

First, Know What You Do (Part II)...Getting Funded Is Easier When You Can Communicate Your Scope

By

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In a recent article First, Know What You Do (Part I): Getting Funded is Easier When You Can Communicate Your Scope, I wrote about how to construct a clear, succinct and compelling presentation about your organization's scope. The reason bears repeating: People are focusing on immediate crisis needs. If you're not telling donors clearly what your organization does, your fundraising may suffer.

This article will address the question "How do I actually use this presentation when I'm meeting with the prospect?" This article assumes you've done this work and are ready to meet with the prospect.

Before you start, here are some general tips:

~ You can either use the presentation itself or not. You can print it out - remember it's only 15 slides long so it doesn't have an intimidating feel - and give a copy to each person there. If you can insert graphics and print it in color, so much the better.

~ You could also do the presentation from memory. That shouldn't be too difficult if you've really prepared it well. If this is your first experience, I suggest using the printed copy. Prospects won't mind at all. In fact, many will be pleased to know that you have something concrete to present.

~ Look at and talk to the prospect. Try to engage him/her. If the prospect asks a question, stop and respond. Ask the prospect a question about his/her question. This is not a lecture. You want the prospect to talk.

~ Make your presentation lively and energetic. Enjoy yourself and enjoy the prospect.

~ Express the strong feelings you have for your organization and its work. Don't short-change yourself or the organization.

~ Don't spend too much time on one topic. Don't talk aimlessly or lackadaisically. The whole presentation might take an hour, but the rest of the time is conversation, not presentation.

~ You're ultimately trying to get the prospect to identify those things about your mission and programs that he/she thinks are most important. Why? Because those are the things he/she would most likely be willing to support financially.

So let's begin the presentation itself:

Mr./Ms. Prospect, today I'd like to talk with you about our mission and why we exist, our programs, and how we implement our mission, and finally, the plans we have to improve our ability to carry out that mission. The purpose of the presentation is threefold: 1) to give you the big picture; 2) to get your candid comments on what we are doing; and 3) to get you more involved. My goal is to get through my part in 15 minutes or less. Is this OK with you?

At the end of the mission portion, ask the prospect something like "How much of this were you aware of?" or "How much of it is new to you?" Close with "This is pretty important work, isn't it?" Wait for the answer "Yes." Respond to any prospect comments or questions.

Now describe the programs:

Now I'd like to describe how we actually implement our mission.
You then lay out the major areas of programs and provide an overview of the budget.

The prospect will undoubtedly ask questions ABOUT THE THINGS THE PROSPECT THINKS ARE IMPORTANT OR THE MOST INTERESTING. This is key.

You are looking for the prospect to identify his/her interests. When the prospect asks about a particular program or makes a comment, remember it and ask your own follow-up questions. "What makes you think this is so important? Did you know we had this kind of program and carried it out this particular way?" You should be in the middle of an absolutely amazing conversation at this point.

Close with: "Which of these do you think is most important? Or "How do you think we're doing carrying out our mission with these programs?" Again, listen and respond to the prospect's comments.

Now for the good part - current initiatives. Say something like this:

We're constantly looking for ways to improve the work we do. Let me give you some ideas of what we have on the drawing board.

Remember you've got 3 slides left and 3 minutes, so be snappy. Lay out the things you really need to improve or programs you want to expand or new programs to start. Don't dwell too much on any one - unless it's one the prospect wants to talk about! Be sure to include some fundraising-related current initiatives. "One of our initiatives is to increase voluntary support;" or "...to fund this new program."

Again, you have to listen. In laying out current initiatives, you want to emphasize the current initiative that reflects the prospects interests. If there was something about the mission or the programs that seemed particularly important to the prospect, emphasize that initiative.

Close with the question:

We'd be doing even better work if we could implement these initiatives; don't you think so?

If you're using this as an introduction for a solicitation, you can say:

"One final question, Mr./Ms. Prospect. We'd like you to consider helping us out with <THE INITIATIVE THE PROSPECT SHOWED INTEREST IN>. What could we do to get you to consider a gift to help us with this initiative?"

Again, listen and respond. Closing is way beyond the scope of this article, but the goal of this article is to get you "in position" to close.

So to summarize:

1. Develop the presentation as described in my previous article.
2. Making the presentation.
3. Close.

Thank the prospect: Thanks very much for your attention and your very perceptive comments. I look forward to seeing you again.