



# Texas Association of Community College Foundations

## 2017 Annual Conference



Rachel Muir, CFRE

Nonprofit Consultant, Speaker and Trainer

When she was just 26 years old, Rachel Muir launched [Girlstart](#), a non-profit organization to empower girls in math, science, engineering and technology in the living room of her apartment with \$500 and a credit card. Several years later she had raised over 10 million dollars and was featured on Oprah, CNN, and the Today show.

A winner of Oprah Winfrey's Use Your Life award, Rachel is a three time finalist for Ernst & Young's Entrepreneur of the Year Award, was named "Outstanding Fundraising Executive of the Year" by the Association of Fundraising Professionals, and one of Fast Company Magazine's "Fast 50" Champions of Innovation.

Rachel has been featured in CosmoGIRL!, Texas Monthly, Glamour, and The Dallas Morning News, and most recently Fundraising Success Magazine. Her career spans includes leading an online fundraising consulting practice at Convio/Blackbaud and managing major gift portfolios for some of the country's largest and most successful nonprofit brands. Rachel serves as Vice President of Training at Pursuant, where she leads online, classroom and custom trainings to transform people into confident, successful fundraisers.



## **NAIL THE ASK**

February 15, 2017 | TACCF



# Discovery guide

[www.rachelmuir.com/guides](http://www.rachelmuir.com/guides)



## *Discovery Guide*

If we want donors to understand us we have to start by understanding them. Donors give for their reasons, not ours. We don't convince them. We help them realize they already care. Great discovery is the key to retain and upgrade our donors. To help you

Free  
discovery  
tools

How to get  
the visit

Framing  
fundraising &  
how much to  
ask for

The best  
discovery  
questions you  
could ever ask

Overcoming  
objections

# How to Nail the Ask

# What will I learn today?



The right approach to making an ask  
How to overcome objections  
How much to ask for  
The anatomy of an ask & soft skills  
How to handle the difficult donor

@rachelmuir

# Top fears...

A woman with brown hair pulled back is covering her face with both hands. She is looking through her fingers with a wide-eyed, fearful expression. The background is a plain, light color.

Public  
Speaking

Death

Spiders

# How fundraising is like proposing



The world is full of generous people who want to give

95% of the ask is what leads up to it

You are JUST trying to help and make the world a better place

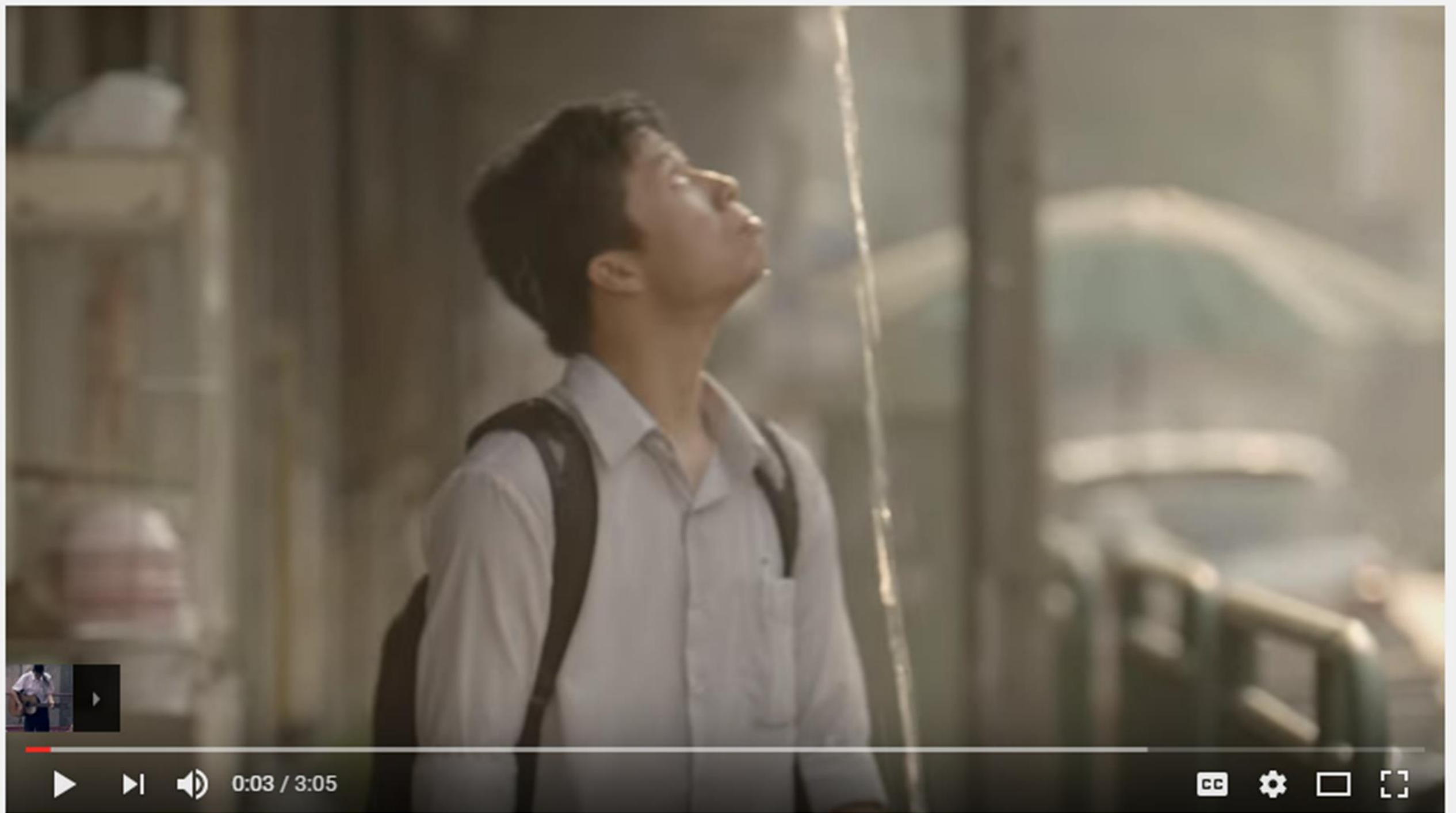
# 5 Fundraising Truths

Giving is a joyous experience that feels good to the donor

Being asked makes donors feel important



Giving is  
neurological  
equivalent of  
winning lottery ticket



"Unsung Hero" (Official HD) : TVC Thai Life Insurance 2014 : โฆษณา  
ไทยประกันชีวิต 2557

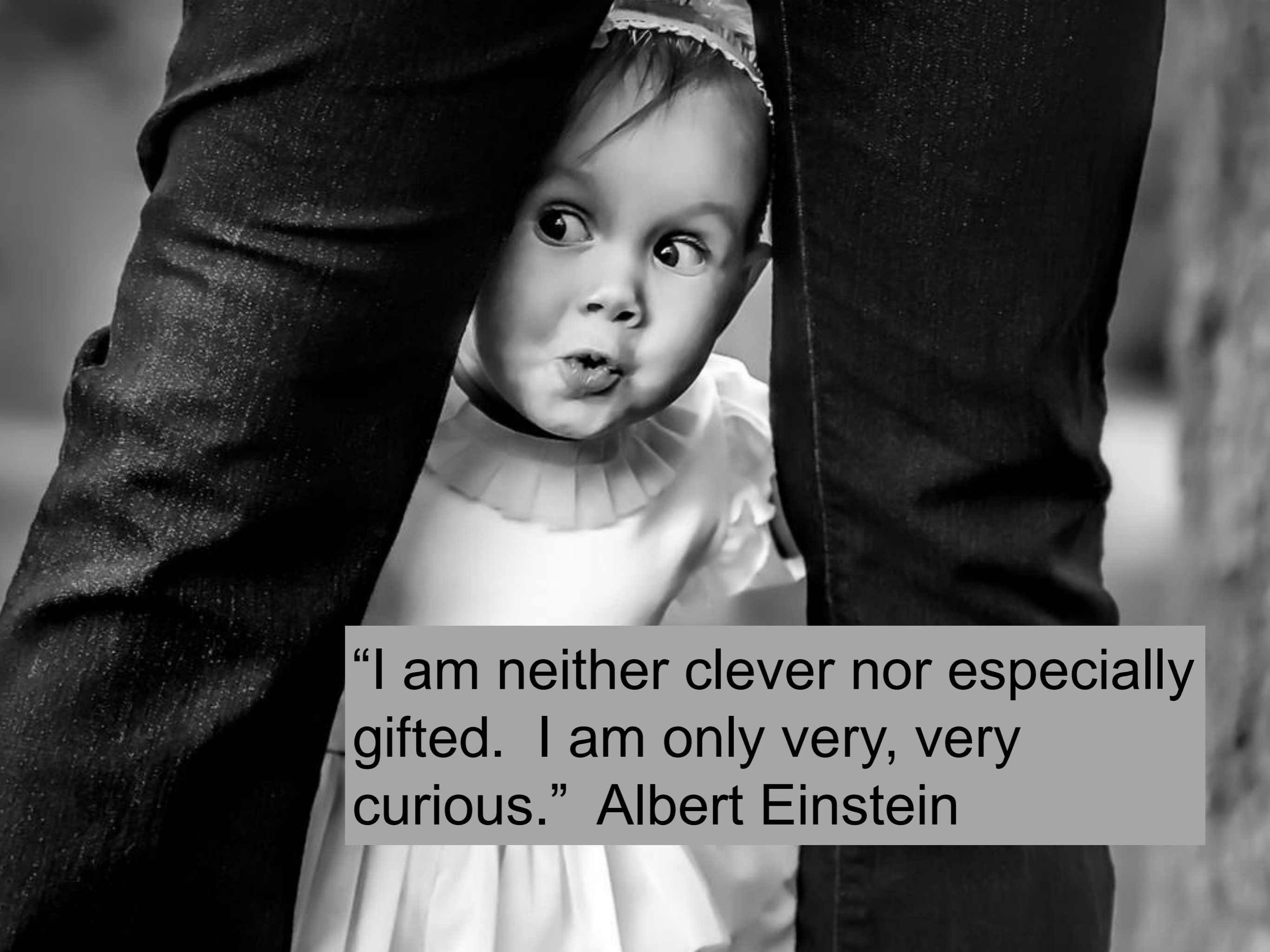
Myth: It's about the organization.

It's about the  
**DONOR.**

@rachelmuir



The best way to have a meaningful relationship with a donor is to be meaningful to them.



“I am neither clever nor especially gifted. I am only very, very curious.” Albert Einstein

Prepare for the visit

“Legal stalking” with  
donors/prospects

LinkedIn

Google+

Twitter

Pinterest

Charlie

Bananatag

BombBomb

Want to chat with Rachel? [Calendly.com/rachel-muir](https://calendly.com/rachel-muir)

It's about them. NOT you.

“What is your relationship to our work?”

“Tell me more.”



A photograph of a woman with dark hair pulled back, wearing a light blue button-down shirt, smiling warmly at a man whose back is to the camera. The man is wearing a white button-down shirt. They appear to be in a professional or office setting. A blue semi-transparent box is overlaid on the left side of the image, containing white text.

# Do you know...

What I am passionate  
about?

My business?

My hobbies?

Significant dates in my  
life?

Other organizations I  
support?

Why I give?

It's not "just lunch"



IT'S JUST LUNCH



It's game time.



# #1 topic of conversation – ourselves



People spend 60%  
of conversations  
talking about  
themselves

Who and what influences their giving?

What aspects interest them most?

How might else may they give?

How do they want to give?

What communications do they want?

What (if any) services do they need?

What are their expectations of your org?

What inspired their first gift?

Who are they?

9 “must know’s” about donors

Always ask permission to ask questions

This shows respect for the donor,  
the topic and how you are using  
their time.

This is not the  
Spanish  
inquisition





"In order for me to get to know you better, [name], I'd like to learn about your interests.

Would you mind telling me more about the causes important to you so I can understand this better?"

# Every visit is a discovery visit!

## **Personal Interests/Lifestyle**

Tell me about your life.

What do you love about what you do?

## **Reasons for Giving**

Why did you first give to our organization?

What do you hope to achieve with your philanthropy?

What philanthropic gift has given you the greatest joy? How?

As you think about making a difference, what appeals most?

## **Knowledge of Organization**

What interests you most about organization? Why? What is less interesting to you? Why?

As you think about (this issue, the org, this program, the future) what are some of your worries? What are your hopes?

# Set goals for the visit...

The donor  
will feel...

---

The donor  
will know...

---

I will  
know...

---



# Be curious and strategic

- What is most important to them?
- Who should they meet in the organization?
- What must they experience?
- Are there particular programs or areas that interest them?
- What project could best match their interests?

# The Art of Persistence





92% give up after 4 tries

44% of people give up after 1 try

80% of new sales are made after the 5<sup>th</sup> contact

# Prep before the call

When,  
where, and  
plan B

p.s. we are setting an appointment, not making the case/ask on the call.



# Asking for the visit

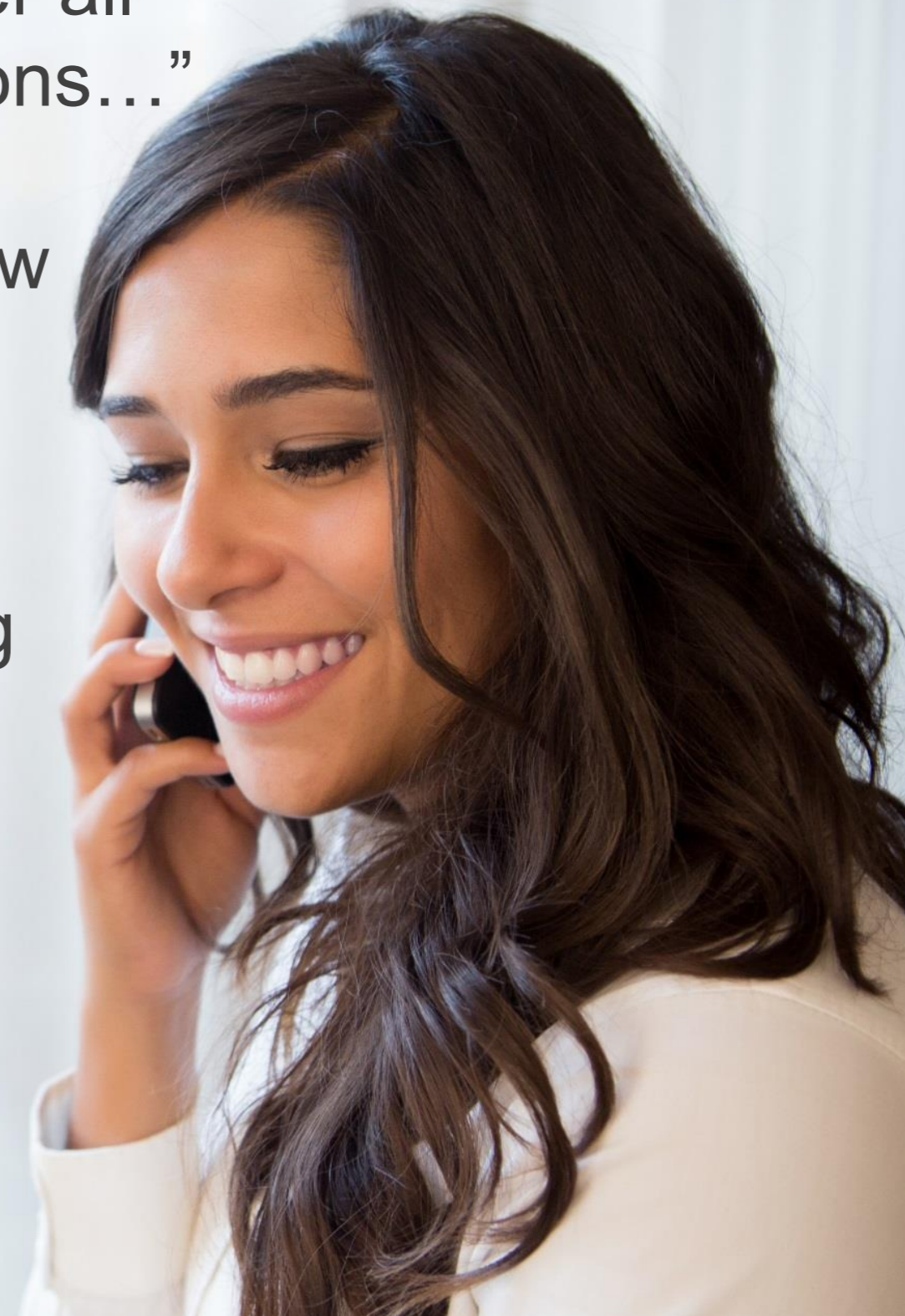
“Mr. Cantu, you’ve been a loyal supporter all these years. My job is to know our patrons...”

“Every donor has a story to tell about how they got connected with \_\_\_\_\_ .  
I want to hear yours.”

“I want to tell you how your gift is making a difference.”

“I want to seek out your advice.”

“I’m in your area and want to get better acquainted.”



# More help getting the visit

Meet donor at event

Board member introduces you

Another donor introduces you

Call to say thanks

Call to invite them to event

Pre-call letter



# Commit to a call routine

SMILE THE WHOLE TIME!



# Prep before the call

When,  
where, and  
plan B

p.s. we are setting an appointment, not making the case/ask on the call.





Call from different phones

Try before 9 am, at lunch or after 5pm

When you get the donor, ask for other #

Vary calling times

Ask the gatekeeper the best time to call

# Feeling nervous before a call or visit?

Amy Cuddy:

## Your body language shapes who you are

TEDGlobal 2012 · 21:02 · Filmed Jun 2012

Subtitles available in 43 languages

 [View interactive transcript](#)





OPRAH WINFREY

VS

HIGH POWER POSES



POWER POSES



# After 2 min power pose



**TESTOSTERONE**  
**DOMINANCE**



**CORTISOL**  
**STRESS**



## What the call is

Sharing passion  
Approaching people of  
means with an opportunity  
to make a difference

## What the call isn't

You aren't convincing them  
You aren't making an ask  
You aren't going to debate,  
argue or deny  
someone

Frame your approach



Google search, set up Google alert

Follow on Pinterest, Twitter, Google+

Search on Political Moneyline.com

LinkedIn search; add them to your network

Install Charlie + Crystal

Free discovery tools



That's it! I'll email your first briefing in a bit.

It might take a few hours while I do the prep work for your upcoming week.

View a sample briefing:



Ryan Holmes  
Hootsuite



@rachelmuir

Charlieapp.com



File

Message

Tell me what you want to do

Ignore Delete Archive Reply Reply All Forward Meeting More Quick Steps Move OneNote Actions Mark Unread Categorize Tags Follow Up



Charlie | rachel.muir@pursuant.com

**Good morning, Rachel - you have 1 meeting this Wed, Jan 18**

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Hey Rachel,

So if you and I scheduled a meeting together, would I have to research myself? Mind...blown... But really, what would happen

Here are your briefings for today:

3:30 pm [EVF Board Prep with Pursuant](#)  
Briefings on [Kim Schuy](#) and [Bob Colucci](#)

Cheers,

Charlie  
Rachel Muir's Assistant

PS, don't want emails on someone? [Edit your settings](#)

Kim Schuy  
Works at Essilor

Bob Colucci  
Works at Essilor

Invite friends

Kim Schuy

Works at Essilor



★ Ways to open the dialogue

1 **Comment** on Kim's company's recent news:

### European eyewear giants Luxottica and Essilor to merge



A new global eyewear giant is set to emerge as Italian frames maker Luxottica — home to popular brands Ray-Ban and Oakley — plans to join...

3 days ago via USA Today2h

2 **Comment** on their company's recent news:

### Essilor, Luxottica to combine, creating eyewear giant worth \$49 billion



PARIS—French optical lens maker **Essilor** International SA and Italian spectacle frames maker Luxottica said Monday they have agreed to...

3 days ago via Market Watch14h

3 **Comment** on Kim's company's recent news:

### Why The Merger Of Essilor And Luxottica's Cultures Is The Key To Extraordinary Value Creation



## See your recent emails with Kim

Connect your email (rachel.muir@pursuant.com) to see your recent emails, first email, and more

[Connect Gmail](#)

### Meetings

- 12 months ago: [Discuss slides for meeting](#)

[Browse all of your meetings with Kim](#)

### Kim in The News

---

*Blogs and news articles mentioning Kim*

#### [Executive Suite](#)

visionmonday.com6mon - 6 months ago

**Kim Schuy**

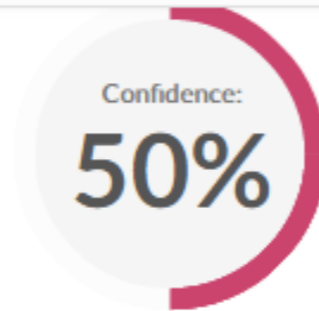
#### [Kim Schuy Named President, Essilor Vision Foundation](#)

essilorusa.com8mon - 8 months ago

The Essilor Vision Foundation (EVF) announced the appointment of **Kim Schuy** as its president. EVF, a 501(c)3 nonprofit, was founded in 2007 with the generous support of Essilor of America. EVF's mission, which has been aided by key partners including Alcon and Safilo, is to eliminate poor vision and its lifelong consequences by bridging the gap between need and access, and to provide vision services at no cost to the families most in need. Kim will replace Stephen Shawler, who has accepted a new role as Vice President of ECP Training and Insights in the Customer Development Group at Essilor of America.

#### [The CMO Club Announces Nominees for The 2015 CMO Awards](#)

By CMO CMO - thecmoclub.com1y - about 1 year ago



Rachel is a decisive, creative influencer: Forward-thinking, ambitious, and spontaneous with a natural aversion to rigid structure.

### Rachel's Personality

Rachel's **outgoing personality** gives her natural confidence when they walk in the room. She is **social, personable** and it is second nature for her to be a source of **energy** and **momentum** around the office.

#### It comes naturally to Rachel to...

Trust someone quickly

Speak very directly or bluntly

Prefer to create a document from scratch rather than edit an existing one

**Less discussion, more action.** That's how Rachel prefers to take on a new challenge. She might try to get the job done quickly and she appreciates praise and respect from peers.

#### Rachel is motivated by...

Peer recognition

Fun & excitement

Ambitious goals





See what happens to your emails  
after you press send

For Sales Teams

For Internal Comms

**New Features:** Attachment Tracking and Templates for Gmail

[Learn More](#)

Email tracking: [www.bananatag.com](http://www.bananatag.com)

Recipients

Subject

**RACHEL MUIR, CFRE**  
Vice President, Training Services

Ready to dramatically improve your training?  
Come to [training](#) or let us bring it to you.

  
**PURSUANT.**  
Direct: (214) 866-7747  
Mobile: (512) 970-7983  
[facebook.com/pursuant](https://facebook.com/pursuant)  
[twitter.com/pursuant](https://twitter.com/pursuant)

## Email Click Notification

### Email Details

Subject: Missing you at Broadmoor!

## Attachment Viewed Notification

### File View Summary

#### Location

Country: United States

Region: TX

City: Carrollton

#### Additional Information

OS: Windows 7

Device: Desktop

Browser/Client: Chrome 54.0.2840.71

#### Viewing Summary

Viewed for: 62 seconds

Pages viewed: 15/0 (Infinity%)

#### Events

- Nov 08 09:56:35 Document opened, page 1 viewed for 14 seconds
- Nov 08 09:56:51 Page 2 viewed for 0 seconds
- Nov 08 09:56:58 Page 3 viewed for 0 seconds
- Nov 08 09:57:09 Page 4 viewed for 0 seconds
- Nov 08 09:57:12 Page 5 viewed for 0 seconds
- Nov 08 09:57:15 Page 6 viewed for 8 seconds
- Nov 08 09:57:22 Page 7 viewed for 13 seconds
- Nov 08 09:57:36 Page 8 viewed for 3 seconds
- Nov 08 09:57:39 Page 9 viewed for 10 seconds
- Nov 08 09:57:48 Page 10 viewed for 2 seconds
- Nov 08 09:57:50 Page 11 viewed for 1 seconds

Sans Serif | ↑T | **B** | *I* | U | **A** | [List Icon] | [List Icon] | [List Icon]

**Send** | **Send Later** | **A** | [Paperclip] | [Refresh] | [Dollar] | [Image] | [Globe]

**Track** | [Paperclip] |  **Templates** |  **CRM**

# Discovery guide

[www.rachelmuir.com](http://www.rachelmuir.com)



## *Discovery Guide*

If we want donors to understand us we have to start by understanding them. Donors give for their reasons, not ours. We don't convince them. We help them realize they already care. Great discovery is the key to retain and upgrade our donors. To help you

What should I talk about?

# What you want to say

- About our mission
- Why we think you should support us
- What our values are
- Why we need your money
- How you can support us
- Our new approach
- Why we're different
- We've been in the news!
- How great we are
- We're on Facebook/Twitter



# What donors want to hear



- What you achieved with my \$
- Why I made the right decision to support you
- How we helped solve a problem
- That you value me
- That you think I'm special
- Options for how I can decide how I want to hear from you
- That you know why I give and what I care about
- That you remembered what I did and said to you

**Table 1: High Net Worth Donors Reporting Giving Based on Motivation**

<b>Motive</b>	<b>% Reporting</b>
Being moved at how a gift can make a difference	74.0
Feeling financially secure	70.8
Support some organizations or causes annually	68.5
An organization is efficient	68.2
Give back to my community	62.0
Volunteering for the organization	53.4
Political/Philosophical beliefs	48.8
Remedy issues affecting me personally	41.7
Religious beliefs	40.3
A need (giving spontaneously)	36.8
Tax benefit	31.7
To set an example to young people	28.3
Being asked	23.0

Source: Bank of America (2014)

“Talk too much about how wonderful things are since your organization got involved... and you leave out the problems your donors can solve.”

Jeff Brooks,  
How to Turn Your Words into Money



“ The donor is more interested in the good she can do than in the good the organization has done.”

Steven Screen

“

Donors don't give because you're excellent.

They give because *they* are excellent and *you help them realize their awesome selves.*

Jeff Brooks,  
How to Turn Your Words into Money



Doctors Without Borders - commercial

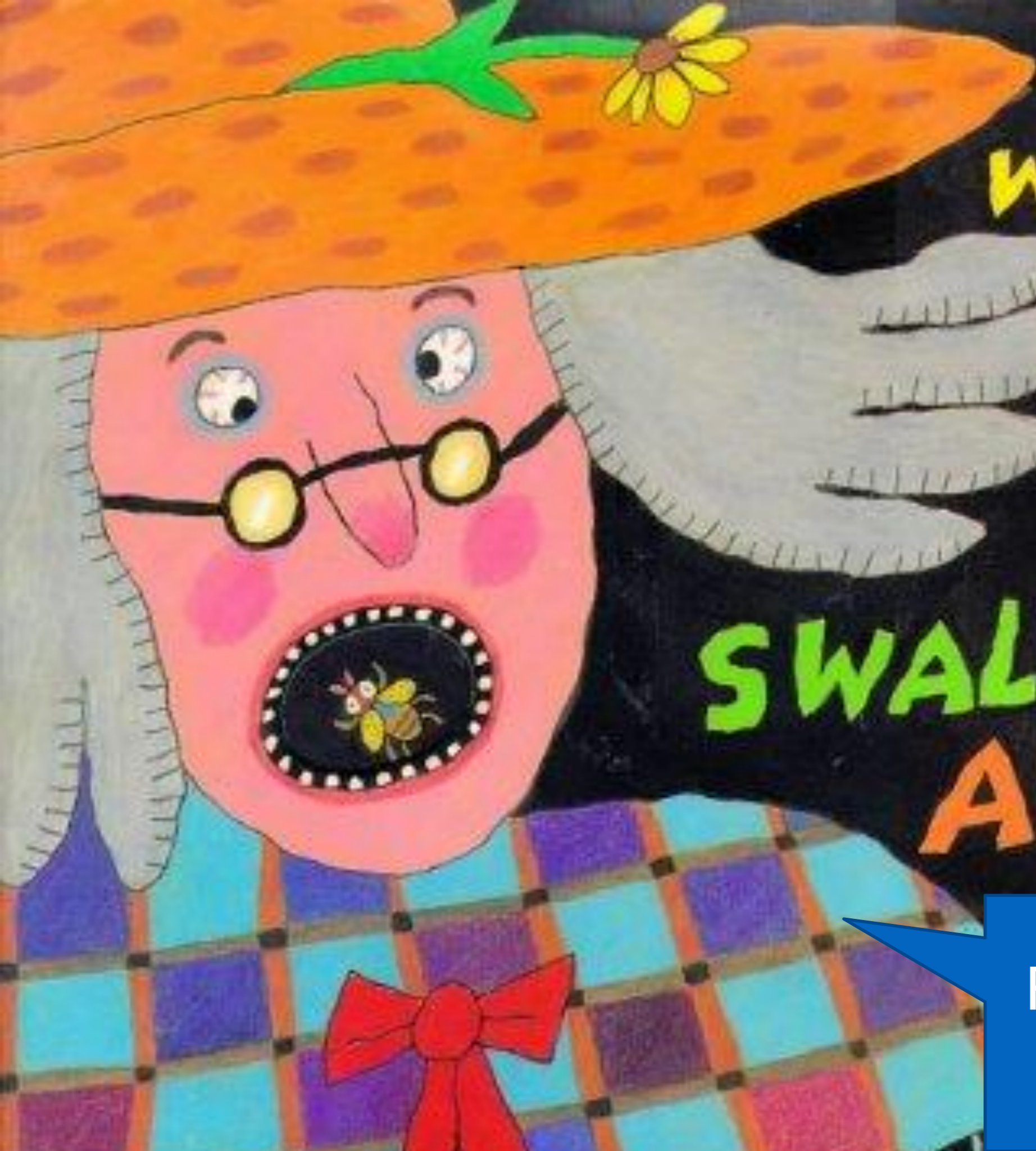


# “When you see....

A homeless person sitting on a park bench, or sleeping under a bridge, you wonder what you should do. That’s the kind of person you are.”

Source: Jeff Brooks, [How to Turn Your Words into Money](#)





THERE  
WAS AN  
OLD  
LADY  
WHO  
SWALLOWED  
A FLY

Remember this  
book?

# How it might look as an ask....

Will you do your part to help us prevent the often fatal tragedy of fly, spider, bird, cat, dog, goat, cow and horse swallowing?

# How it could look....

In the next few days, someone – perhaps someone you know – will have a serious accident and end up swallowing a live horse. You can imagine the pain as the horse kicks and thrashes on its way down. She'll die of course...unless you help rush the emergency care she needs.

- Big doesn't motivate
- Solvable does



*\*Except for large scale natural disasters*

# Remember....!

- Donors don't need training
- They need a problem
- It needs to be solvable
- They need to be the ones to solve it





Submit proposal

Tour

Share testimonial

Visit with stakeholder

Breakfast or lunch w/leadership

Invite to service, recital, event or program

Always have a next step

# Art of the Ask: Who, When, How & How Much?

How  
many  
visits  
before  
ask?

- 2-3
- Ask early and often
- No's tell you how to get to a yes

## Cues donor is ready

- Asking questions.
- Bringing their friends to your introductory events, offering to host.
- Giving you advice.
- Attendance at your programs/events.
- They start talking about themselves and your organization as "we."
- Updating you with a change of address.
- **Including a message with their gift.**
- They "hang around."

## How much to ask for

- Major gift is typically 10-20x an annual fund gift
- Americans typically give 2-3% of their income to charity
- Past giving
- Giving to other agencies
- Professional context
- Wealth screen
- Income producing assets

# What should I be prepared to answer?

1. How will their gift be used?
2. How is the project/program being funded currently?
3. Who else is being asked for the gift?
4. Why does the gift have to be made now?
5. Will the project be completed or the program started if the fundraising goal is not met?
6. Have your board members contributed to your organization?
7. How much does the organization spend on fundraising?
8. What percentage of their gift will be spent on the program versus administrative expenses?
9. Have corporations, foundations and government entities been asked to give?
10. Why do you work for the organization?

# Arc of the Ask



# Approaches to the ask

## WRONG way

---

- **Settle**
- **Confirm visit**
- **Talk AT the donor**
- **“We’re so great...”**
- **Introduce need**
- **Ask donor**
- **Silence**
- **Donor responds**

## RIGHT way

---

- **Settle**
- **Confirm visit**
- **ASK donor questions**
- **“Tell me more”**
- **Donor tells you**  
interests, you respond  
“I’m happy to hear that  
because you might be  
interested in...”

Be  
specific.

Aim  
high.

- Ask for a specific amount:
- *"Can we count on you for a gift of \_\_\_\_?"*
- *"How would you feel about a \_\_\_\_ donation?"*
- *"Would you be willing to contribute X?"*
- Be quiet. Let the donor ANSWER your question.

Save the touchdown dance for later...



# Turn objection into objective

“So our objective is to figure how you can give the gift you want to make while spreading the pledge payments to make your tuition payments easy. Is that it?”

“I can’t give to the campaign with 2 kids in college!”



Source: Marc Pittman, [Ask Without Fear](#)

How do  
you  
respond?

- They tell you they will give you the whole amount
- They tell you they will give you half.
- They tell you they will give you nothing.

Amount?

Timing?

“No.” Is it the....

Project?

Person?

“No’s” are  
your  
friend.

- They tell you how to get the timing right
- They tell you how to get the amount right
- They tell you how to get the project right

# Scenario 1



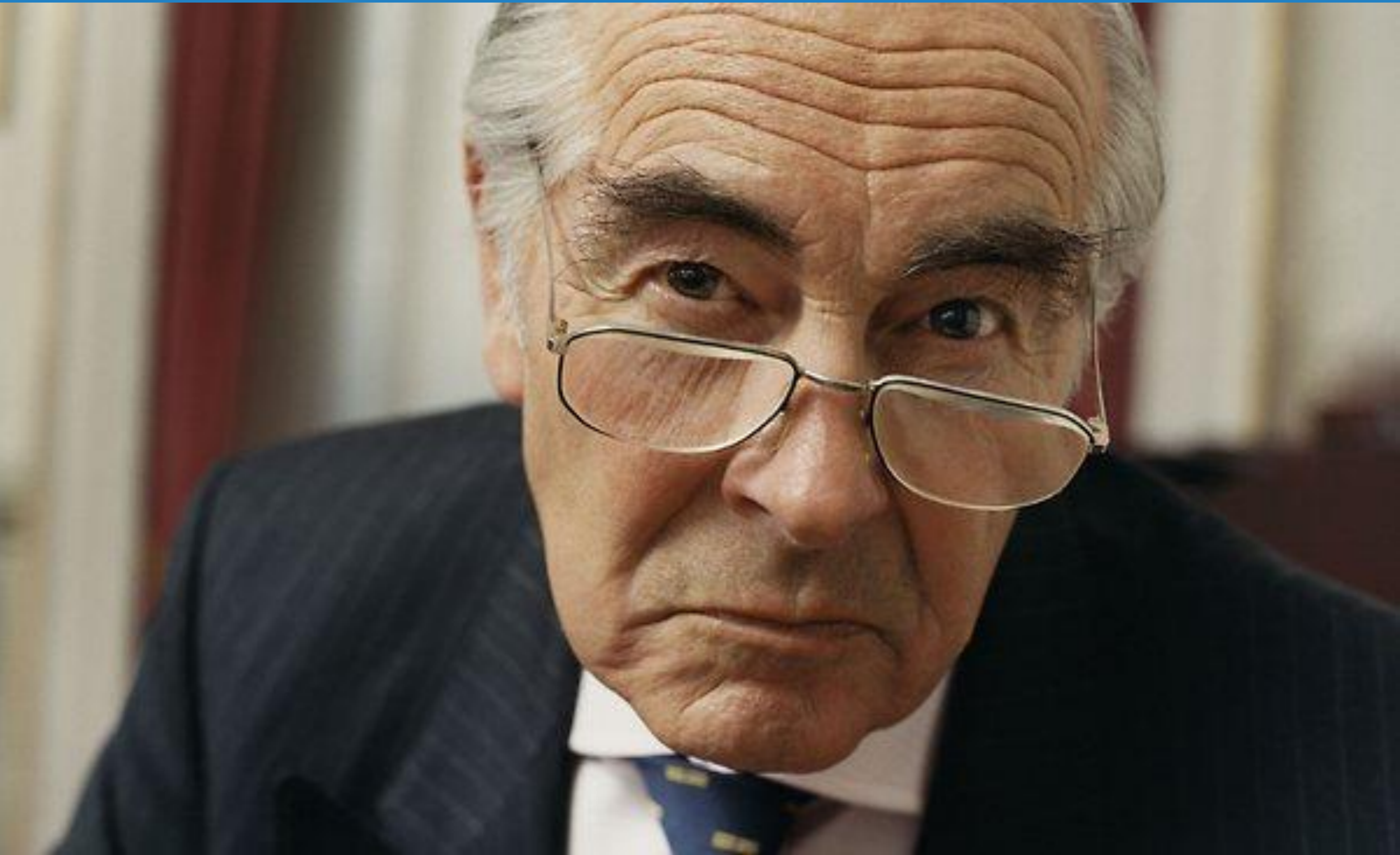
- Shawn Freeman came to the Children's Museum Gala as a guest of board member Mollie Butler. He raised the paddle for a \$15,000 vacation package.
- This was Shawn's first gift to the museum.
- Quick search reveals he and his wife have made several gifts in the \$25,000 - \$100k capacity.
- The Children's Museum is in the final phase of a capital campaign with 90 days to complete a matching challenge for \$500,000.

## Scenario 2



- Martha Johnson is a longtime supporter of Bark and Purr Animal Rescue.
- She is a partner at Vinson & Elkins law firm and makes a year end gift of \$500-\$1,000 each year.
- Her neighbor Cory McCallum is a board member at Bark & Purr and was partner at the law firm with Martha.
- He shared that Martha's love for animals was inspired by her grandfather.
- Cory left the firm recently and shared that his annual salary was \$250,000.

# Handling the difficult donor



“Can you help me figure out how to...”



# Discovery guide

[www.rachelmuir.com](http://www.rachelmuir.com)



## *Discovery Guide*

If we want donors to understand us we have to start by understanding them. Donors give for their reasons, not ours. We don't convince them. We help them realize they already care. Great discovery is the key to retain and upgrade our donors. To help you



Questions?

# THANK YOU!

Slides:  
[rachelmuir.com/handouts](http://rachelmuir.com/handouts)

Free webinars:  
[rachelmuir.com](http://rachelmuir.com)

[rachel@rachelmuir.com](mailto:rachel@rachelmuir.com)



[@rachelmuir](https://twitter.com/rachelmuir)

