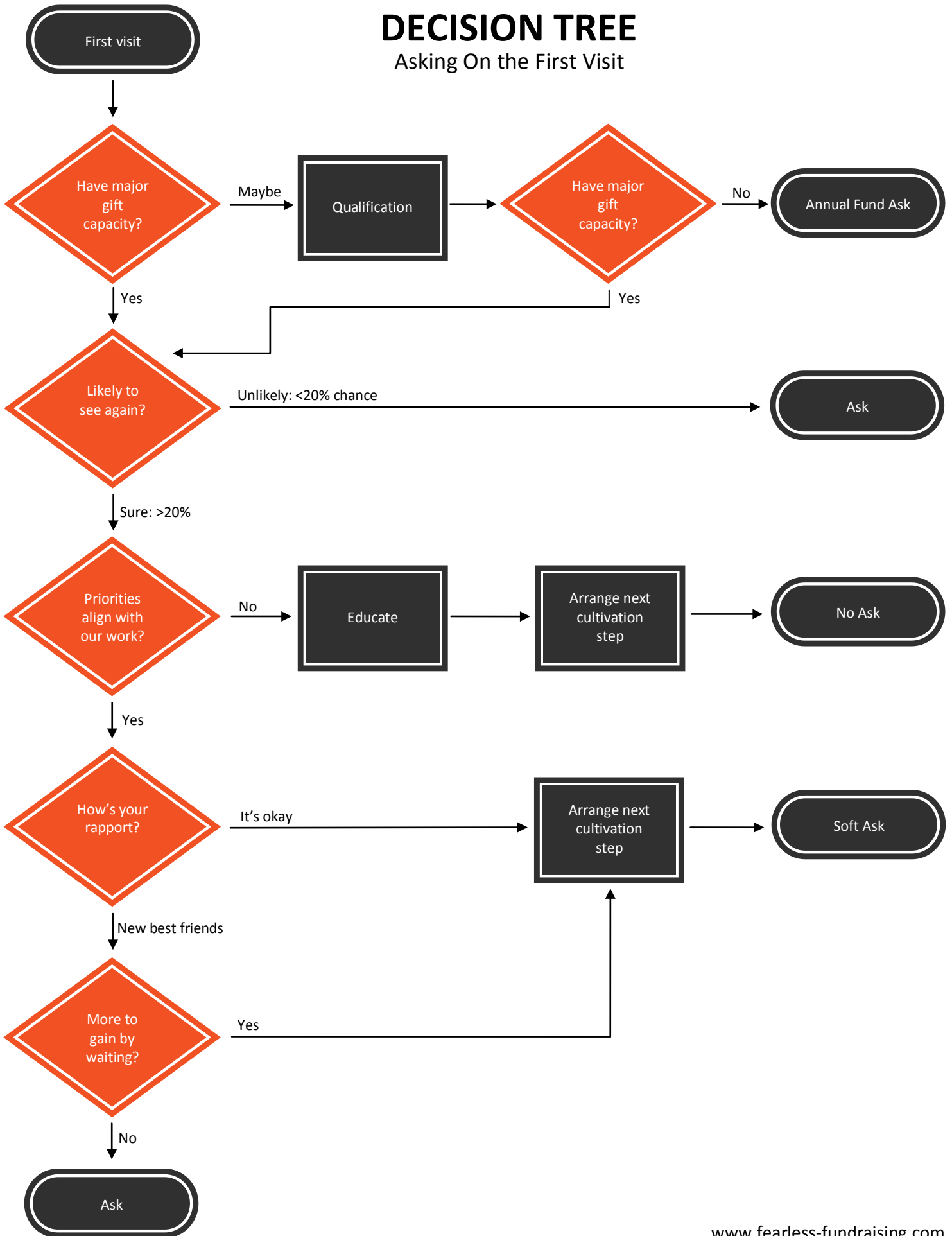


DECISION TREE

Asking On the First Visit



Notes

Decision Points



"You only get one shot, do not miss your chance to blow. This opportunity comes once in a lifetime yo." File this one under Fundraising Lessons from Eminem. Maybe its geography; maybe it's your prospect's incredibly busy schedule. Sometimes we just know we'll never see the prospect again unless we can make something special happen. If that's the case, be ready to ask. You've got nothing to lose.

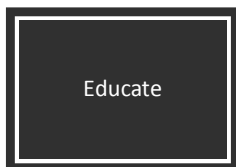


This question assumes two things: 1) that your prospect is philanthropic, and 2) that she has clear giving priorities. If neither is true, clearly her giving priorities don't align with your work – she doesn't have any! Follow the *No* path on the chart.



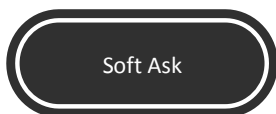
Things are going well. The stars are aligning. It's no longer a question of *if* your prospect will make a gift, but *when*. And waiting might be the right move. Instead of asking now, could you inspire a larger gift if you cultivate him further over the next 6-12 months? If your prospect is completely on board with your cause, wants to get involved, but you haven't yet identified that perfect project for him, the answer is probably "Yes!"

Action Items

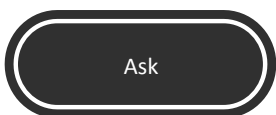


This too is part of our jobs. "Educate" appears on the chart where your prospect either isn't philanthropic or doesn't know much about your organization. In either case, it will take some level of education before she's ready to give. And it probably goes without saying that this needs happen under the radar! How do you feel when someone tries to "educate" you? Highlight the impact of charitable giving at your organization if your prospect is wealthy but not philanthropic. Provide a tour or meeting with key program staff if she's philanthropic but not yet ready to support your cause.

Outcomes



This is basically asking to ask in the future. Sometimes your prospect won't be ready for an ask of a specific amount for a specific purpose. But, he's shown interest, and your organization's work seems important to him. You want to know if he can picture himself giving to you in the future. For example: *"Bob, I know we're not there yet, but I'm hopeful that, should you continue to learn about our work and see value in it, you'd be willing to contribute to what we're doing down the road."*



Go for it! All signs say "move forward." Either that or you have nothing to lose. Whatever qualifies as a major gift to your organization, ask for that amount (or more) for a specific purpose to achieve a specific impact.