

Advice from Our Consultant about How to Make a Personal Ask

Formalizing the Personal Ask Process

- The hardest step is to get the face-to-face appointment
- Who is going to make the initial call?
- Need to script how you are going to approach the phone call because most people will just say you don't need to come talk to them in person.
- Sometimes it is best to have a person who is not going to go on the "ask" make the call.
- Usually (9 out of 10) the one who calls is the one that is going to make the ask, but not always. Sometimes you need someone to make the introduction.
"I have a person whom I work with that I would like to meet with you for 20 to 30 minutes."
"It would be a big favor to me if you would give _____ a half hour of your time. There is no obligation to do anything."
- Good time of day to make the call?
- Am I well scripted?
- Where do I want to meet? *Usually at their home.*
- Where you are going to meet is also important; some people don't want to meet in their personal homes so you need to have a couple of times and places where you have thought about meeting.
- Need to think if the spouse should also be present.
- Who do I want to meet – often both spouses – or which one? *Usually both*
- What venue do I want to seek – what are the fallback plans?
- What time on the calendar and the clock?
- Who is going to make "the ask"?
- Usually two people go on the ask. *One person tells the story, the other one watches and thinks. There is a psychology behind two people making the ask: This work is worth making the ask for two people.*
- Who will make the ask? *Usually the person who is telling the story. Follow common sense and what feels comfortable to those present.*
- Be scripted to make "the ask" on the phone if that is the only way to get the gift.
- If the in-person ask is not going to happen: You need to be prepared to make the ask over the telephone.
I wish I could, but this is something I can't do over the telephone. If you could just spare me 15 minutes.
- ***THE ASK IS ABOUT THE STORY.***
- Be prepared if they say we are not making any gifts right now – if you are not prepared that will stop you in your tracks – have something else to say – "All right Mary, it is agreed that you are not going to make a gift, but I want to tell you about something important to me. I will not ask for a gift at the end."
- Someone has to really not want to talk to you to decline even that approach.
- Tell the story and stare at people. If they hear a story they like –they create the ask themselves.
- 9 out of 10 times – once you are in the room it is okay
- ***How do you "raise their sights?"***
~ "We hope you would consider a pledge over 3 or 4 years of \$XXXX.
~ Define the purpose of the gift.
~ Give them a list of things that are needed and let them pick a "project"
• If you accidentally reach too high, they will let you know right away.
• They don't get mad, usually they are flattered by an ask that is too much
• Sometimes the potential donor can't really listen to you because they are calculating in their head what they are going to ask of you.