



fundraising academy

CAUSE SELLING EDUCATION



Wednesday, May 19, 2021

What to Ask and When to Ask It: Questioning Strategies for Donor Conversations

Moderated by:



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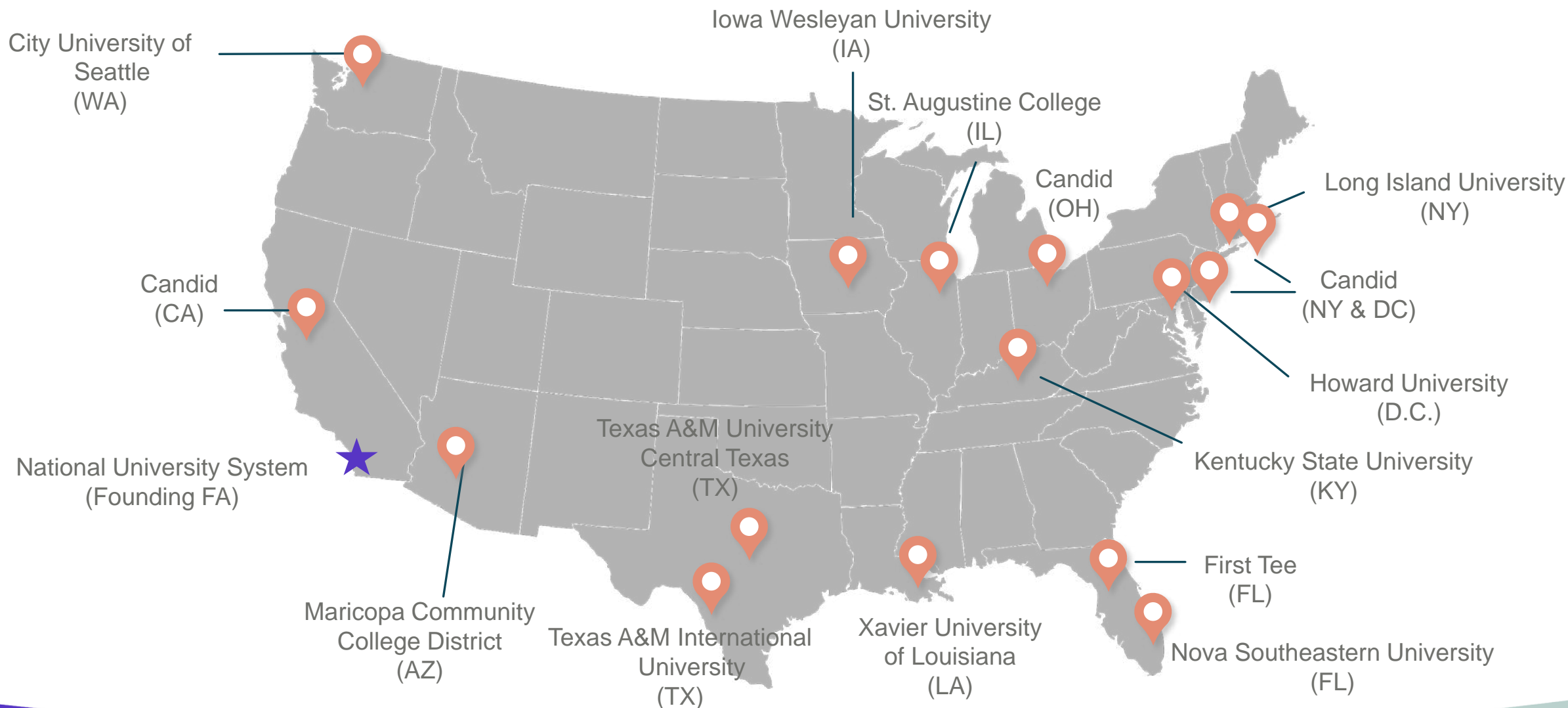


FUNDRAISE

YOU'VE GOT A CAUSE.
LEARN HOW TO FUND IT.



Our Affiliate Partners



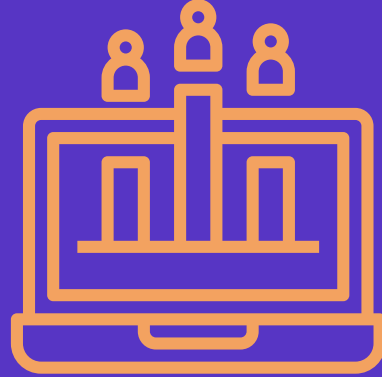


Meet Your Presenter:

Tim Hogan

Vice President, Strategic Partnerships
Roadtrip Nation

POLL: Tell us about yourself!



How many years of fundraising experience do you have?

Objectives



- Learn a 5-step strategy for asking questions



- Appreciate the importance of developing genuine listening skills



- Discover questioning techniques that build trust

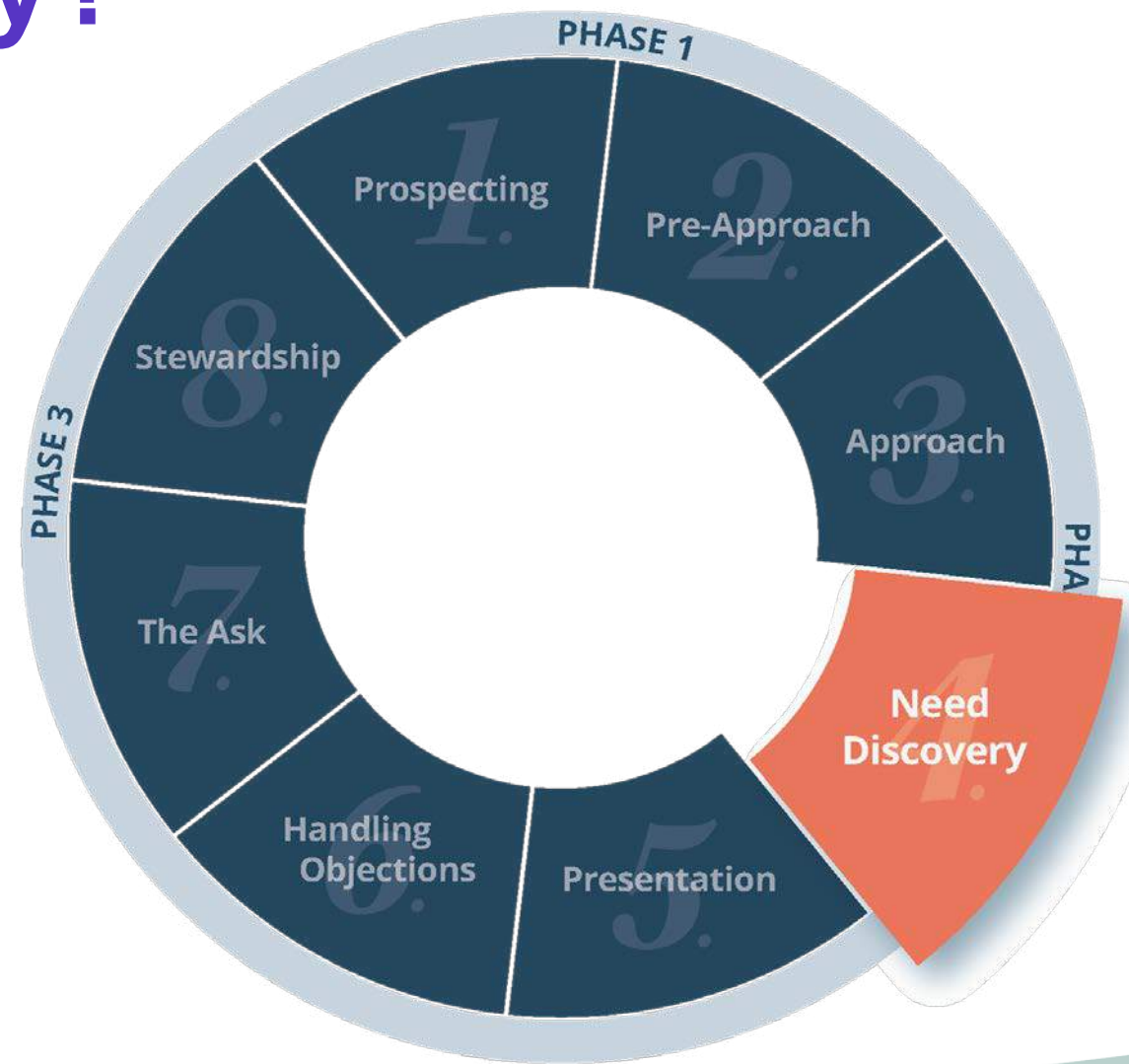


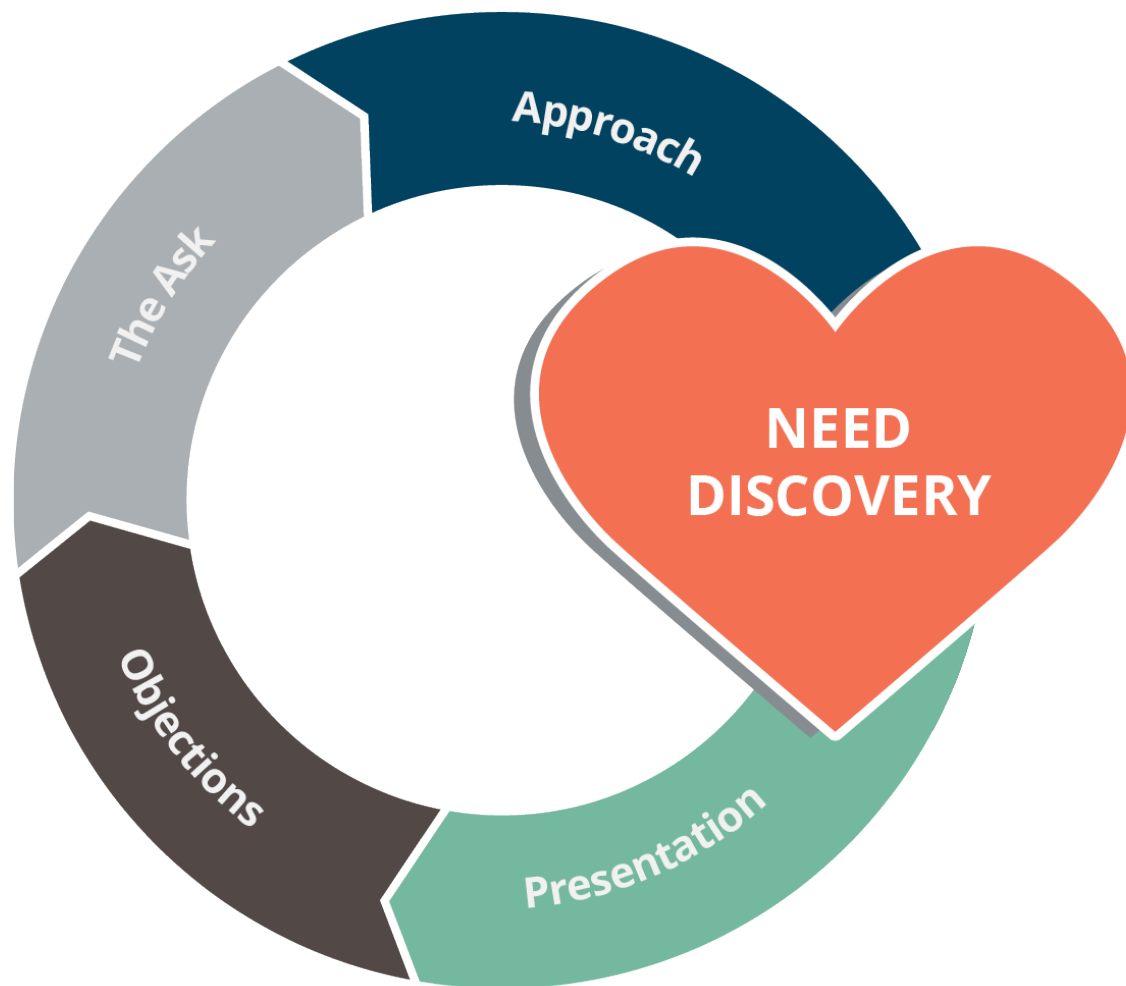
- Learn how to listen between the lines

What is Need Discovery?

The process of becoming aware of the **essential connections** between your prospect and your cause.

*Don't convince; don't tell –
Discover with them*





The Cause Selling Cycle won't work without its heart.

Because the entire process should be focused on the donor, the Need Discovery step is the critical step! It's there for you to ask questions and get to know your donors so that you can discover what matters most to them.

Develop a Questioning Strategy

Four Main Objectives

1. Discover the donor's "hot button"
giving motives
2. Build rapport and **foster trust**
3. **Agree on the key problems**
that organization is currently
addressing
4. Ensure the donor has the ability
to make the **donation decision**

5-Step Need Discovery System



Step One: Plan Your Questions

- **Establish trust** – asking questions is a great way to begin
- Learn whether a prospect is **enthusiastic or undecided** about your cause
- Identify the **prospect's role** in the decision
 - *Major donor, corporate executive, grant-maker, staff, board member*
- Choose targeted questions that are **easy to answer** and **free of technical jargon**

5-Step Need Discovery System

Step Two: Prepare for Responses

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- Know the general types of answers:
 - Improve your **confidence**
 - Help keep process running **smoothly**
 - Prepare **transitions** from one question to the next

5-Step Need Discovery System

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Step Three: Establish a Clear Agenda

- **Critical step** in pre-ask meetings
- Takes **pressure off** first encounters
- Current end goals center only on **relationship building, information gathering, and educating**

5-Step Need Discovery System

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Step Four: Get Permission to Ask Questions

- Help set the desired atmosphere by asking permission

Example: *“I believe by the end of our time together today, you will have a clear understanding of why we have such a loyal family of supporters, but in order for me to be sure, and to learn more about you, would it be okay if I ask you a few questions?”*

5-Step Need Discovery System



Step Five: Question with a Purpose

- Proceed with your line of questioning logically, **one topic at a time**
- Phrase each question to produce the maximum amount of **information**

A photograph of a woman with curly hair and a man with a beard and glasses shaking hands. They are both smiling and looking at each other. The background is a brick building with large windows. The image has a light blue overlay.

Role Play

Invite Participation from the Start

How to Ask Good Questions

Closed-Ended

Have you ever given to this organization?

Have you felt appreciated as a donor in the past?

Is our organization one of your top three priorities?

Open-Ended

I would love to hear more about why you give to our organization.

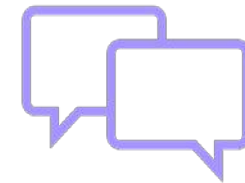
What was something an organization did that made you feel appreciated as a donor?

What organizations are your philanthropic priorities?



Personal Questions

Example: How would you describe your personal mission?

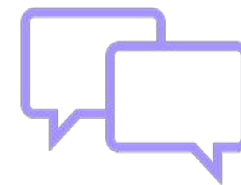


Share your questions in the chat!



Philanthropic-Centered Questions

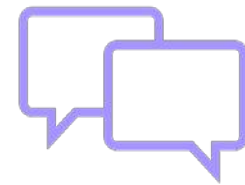
Example: What impact are you trying to make through your philanthropy?



Share your questions in the chat!

Cause-Centered Questions

Example: What is it about our mission that speaks to you? Why now in particular?



Share your questions in the chat!

Fundraisers don't convince donors. They help donors realize that they already care.

Questioning Techniques

1. Clarification Questions

- Double-check
- Silence
- Nonverbal Cues
- Continuation Questions

2. Summary Questions

3. Agreement Questions

Key Donor Questions

The Motivation Question:

Why are you passionate about what we do?

The "Right Fit" Question:

What helps you decide which organizations to support?

The Success Question:

What do you want to achieve?

The Frustration Question:

What do you want to avoid?

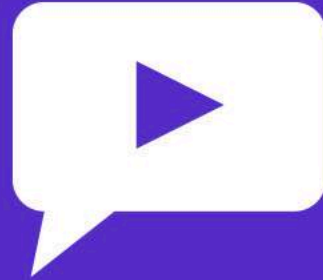
The Commitment Question:

How involved do you want to be in making this change happen?

SUMMARY

- Need Discovery lays the **groundwork** for the **presentation and the ask**.
- Ask **thoughtful questions** to get to the **heart** of what drives your donors.
- Use pre-approach information and the **prospect's social styles** to help determine the questions you ask.
- **Listening** is a critical skill.





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QUESTIONS?

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CONTACT TIM:



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THANK YOU

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