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## Seven Secrets of Successful Solicitations



Date: August 25, 2016  
Time: 1:00 – 2:30 Eastern Time  
Presenter: Anne Melvin  
Director of Training and Education  
Alumni Affairs & Development  
Harvard University



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## Agenda

1. Role of fear and hope
2. Solicitation prep work
3. Start with a strong foundation for your ask
4. Urgency
5. Leverage
6. Solicitation 301: Getting out the toolbox
7. Responding effectively to resistance

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## Agenda

Rule of “000’s”  
You will be a ‘Solicitation Whisperer!’

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# FEAR



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# FEAR

You are not at the center of the prospect's universe



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## Confidence is the Enemy of Fear



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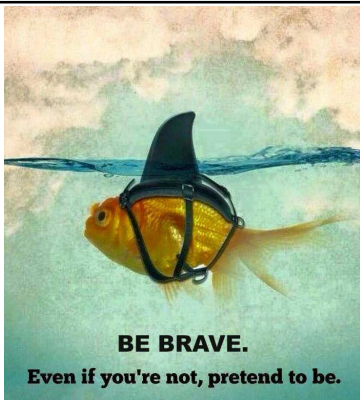
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**BE BRAVE.**  
Even if you're not, pretend to be.

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## Secret # 1: Hope



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### Secret # 2: Asking is Like Painting...



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### Secret # 2: Asking is Like Painting... It's All About the Prep Work!



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### Secret # 2: Solicitation Prep – Goal and Vectors



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### Secret # 2: Solicitation Prep – Goal

**Is your goal *really* a gift?**  
...then why are you offering more information?  
...then why are you offering oodles of time?  
...then why are you skirting around the ask?  
...then why are you allowing the conversation to wander away from the ask?



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### Secret # 2: Solicitation Prep – Goal and Vectors



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### Secret # 2: Solicitation Prep – Vectors



"Yes."  
"No."  
-PITA  
"Maybe."  
"I need to think about it."  
"I need to talk about this with my husband/wife."  
"Would love to do it. Too big a gift."

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### Secret # 2: Solicitation Prep – Vectors



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### Secret # 3: Start with a Strong Foundation



**Catchphrases = Confidence**

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### Secret # 3: Start with a Strong Foundation

“Anne, we’d like you to be a co-chair. Co-chairs need to be at the \$100,000 level to set the bar high for the class. They also convene class meetings, help solicit other committee members, and lead the team as we move through the campaign. Will you do that for us?”

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**Secret # 3:  
Start with a Strong Foundation**

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**Secret # 3:  
Start with a Strong Foundation**

"Anne, we'd like you to be a co-chair. Co-chairs need to be at the **\$100,000 level** to set the bar high for the class. They also convene class meetings, help solicit other committee members, and lead the team as we move through the campaign. Will you do that for us?"

**Don't Step on the Ask!**



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### End with the Ask

"Anne, we'd like you to be a co-chair. What a co-chair does is show the class the way forward, convene class meetings, help solicit other committee members, and LEAD the team as we move through the campaign. They set the bar high for the rest of the class which is why we ask that the co-chairs personally commit to a gift of \$100,000. Will you do that for us?"

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### End with the Ask

"Anne, we'd like you to be a co-chair. What a co-chair does is show the class the way forward, convene class meetings, help solicit other committee members, and LEAD the team as we move through the campaign. They set the bar high for the rest of the class which is why we ask that the co-chairs personally commit to a gift of \$100,000. Will you do that for us?"

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### End with the Ask

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**If you want the CASH,  
end with the ASK!**

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### Secret # 3: Start with a Strong, Confident Foundation



**Confidence.....?**

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### Secret Bonus Tip!

**Frame your solicitation as a way to help your prospect**



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### Secret # 4: Urgency



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### Secret # 4: Urgency

**Major gifts:**  
Limited time opportunity for gift



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### Secret # 4: Urgency



**Planned gifts:**  
Limited time opportunity for gift

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### Secret # 4: Urgency

**Planned Gift**



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### Secret # 4: Urgency

Limited time opportunity for mission



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### Ask this Question...

"If this gift doesn't happen, then happens."



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### Secret # 4: Urgency

Outline the future



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### Secret #5: Leverage



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### Secret #5: Leverage



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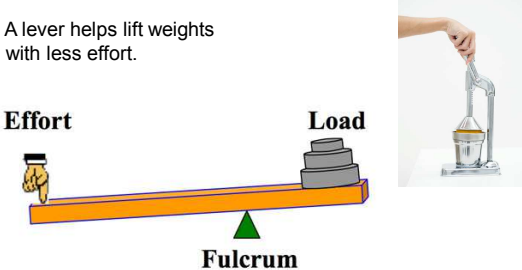
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### Secret # 5: What is Leverage?

A lever helps lift weights with less effort.



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### Secret #5: Leverage

What is it with your prospect?



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### Rhetoric: the Art of Persuasion

1. **Logos**: persuasion using logic or reason
2. **Ethos**: Persuasion by the character of the person or the leader who embodies the values or characteristics of the group
3. **Pathos**: persuasion by causing the listener to feel strong emotions

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### Poll #1

Which realm of rhetoric is most to least persuasive to humans?

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### Poll #1 Answer



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### Secret # 5: What is Your Leverage?



- Mission?
- Class or community leader?
- Project?
- 'Ethos' of leader?
- Tax event? Life change?



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### Secret # 5: What is Your Leverage?



- Social proof?
- Carrot?
- Stick?
- Scarcity or Urgency?

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### Secret # 5: Leverage Using Leadership

**Now that's Leadership!**



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### Secret # 5: Leverage Using Mission

**Mission**



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### Secret # 5: Leverage Using Ethos

**Ethos: the leader who embodies the values of the organization**

**The 'buddy ask'**



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## Secret # 5: Leverage



**“Parroting”:** In the solicitation use the prospect’s own words, phrasing, reasoning

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## Secret bonus tip!

### Thank and Ye Shall Receive



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### Secret # 6: Get Out the Toolbox – Gift Range History

	Class of 2001		Class of 2002		Class of 2003		Class of 2004		Class of 2005	
	Bloomfield FY06	Rice FY07	Alton FY08	Mauler FY09	Alton FY10	Alton FY11	Alton FY12	Alton FY13	Alton FY14	Alton FY15
<b>Gift Range</b>										
\$100,000+	2 \$300,000	3 \$386,000	1 \$250,000	3 \$354,999						
\$50,000+	3 \$150,000	1 \$50,000	2 \$101,000						3 \$175,000	
\$25,000+	1 \$25,000		1 \$27,000						2 \$50,000	
	6 \$475,000 76%	4 \$436,000 81%	4 \$378,000 68%	3 \$354,999 70%					5 \$225,000 33%	
\$10,000+	1 \$10,000		6 \$75,000	2 \$30,000					6 \$60,000	
\$5,000+	11 \$18,210	5 \$27,500	7 \$36,150	4 \$22,800					10 \$50,000	
	12 \$68,250 11%	5 \$27,500 5%	13 \$111,150 20%	6 \$52,800 10%					16 \$110,000 26%	
\$2,500+	5 \$14,500	6 \$16,250	1 \$2,500	12 \$34,400					5 \$13,760	
\$1,000+	33 \$35,275	22 \$24,250	22 \$22,775	25 \$29,210					39 \$42,830	
	38 \$49,775 8%	28 \$40,500 8%	23 \$25,275 5%	37 \$63,610 13%					44 \$56,590 13%	
< \$1,000 C.E.I.	484 \$33,004	442 \$33,311	486 \$44,222	410 \$37,080					433 \$29,192	
	484 \$33,004 5%	442 \$33,311 6%	486 \$44,222 8%	410 \$37,080 7%					433 \$29,192 7%	
<b>TOTALS</b>	540 \$626,029	479 \$537,311	526 \$558,647	456 \$508,489					498 \$420,782	

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### Secret # 6: Get Out the Toolbox

Up the Ante

**\$5K**  
cash            **\$25K**  
CGA

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### Secret # 6: Get Out the Toolbox

Up the Ante

**\$25K**  
cash            **\$100K**  
CRUT

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### Secret # 6: Toolbox Tricks: Speak English, Not 'Planned-giving-ese'



(Psst! Use ANALOGIES)

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## Secret # 6: Toolbox Tricks

Analogy



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## Poll #2

Where will your biggest gifts come from?

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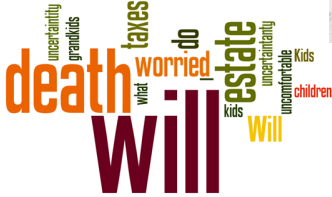
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## Secret Bonus Tip!



“Will” is NOT a four-letter word!

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**The Bequest Conversation:  
It's Not an ASK, It's an INQUIRY**



"John, Thank you for your support over the years.  
Many alumni who have given as generously as you have included our organization in their will.  
I'm curious...what are your thoughts on that?"

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**Poll #3**

What's the best way to respond when a prospect says "no" to a gift?

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### Secret # 7: Respond Effectively to Resistance- Ask Questions

Don't give into resistance; respond to it.

Ask questions.

Identify the prospect's concerns: "PITA"

1. Is it the **P**roject?
2. Is it the **I**nstitution?
3. Is it the **T**iming?
4. Is it the **A**mount?



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### Secret #7: Respond Effectively to Resistance



Use the prospect's own words.

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### Secret #7: Respond Effectively to Resistance



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### Secret #7: Respond Effectively to Resistance -The Pivot

Reframe the conversation:

- Change the field of battle
- Move from the present to the future
- Agree with the prospect and posit another way of looking at it ('and' not 'but')
- Expand, don't contract the discussion – big picture not picayune point

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### Questions and Answers



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### Still Have a Question?



**Contact:** Anne Melvin  
**E-mail:** [anne.melvin@alumni.williams.edu](mailto:anne.melvin@alumni.williams.edu)

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