

The Conversational Ask:

**An Easier Way to Raise Money
from Happy Donors**

And meet your year-end goal²!

By Gail Perry



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- Philanthropy expert, speaker, author, consultant, coach
- 30+ years experience in major gift fundraising
- LinkedIn Top Voice in Philanthropy
- Coached 60+ capital campaigns
- Top 10 America's Fundraising Experts

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Gail Perry Group

Helping organizations
change the world!

- Leading successful **capital campaigns** for organizations of all sizes.
- Inspiring thousands of board members and CEOs through our workshops and **board retreats**.
- Clients include universities and independent schools, medical, social services, arts and culture, environmental, animal, science and research.
- Major Gifts Intensive 5-Months of coaching and training, February 2025.



The Conversational Ask

- Post-Pandemic Donors
- Where to begin your year-end work?
- Steps in the Gift Conversation
 - Their Donor Story
 - What resonates with them most?
 - Want to get more involved?
 - Ask for advice
 - Would you like to know how you can help?
 - Is this a good time to discuss your support?



**Post pandemic donors are
less patient with:**

**pitching or selling
or "arm twisting"**

Tone of Successful **Communications** is Changing

- Transparent
- Sharing status as **honestly** as you can
- Asking for the help you **really need**

Year-End Major Donor Fundraising: Where Do You Start?

**Which major donors gave
last year,
but have not ⁸given this year?
*These are your best prospects
for year-end gifts.***

Year-End Major Donor Fundraising – Which is Best?

Transactional

Fundraising

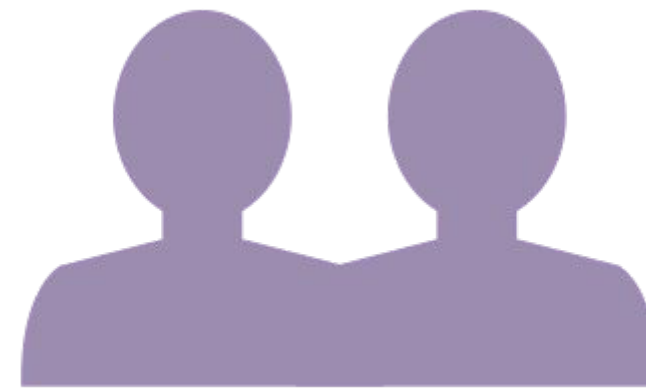
(the money?)



Relational

Fundraising

(the relationship?)



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Suspects vs Prospects?

A **suspect** is someone who...



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Has financial **capacity**



May be interested in your cause



You need to find out how interested they are – or are not

What is a Qualified Prospect?

A **qualified prospect** is someone who...



Has **capacity**



Is **interested** in your cause




Can be **cultivated** for a gift

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How to Have **Direct** Conversations with Donors

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**It's all about what
your donor thinks...
and feels...and wants
to accomplish.**

What Makes A Conversation Meaningful and Engaging?

It is focused on the donor.

Their...

- Interests
- Concerns
- Priorities

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Direct Donor Conversations



Watch and listen
for donor cues



Always keep your
focus



Donors Expect To Do the Talking

Watch their cues!

Donor:



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You:



***“You have to listen to their story,
go with the flow – and *don’t be shy to
propose something* – it opens new
doors and opportunities.”***

Patrick Berard, CEO

Hema Quebec Foundation

Major Gifts Intensive



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**POWER
DISCOVERY
QUESTIONS**
that lead to an
easy, organic Gift
Conversation.

Meet your
year-end goal!



POWER DISCOVERY QUESTIONS HANDOUT

Scan Now

10 POWER QUESTIONS
THAT LEAD TO A
CONVERSATIONAL ASK



Direct Question Examples:

- Let me be sure I understand, would you repeat what you just said?
- May I ask another question regarding.....
- Last time we spoke, you mentioned interest in... May we explore that?

**Never Make
Assumptions**





1. The DONOR STORY:

“May I ask, how did you come to be a donor to our organization?”



**Your Donors Have a Reason
for Choosing You!**



“I’d love to know
your **story.**”

“What **inspired** your
gift?”

**I love your
organization
because of my
mother...**



The Donor Story –
helps you discover her
passions, interests and
personal values!

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Listening, engaging and
finding out the donor's
story -

The key to their gift!

“I asked my donor
how he came to be
so generous, and I
walked out with a
\$5k gift!”

Diane Fuller

The Fuller Center for
Housing, Inc.

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2. What area of our work most resonates with

you?
Or,
what has been the most
meaningful aspect of your
involvement with us?



**Exercise: What are
your top 10 donors
most passionate
about?**




3. Could you see yourself becoming more involved with our organization?

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4. Ask for Advice and What They Think



Can I pick
your brain?



What are your
impressions?



I'd love
your opinion.

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If you want money, ask for advice.
If you want advice, ask for money.

We asked our top donor:

“We’d like your input on our business plan.” We walked out with a \$1.5 million challenge gift!

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Indraloka
ANIMAL SANCTUARY

~ Major Gifts Intensive participant





5. Would you like to know more about how you can help?

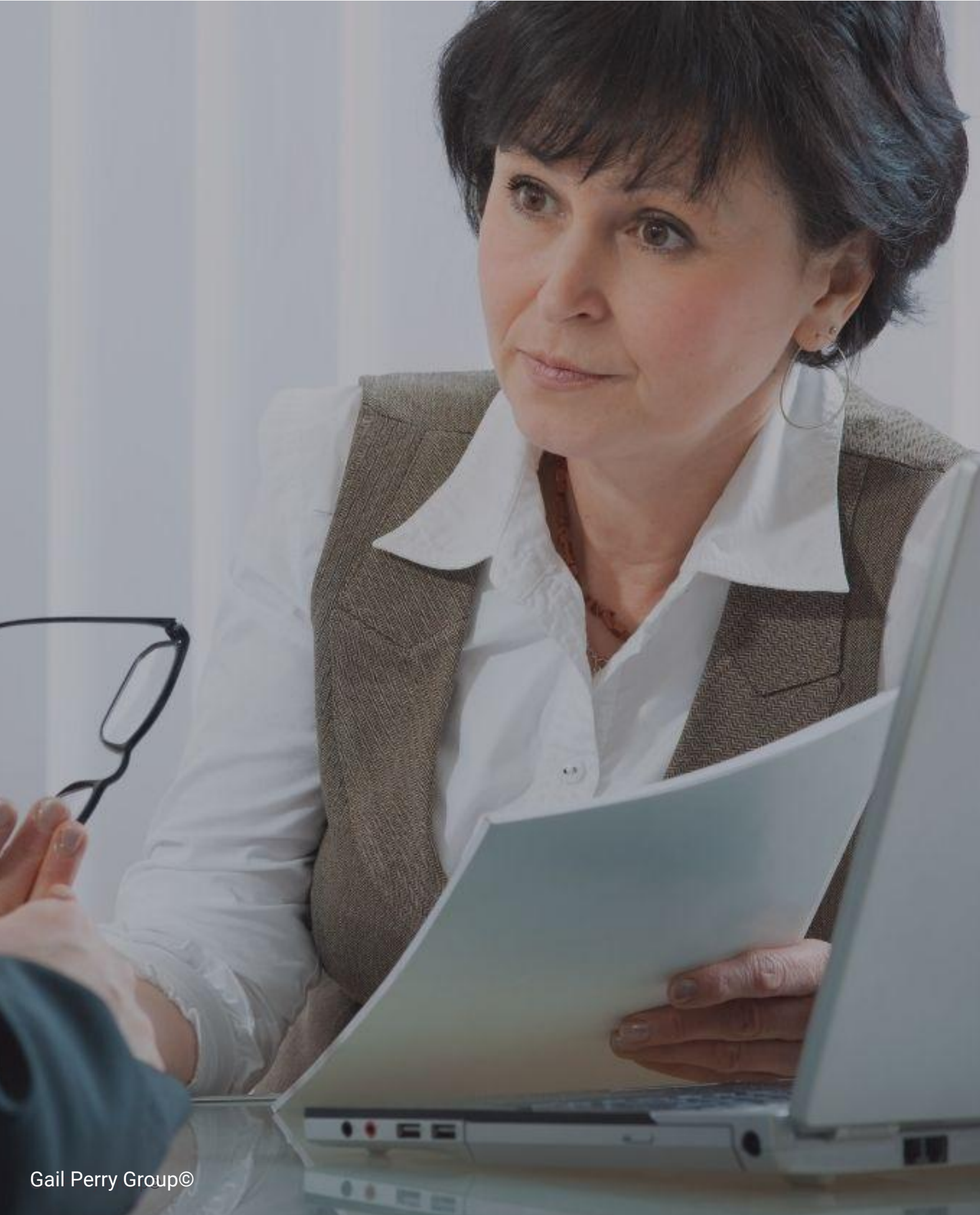
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Use Permission!

Moving Seamlessly into a Gift Conversation

- Would you share what **part of our work resonates** most with you/ your family?
- May I hear more about **your interest in...**
- Could you **see yourself becoming more involved** with our organization?
- Would you like to know more **about how you could impact** your favorite area of our work?
- If you made a gift, **what might you like to accomplish?**





6. “Is this a good time to discuss your support of our project?”

“If you ever made a gift, what would you like to accomplish?”

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1. Donor Story: “How did you come to be a donor?”
2. What resonates with you the most?
3. “Could you see yourself becoming more involved?”
4. Ask for advice and input.
5. “Would you like to know more about how you can help?”
6. “Would this be a good time to discuss your support?”

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And the donor said:

***"You have made me feel heard. I didn't feel
that way before.
I want to donate \$100k in support of your new
leadership."***



“Gail, I was always focused on the **relationship building**, the **listening**, the **gratitude**, asking for her **advice** and letting her know the amazing **difference** her previous gift had made. And it really paid off!”

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Odessa Dwarika, M.A.

Executive Director,
Jhamtse International
Major Gifts Intensive

POWER DISCOVERY QUESTIONS HANDOUT

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10 POWER QUESTIONS
THAT LEAD TO A
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Your Takeaways!

- The Post-Pandemic Landscape
- Where to begin your year-end work?
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 - Ask for advice
 - Would you like to know how you can help?
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Capital Campaigns, Fundraising Strategy, Major Gift Coaching Intensive for 2025

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