Reports](#) to complement what you've learned!
- **Bring Fundraising the SMART Way™ to Your Nonprofit:** Call BSG to learn more about our flagship methodology Fundraising the SMART Way™, and how implementing it will revolutionize

your fund development strategy and results. You can reach us at 305-935-6676 or visit our website at www.bristolstrategygroup.com.

- **Participate in a Shared Program:** Thanks to our relationship with several capacity-building organizations, we offer Fundraising the SMART Way Shared Programs, where four to six agencies collaborate on the entire SMART Way program at affordable fees per agency. The program lasts for four to six months.

ADDITIONAL RESOURCES FROM BRISTOL STRATEGY GROUP:

- [*The Leaky Bucket Assessment for Effective Fundraising.*](#) Evaluate nine basic business practices that either contribute to or detract from the effectiveness of your fundraising efforts. This 5-minute assessment is free and you'll get your results immediately.
- [*BSG Opportunity Risk Calculator.*](#) Find out what one hour of your development time is really worth. The answer may surprise you.
- [*De-Mystifying Fundraising: Seven Steps to Fundraising Success.*](#) e-book. Download and read it today.
- [*The SMART Fundraising Game.*](#) show board and staff what fundraising is really all about! This little game is a great opener for a board or staff retreat.
- [*The Leaky Bucket: What's Wrong with Your Fundraising and How You Can Fix It!*](#), by Ellen Bristol and Linda Lysakowski, ACFRE, published by CharityChannel Press August 2013.
- [*Fundraising the SMART Way™: Predictable, Consistent Income Growth for Your Charity.*](#) by Ellen Bristol, published by John Wiley & Sons, March 2014
- [*The SMART Practices Resource Library*](#), our online catalog of white papers

Fundraising the SMART Way™: BSG's innovative methodology for sustainable fund development. The SMART Way process allows you to create the benchmarks, performance measurements, rules, guidelines and reporting methods that drive high levels of efficiency and productivity in the fundraising organization. The SMART Way™ Scorecard 2.0 adds an intelligent, software-based toolkit unique to your organization that ranks your donor prospects based on their potential for a Return on Your Effort, and also provides efficient Opportunity Management methods. Fundraising the SMART Way™ helps you **raise more** money while you **work less**.

ELLEN BRISTOL



Ellen Bristol, president of Bristol Strategy Group, works with nonprofit organizations to improve the effectiveness of their fundraising efforts, increase total income and fund diversification, involve board and staff members more effectively, reduce turnover in the development office and maintain desired levels of quality and services.

A classic late-bloomer, Ellen spent the first twenty years of her business career selling mainframe computer systems. Only after she launched Bristol Strategy Group did she discover her true calling: adapting the principles of business-process management to nonprofit fundraising. Since that big “a-ha” moment, she has become a true performance-management geek and a nut for metrics. Along the way, she has:

- Developed the SMART Way™ methodologies, an innovative, strategic approach to managing revenue generation based on classic business-process disciplines, with variations for nonprofit fundraising, social enterprise and for-profit businesses;
- Designed and launched the Leaky Bucket Assessment for Effective Fundraising, the single largest study of fundraising staff performance, with responses from more than 800 nonprofit professionals around the world;
- Implemented Fundraising the SMART Way™ for dozens of nonprofit organizations;
- Author, ***Fundraising the SMART Way: Predictable, Consistent Income Growth for Your Charity*** and co-author ***The Leaky Bucket: What’s Wrong with Your Fundraising and How You Can Fix It***, with Linda Lysakowski, ACFRE, both available at Amazon and the AFP Bookstore;
- And created the SMART Fundraising Game, a light-hearted way to show staff and board what fundraising is really all about.

Recently, Ellen collaborated with her grandchildren to write a children’s book called *Morton the Marvelous Monster*. Her eight-year-old grandson only agreed to participate if she promised to split the proceeds with him. He is still waiting for his first royalty check.

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