

PG Calc | YOUR PARTNER IN PLANNED GIVING SUCCESS

Strategic Conversations Lead to Planned Gifts



Date: February 25, 2021
 Time: 1:00 – 2:30 Eastern
 Presenter: Karen Osborne
 Senior Strategist,
 The Osborne Group, Inc.

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Agenda

1. Define our goals and terms
2. Discuss context
3. Q and A
4. Strategic Questions
5. Generative Questions
6. Listening
7. Q and A
8. Planning Strategic Donor Visits
9. Power and Role of Stewardship

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Meaningful and Productive Relationships




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Your Ability to Line Up the Rights

- "Right" purpose
- "Right" amount
- "Right" solicitors
- "Right" time
- "Right" place
- "Right" participants
- "Right" materials



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The Roles of Big Ideas, Vision, and "Why"

- New study confirming what we know* Leadership Story Lab, 2021
 - ✓ Donors want to solve societal problems
- Start with Why – Simon Sinek
- Unquestioned priorities for PG donors
- Vision + Unquestioned for layered solicitations




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Planned or Layered?



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Uncover early in relationship, long before the solicitation ...

Is There a Problem PG Can Solve?

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Assumptions and Biases



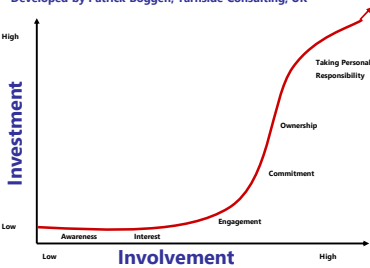
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The Tarnside Curve of Involvement

*Developed by Patrick Boggen, Tarnside Consulting, UK



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Engage the Whole Person

"All In"

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Meet Your Philanthropic Goals

- Secure the largest gifts possible
 - In the shortest time possible
- For an organizational priority
 - In an ethical and professional manner
- Resulting in Inspired,
- Joyful, Generous Gifts

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In the Context of a Written Strategy

- Donor Plan
- Visit Plan

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Strategy


- Carefully designed or planned to serve a particular purpose or advantage.

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Questions?



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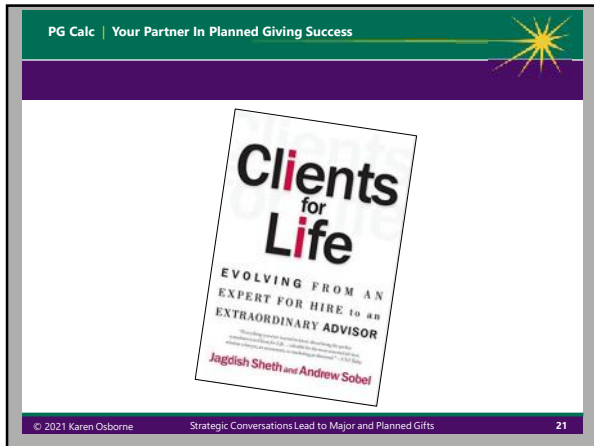
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Extraordinary Relationships are Based on Great Conversations*
*Carol and Patrick

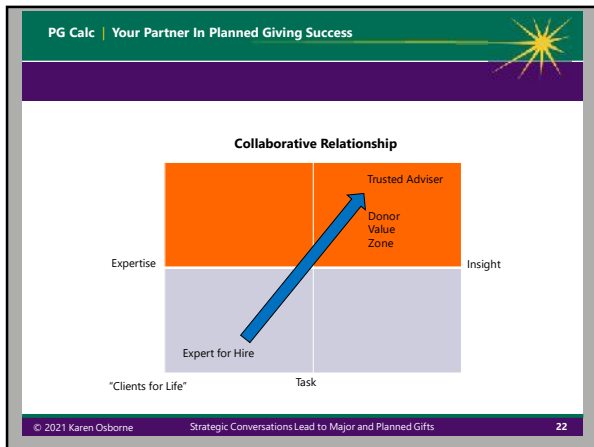
1. Stop presenting and pitching
2. Start listening to understand
3. Bring passion and emotion into your conversations
4. Make sure you are discussing the right topics

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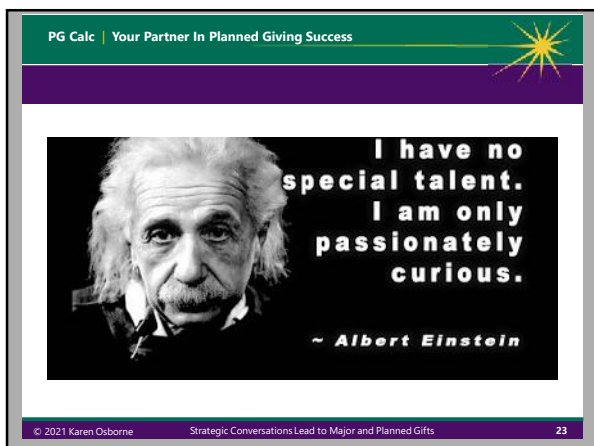
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Poll Question #1

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Poll Question #2

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Listening Fixes

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Asking Strategic and Generative Questions

“Questions are the language of strategy”
Harvard Business Review

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Purpose of Your Visit – Questions and Key Points

1. Discovery
2. Building a new relationship
3. Advancing an existing relationship
4. Moving toward solicitation
5. Closing

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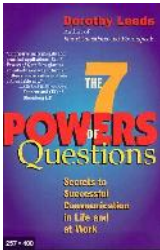
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Powerful Questions

Powerful Questions*

*Dorothy Leeds

- Demand answers
- **Stimulate thinking**
- Provide needed and invaluable information
- Put you in control
- Get people to open up
- Lead to quality listening
- **Get people to persuade themselves**



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Strategic Questions Uncover Information

- Motivations
- Decision-maker(s)
- Values
- Potential issues
- Engagement and stewardship preferences
- List of organizations and your place on the list
- Opinions about your organization
- Inspire the donor or potential donor to speak about your cause, organization, leadership, IMPACT
 - Selling themselves

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Generative Questions

When You Ask Generative Questions, It Allows Space To Open Up and Lets You Co-Create A Future With Greater Outcomes

What if? I wonder? What would it take?

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How You Ask Matters

Frame



Ask Permission




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Flow and Segues



- Start broad – generosity, philanthropy, decision making, concerns
- Move to organization, institution mission, vision, leadership, and work
- Then to purpose – impact and outcome

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Types of Questions

Types of Questions*

*Neil Rackham


- Open ended and closed
- New information
- Clarification
- Confirmation
- Attitude and Values
- Implication
- Commitment

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The Importance of PROBING, Unpacking!



LISTEN CAREFULLY



ASK A FOLLOW-UP QUESTION



GO DEEPER UNTIL YOU UNDERSTAND INTENT

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Gathering More Information

Getting Her Thinking

1. *Some of our supporters believe it is important to leave respected and beloved charities in their wills. What are your thoughts? How does your family feel about that?*
2. *We're listening to and sharing the philanthropic life stories of our most loyal donors, people just like you. I'd love to hear about your philanthropic journey. How did you learn to be generous? What have been your best experiences?*
3. *How important is it to you to continue that legacy? Can you say more about that?*
4. *If we could help you continue that legacy, would you be interested in learning more?*

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More Gift Planning Questions

1. *May I ask, what roles do your children (grandchildren) (financial planner) (lawyer) play in your philanthropic decision-making?*
2. *What issues do you weigh (did you weigh) when you are making decisions about your estate plans?*
3. *To what extent do your current interests dovetail with those your spouse had when she was alive? How important is that for you?*
4. *May I ask, what other organizations are included in your estate plans? How did you decide who and how much? Where do we fit among them?*
5. *Who else knows about your wishes? How do they (he, she) feel about that? How supportive are they? We'd love to meet them. How might we arrange that?*

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Formula for Success



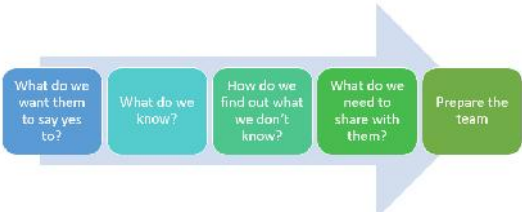
- Proven Practice + Innovations – Unworthy Activities = Success!

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Five Step Visit Prep



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graph LR
    A[What do we want them to say yes to?] --> B[What do we know?]
    B --> C[How do we find out what we don't know?]
    C --> D[What do we need to share with them?]
    D --> E[Prepare the team]
  
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Closing the Visit Loop

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Stewardship – Your Superpower

- Thanking
- Documenting facts and motivation
- Stewarding ALL investments (time, money, ideas, service, connections)
- Recognizing
- Sharing impact and outcomes
- Engaging with impact and outcomes


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Important!

- Make the donor the hero of the story
- Use visuals
- Have a calendar
- Be authentic
- Personalized
- Surprise




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Stewardship Matters More to You Than Everyone Else


- Loyal donors leave us in their wills
- Most major donors make five smaller gifts prior to their first major gift
- You have to be at the table when stewardship plans are made



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Still Have a Question?

Contact: Karen Osborne
Email: karen@theosbornegroup.com
Phone: 914-428-7777

Content by Karen:
Website: www.theosbornegroup.com
Author Website: www.kareneosborne.com
YouTube Channel: Karen E. Osborne
LinkedIn: Karen E. Osborne
Twitter: @kareneosborne

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