

the Artful
asker
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The Mindset and Methods for
YOUR Major Gift Success!



The Mindset and Methods of Giving Success

*With Marcy Heim
Founder, The Artful Asker
Madison, Wisconsin, USA*

Presentation by Marcy Heim, The Artful Asker, www.marcyheim.com, 888-324-0442



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Marcy Heim, CFRE
Founder & Principal

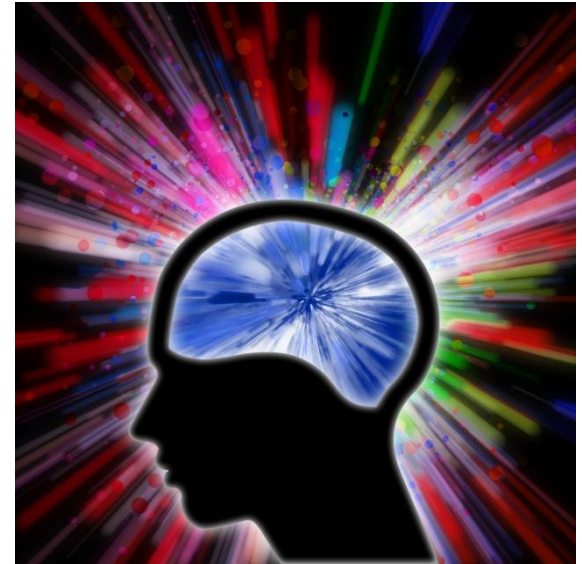
THE ARTFUL ASKER

Marcy Heim, CFRE, is an author, international speaker and fundraising and life coach for those transforming the world through philanthropy. Her direct and entertaining style reflects over twenty years of in-the-trenches, major gift fundraising and management success. She and her team raised millions by creating the very relationships Marcy teaches in her popular sessions.

She's an AFP Master Teacher and received both the CASE Crystal Apple and AFP's Outstanding Fundraiser awards. "Empowering Development Ambassadors" is Marcy's book on major gift relationship-building and the role both methods *and* mindset play in giving success.

Session Goals

- The Power & Joy of Philanthropy
- Why people give/The Words we use
- The Cycle of Successful Relationships
 - Action Steps Around the Cycle
 - Role of Board and Staff



Limiting Beliefs

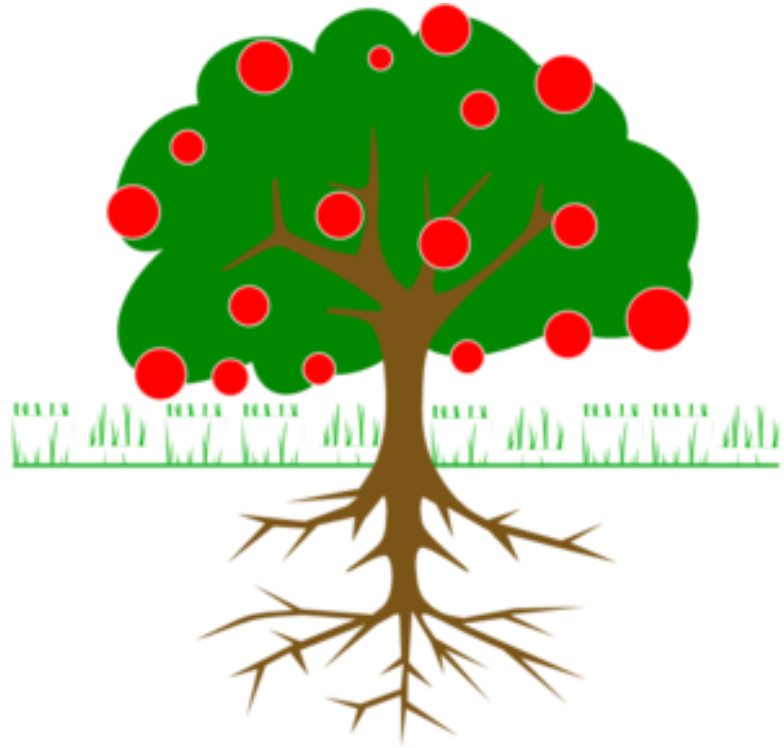
- Life happens to us.
- Doing something the same way will generate a different result.
- Money is a necessary evil.
- There's not enough. We're not enough.
- We just need to sell it - use the right words.
- There's a lot to be afraid of.

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The fruits and the roots Inner and Outer World





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We are the sum total of our thoughts

The thoughts we have lead us to the decisions we make and create the actions we take that generate the results we get in our lives.

Marcy Heim

Questions to ask

- Why does money come to me so easily?
- Why does accountability make me so strong?
- Why is it so easy for me to talk about money with my prospective givers?
- Why is abundance attracted to me and our mission?
- Why do I take just the right steps to match prospective givers with my mission?

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**“What’s
the cause?
Can’t you
just give?
Must there
always be
a cause?”**

Philanthropy: Write this down

- From the Greek word, philanthrapia, meaning love of humankind. The effort or inclination to increase the WELL-BEING of all through the giving of one's time, talent or money for the GREATER GOOD.

INVEST IN JOY!



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WRITE THIS DOWN!

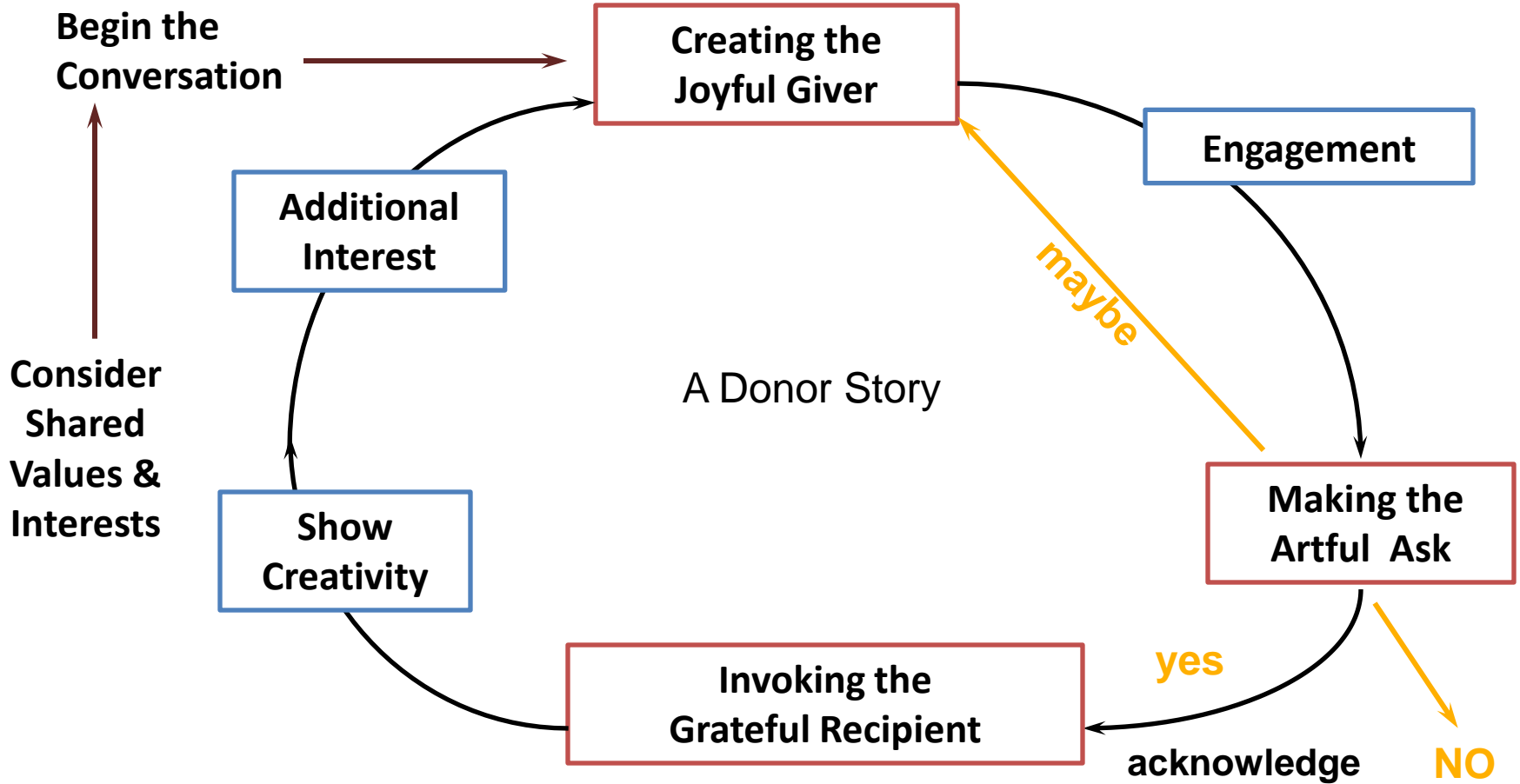
Philanthropy is the Mystical
Mingling of a joyous giver,
an artful asker, and a
grateful recipient.

Douglas M. Lawson (1936)

The Artful Asker Cycle of Successful Relationships©



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Why Do People Give?



- Mission
- **They are asked**
- Stable & ethical
- In honor someone/thing
- Extend their values
- Regard-staff/volunteer leadership
- Belong -Community



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"We become what we
think about!"

Earl Nightingale
The Strangest Secret

Declarations about Raising Major Gifts

- My cause is worthy of people's investment
- We are a sound and accountable organization
- We make a difference and I am proud of what we do
- By giving to my organization, my donors experience the joy of philanthropy! It feels GREAT!
- I delight in hearing about gifts to other organizations
- I love to give to my organization myself
- People love to give me money!



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Let's sing!

**People love to Give me Money
To Make a Difference
People love to Give me Money
I'm the link to their investment**

Let's Get The Money!

- hit up
- put the arm on ...
- The bottom line
- loaded
- milk
- ... should give
- ... ought to give
- ... owes us
- Contacts per month
- get into his/her pockets
- Loosen the purse strings
- pick the low hanging fruit

What about?

- Prospect
- Suspect
- Follow up
- Strategy
- Move you
- Pitch
- Close
- Qualify

Dream

Make a difference

Gift

Consider

Impact/Hope

Meaningful

Exciting/Passion

Sustaining/Enduring

Possibilities/Imagine

What to you think?

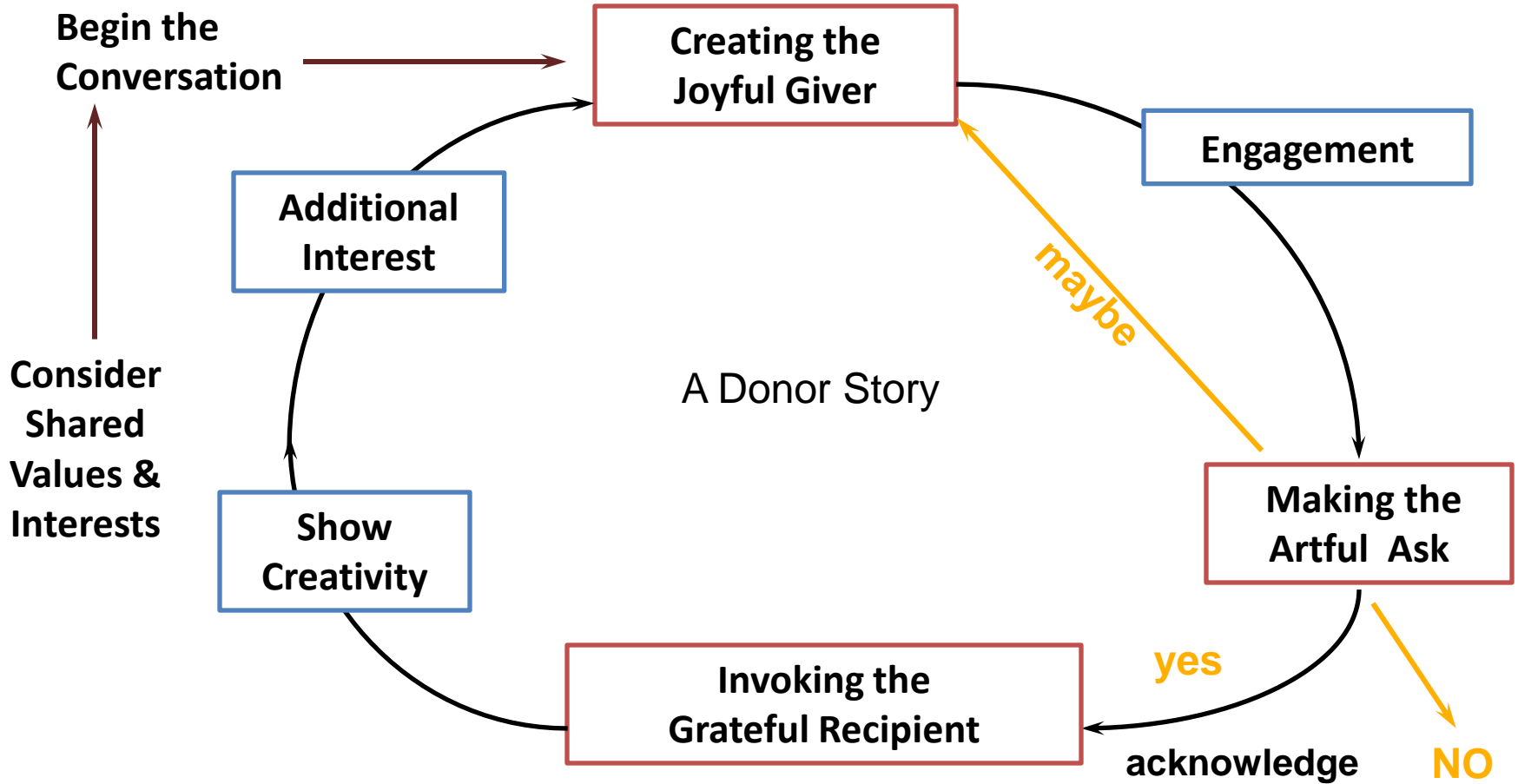
Opportunity to invest

Thank you/Gratitude

The Artful Asker Cycle of Successful Relationships©



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Beginning the Conversation

- Think about people like you---who share your values and interests
- “Have you EVER heard of us?”
- “Do I agree with what you do? Do I want to know more?”
- Be VERY clear on why you champion, invite and invest – money likes clarity
- Start listening for connections between options for giving and givers’ interests
- Share your story– anywhere and anytime!

Creating Joyful Givers

- Make communicating with others a priority – newsletters, website, etc. Telling the story!
- Board/volunteers play a key role here for their own 1:1 connections & to connect staff – Money comes through people. Consistency.
- Let the relationship evolve – Grandchildren syndrome
- Create EXPERIENCES – big and small to be involved and see first-hand the impact (Invite)
- Talk/listen about what you need – get to dollars/impact Money loves certainty.



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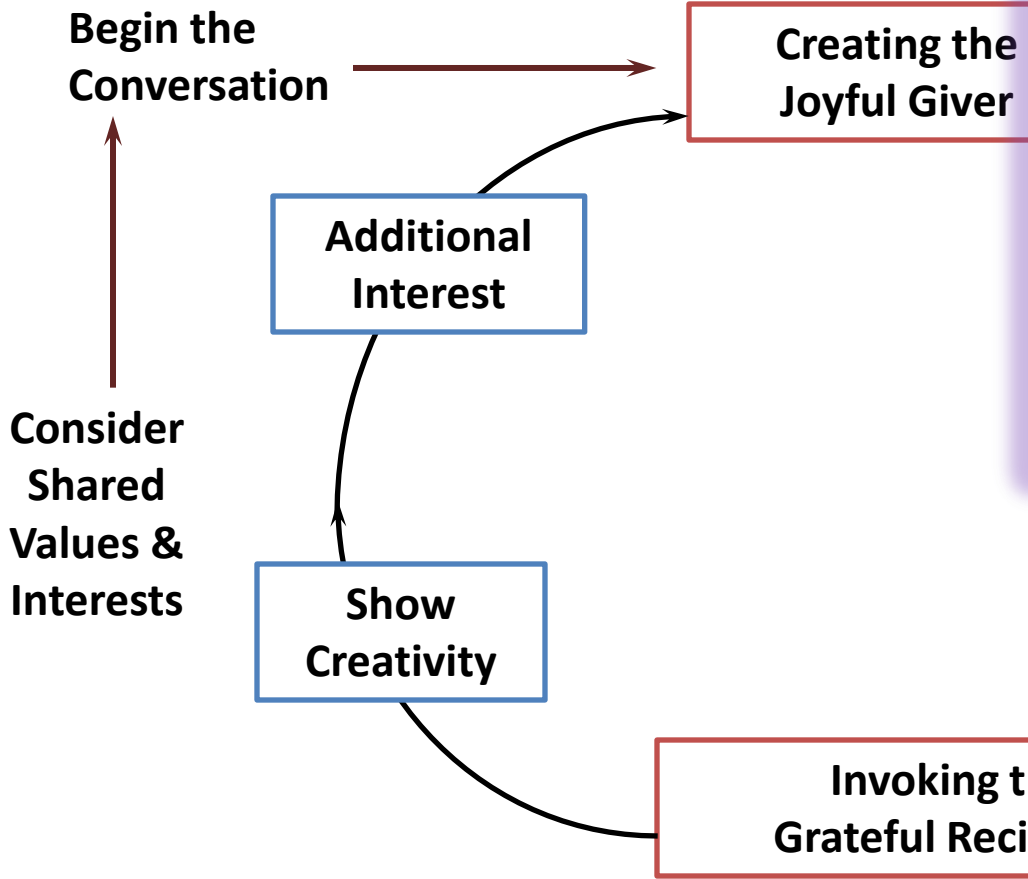
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Ignorance - Interest – Experience – Participation - Ownership

- (always ask) Am I getting an adequate return on my investment?
- Is their cause important to me?
- Do I trust the them?
- Are they doing a good Job?
- Do I want to consider giving more?
- Do I know the leadership?
- Are WE doing a good job?
- Do I feel valued?
- Am I having fun?
- Do I believe in the leadership?
- Am I proud of the work WE are doing?
- Can I afford to give more?
- Can I ensure their work continues after I'm gone?
- Do I want to leave a legacy behind?

The Artful Asker Cycle of Successful Relationships[©]

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They agree on the value of our organization/mission.

They agree with the vision of our leadership.

They see that private support is needed for this project to happen.

We have a relationship built on trust and have talked through all the concerns they have about giving methods and the project.

We have talked about different specific components and giving levels and found a project that accomplishes their dream.

WOULD YOU CONSIDER...

Making the Artful Ask

yes
acknowledge

NO

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Major Issues in Asking – Please see book!!

- What are the important linkages?
- How much do you ask for?
- Who makes the ask?
- Where is the best location to make an ask?
- What do you send out ahead of the call?
- When is the timing right?
- How do you make an artful ask?
- Common pitfalls in making an ask?
- What do you **say** when....responding to objections.
- How do you follow up?
- What do you do if the answer is “no”? Or YES!

Rehearse/Role-play

- WRITE OUT the ask
 - Practice the ask
 - Define roles of team members and role-play the call
- bestow sincere honor/praise
 - make a connection to this request
 - be *considerate*; ask for consideration
 - state specific amount
 - state specific purpose
 - Be quiet

Is this an Artful Ask?

- bestow sincere honor/praise
- make a connection to this request
- be *considerate*; ask for consideration
- state specific amount
- state specific purpose
- Be quiet
- **Joe, your service on our Board has been instrumental to our success in creating and expanding our Garden project. We know you understand, in addition to the beauty, what an important teaching tool this is for us. Would you consider a gift of \$50,000 to establish the Joe Smith Garden Outreach Program endowment?**

An Artful Ask

Name _____

You have (compliment, service, giving)

You understand (special connection to this request)

Would you consider a gift of \$_____ for/to
_____. THEN QUIET

What are the Common Pitfalls in Making the Ask?

- We talk too much
- Ask sounds cold or inconsiderate
- We use words like “should” and “ought”
- We ask apologetically and are embarrassed
- Eye contact breaks down
- The ask is rushed
- We break the silence too soon after ask is made

Making an Artful Ask

- ❖ Make an ask only if you are comfortable in doing so
- ❖ Arrange the ask call for staff
- ❖ Agree to be a “member” of the asking team
- ❖ Serve as the testimonial regarding the organization
- ❖ Discuss the impact a gift will have on your organization
- ❖ Be a role model for a similar level of giving
- ❖ Show strong support for organization’s mission/priorities
- ❖ Support a potential giver’s inclination to support another project

Adages about Asking (all true)

- You almost never get the gift you do not ask for
- You must earn the right to ask – 90% of the work takes place before the ask
- You must balance the art and the science
- You must focus on serving your donor
- Nothing is more rewarding than the results and impact of an “artful ask”

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*A
wedding
cake in
the
Garden*

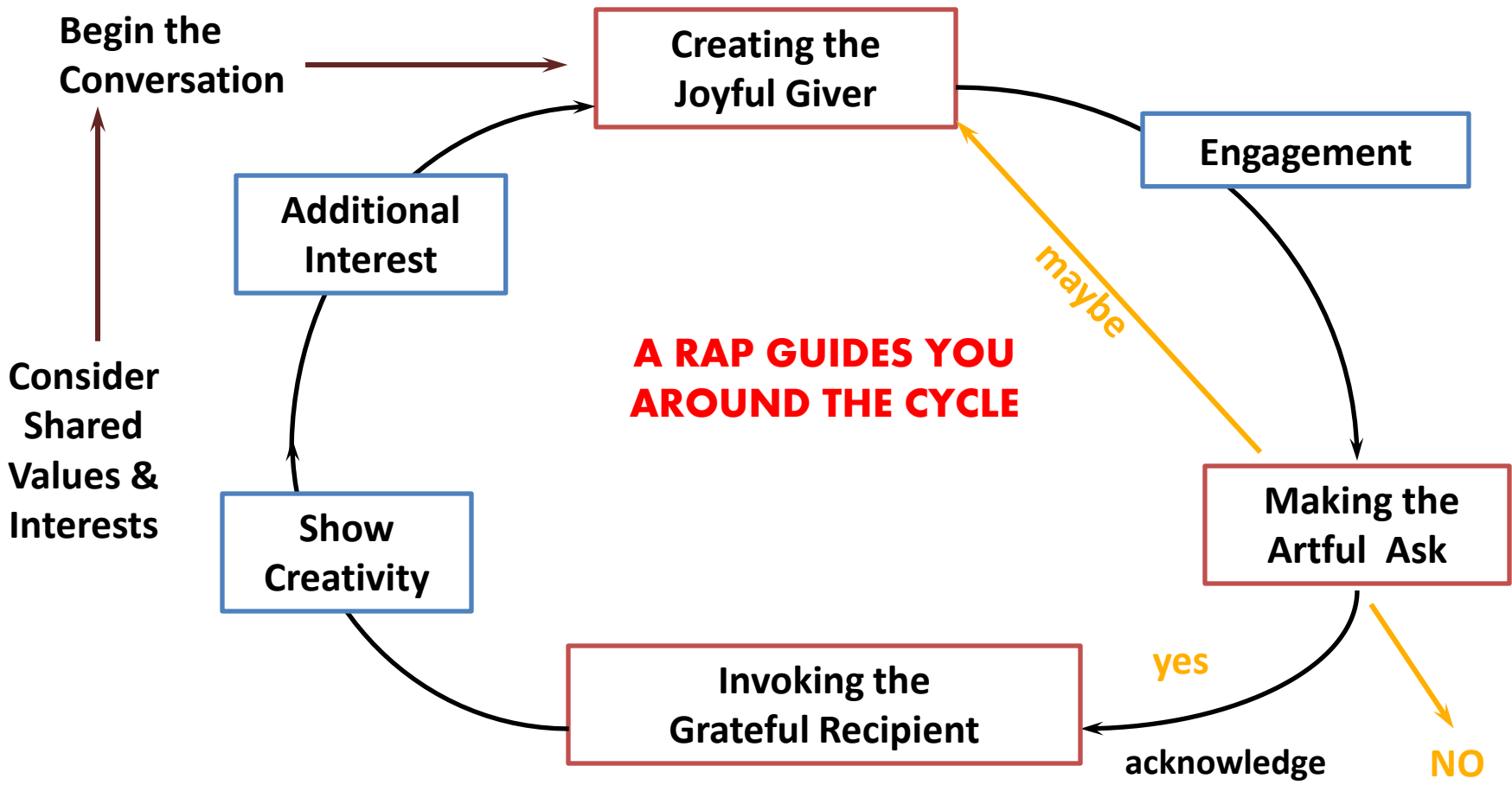


Being a Grateful Recipient

- Steward the gift, donor and a culture of stewardship – Money loves systems.
- It's all about demonstrating IMPACT
- Be genuinely grateful, Listen for any concerns or questions
- Deepen and continue the personal relationship. Money love consistency.
- Thank people with NO SOFT ASK!
- Be creative and watch for the sparkle. Listen for new interests in your organization

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Write and Execute RAPS

A written plan of the specific, artful actions you, and/or your partners, will take, at least once a month, with your top 25-50 donors over a year or more to facilitate their maximum investments.





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When you believe,
you'll BE believed



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Take back the power
and knowledge that
you create
everything in your
life...and everything
that is NOT in it.



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INVEST IN JOY!

Invest in Joy, We know the way

To compose a good world, Day by Day

Invest in Joy,  It's a privilege

To Live, to Give!

Remember WHY we do what we do

and HONOR THE DONOR



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Questions? Just get in touch!

Thank You!



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