

Why on Earth Would a Major Donor Agree to Meet with You?

Here are four easy ways to get that all-important appointment with a major-gift prospect.

By Gail Perry

Don't you just love asking potential donors for appointments? Or do you hate it?

Sometimes you want to ask current donors to move from giving a little to giving much more. At other times, you want to contact a philanthropist who hasn't yet given to your organization. Either way, you know you need to meet to make the ask. And that means, first of all, getting an appointment.

If you dislike this step in the major-gift process, you're not alone. People often tell me that trying to get an appointment can be the worst part of fundraising. Folks say they feel pushy and inauthentic. Or presumptuous ("Why would they want to meet with little old me?")

Four Easy Ways to Approach a Prospect

Listen, my friend. Your cause is too urgent for you to hold back. So let's reframe this step and make it easy – even seamless – for you. Here are four easy ways to approach a potential donor. And two of them are even suggestions for approaching a totally *cold* major-donor prospect. (Yes, you can!)

1. If you happen to run into your prospect, ask for a quick visit.

You run into your donor at the grocery store, the golf course, the coffee shop, or an organizational event. You say,

"I've been thinking of calling you. I have an idea I'd like to run by you."

Why would your donor agree to meet? The answer could be for one, some, or all of the following reasons.

She is curious about your idea.

She loves your cause.

Her experience is that you're a charming, nice person to spend time with.

“Your cause is too urgent for you to hold back.”

She's flattered that you want her perspective.

She has been thinking about donating more money to your cause, and this gives her the opportunity.

2. Call your donor on the phone.

You say,

"You've been a donor all this time. I'd love to know why you're interested in our organization. I'd love to hear your story."

Why would your donor agree to meet?

He is thrilled and amazed that someone even noticed that he's been donating for a long time.

He would love to share his story.

Your organization has deeply impacted his life.

He feels a personal connection to your cause.

3. You meet a major-gift prospect, for the first time, at one of your organization's events.

You say,

"Mr. Jones, it's so nice to meet you! How did you come to be here at our event?"

You generate a conversation. You find out his hot buttons about your cause. Then you ask,

"Would you like to have an insider's tour of our organization and see the work we do in your area of interest?"

Why would this donor agree to meet?

He wants to hear more about his area of interest.

He's grateful for your invitation and excited to learn more about your organization.

He has a perspective that he wants to share with you.

4. You meet a cold prospect who is a mega philanthropist in your community.

And you say,

"Ms. Fletcher, thank you for all you do for our community. My organization is xxxxxx nonprofit. We're thinking about launching a new initiative to do xxxxxx in our community. I would so appreciate it if I could run it by you and get your perspective. I would really value your opinion."

Why would this donor agree to meet?

You flattered her by asking for her input and advice.



“Let them think that *they* are going to be doing the talking.”

She does have some opinions and a perspective she wants to share with you.


She may be curious about what you're up to.

As a community leader, she likes to know what's going on!

It's All about Perspective

All these scenarios can work for you if you have the right attitude. Think positive! If you want to change the world, you need a lot of people on your bandwagon.

Treat your prospects politely, let them set up the time and place for the meeting, and let them think that *they* are going to be doing the talking. (And when you get together, *do* listen more than you talk.) Consider the situation from their perspective.

Remember this above all: Your prospect may be wildly passionate about your cause – and you don't know it! How can you find out? You have to ask. 

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