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POWERFUL THINKING | CREATIVE CONSULTING

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## The Big Gift

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Getting a campaign  
underway is like  
mating elephants ...

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1. It's done at a high level

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2. It's accomplished with a great deal of roaring and screaming

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Getting a campaign  
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1. It's done at a high level
2. It's accomplished with a great deal of roaring and screaming
3. It take two years to produce results

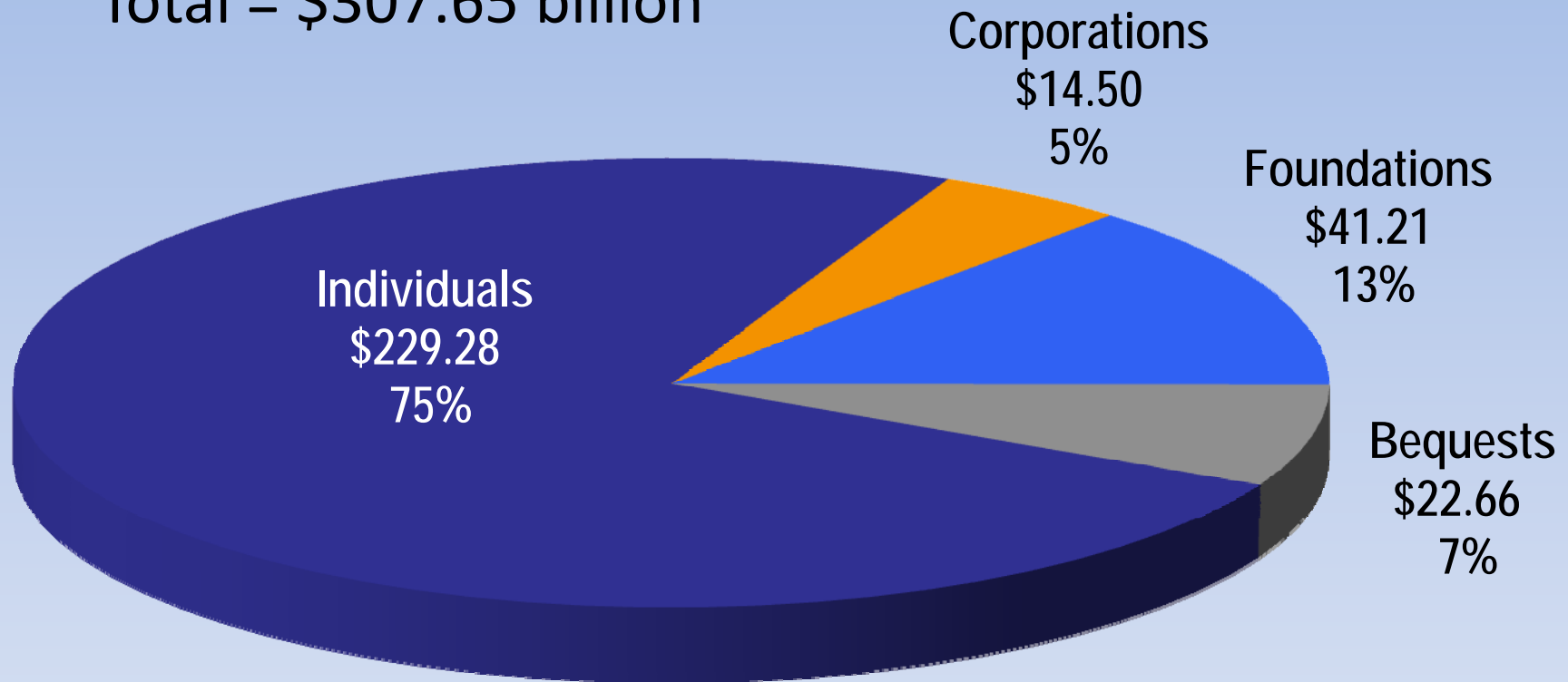
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# The Fine Art of Asking

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# 2008 Charitable Giving

Total = \$307.65 billion



Source: Giving USA Foundation™ / Giving USA 2008

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# The Five Steps

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1. Identify (or Investigate)
2. Inform (or Introduce)
3. Interest
4. Involve
5. Invest



# How in the world do you get the appointment?

- The casual encounter
- The telephone call
- The email or letter

The trick is, DO IT! (Duh.)



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So now you're there.  
What now?

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# The Nine Key Points

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# Quoting Si Seymour:

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For clinking money, you shake the can.

For folding money, you go ask.

For big money, you take pains.

# Point #1: Planning is Everything

- A strategy for each prospect
- Asking for help and guidance
- Rehearsing

# Point #2: Know Your Story

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- The mission
- The aspirations
- The rationale
- The needs
- The elevator speech



# Point #3: Solicit Face-to-Face

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(ideally with a teammate)



Letters do not  
get big gifts.

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## Point #4: Cite Your Personal Commitment

- Up front
- In response to a question
- Specificity vs. “Significant”
- Need not be at the level being asked for.



# Point #5: Attitude is Everything

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- Be unfailingly positive
- Be contagiously enthusiastic
- Body language really counts
- You are empowered
- Level of expectation is high



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# The Reverse Attitude is Deadly

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- Do not be apologetic or defensive.
- Things not to say:
  - “I don’t suppose you could possibly...”
  - “I know you have a lot of demands on your philanthropy...”
- And the worst:
  - “We have you down for...”

# The Really Bad Stuff

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- “Twisting arms...”
- “Leaning on...”
- “Coughing up”
- “Putting the squeeze on...”

So how do you get it out?

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A useful phrase:  
“thoughtful consideration”

# Point #6: Listening Carefully: A Fine Art

Be prepared to adjust your strategy.



“Fancy footwork is at least 50% of good solicitation.”

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## Point #7: Have a Target in Mind – and Aim HIGH

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- Be ambitious but not audacious
- Specific number vs. use of gift table
- Remember the multi-year pledge
- Remember your priorities (cash vs. deferred)

# Point #8: For Heaven's Sake, ASK!!!

- Ask and then shut up
- Amazing what happens when you ask
- Playing for the flinch

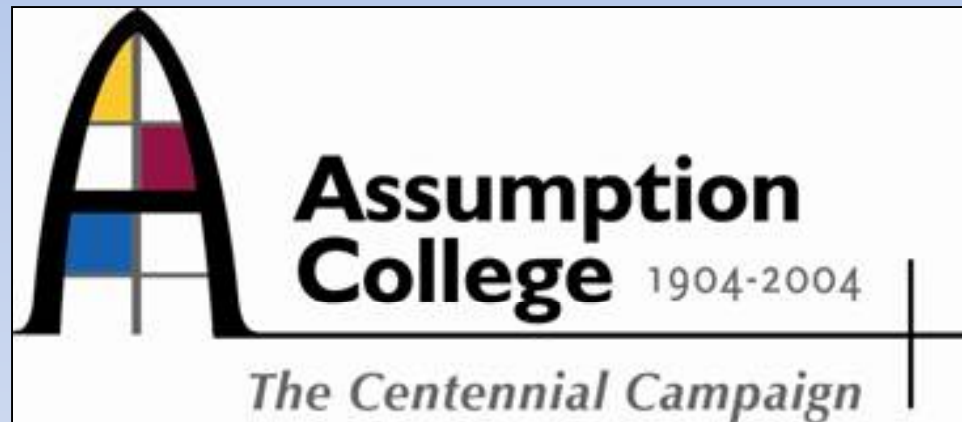


# Point #9: Follow Up Appropriately

- Guideline: this is cultivation for the next gift
- Receipt and thank-you letter(s)
- Stewardship : short and long-term
- Trip report to the home office



# A True War Story:



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# Comments, Questions, and Answers?

# Thank You!

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