

Fifty Shades Of Fundraising

Choosing Your “Safe Word” and Other
Tips for Making the “Ask”

By Carol Weisman

I was coaching two executives at a nonprofit a few weeks ago, and a problem came up in the course of the conversation. The development director accused the executive director of talking too much when they went together to solicit donors.

I asked the executive director if this was true, and he proceeded to blather on about how much he cared about the cause without so much as taking a breath or answering my question, proving the development director's point.

I suggested that it might be better at times to focus on the donor's passion and interest rather than his. That was the moment when the highly educational tome *50 Shades of Grey* popped into my mind.

I told them that they need a “safe word”—or phrase—that would signal the voluble executive to stop talking and let the development director step in and ask the donor a question. They chose the phrase “back at the ranch.”

When two people prepare to solicit a donor together, they need to plan ahead and coordinate their efforts to make the best impression and increase the likelihood of success. Here are seven more tips to working with a fundraising partner. Although none of them are likely to be included in a sequel of *50 Shades of Grey*, they can make a big difference when you and your fundraising partner are getting to know a donor or preparing to pop an important question.

Before the meeting with the prospective donor, sit down with your fundraising partner and create a strategy. Share everything you know about the prospect's giving history and interests.

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Set your goal for the meeting. Is this a “first date,” or are you going to make a specific financial ask?

Decide what materials you're going to bring and who will be responsible for them.

Decide who is going to start the conversation and who is going to ask what.

Create a set of questions to ask. These might include:

- You have given to a similar cause, Organization XYZ, in the past. Might our organization also be a good fit?
- What do you know about our cause? (You might find someone who has a personal connection or is an expert in the field, and this will radically change the conversation.)

Meet again at least 15 minutes before you walk in together. Get the chit-chat out of the way such as where you parked and updates on other issues. Review the donor's interests and history with your organization. When you walk in, you want to have a united front, open to listening.

Talk to your partner about who will do what with follow-up.

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