

Topic Blocks for Development Professionals

Applying Donor-Centered Process Concepts in Development

- Donor Commitment Continuum, which outlines the progression of donor commitment through six key phases.
- Process for Facilitating Donor Development, which identifies seven repeatable steps a development professional must take with the donor and appropriate organizational representatives to reach a mutual agreement on a major commitment to advance the organization's work.
- Donor Development Chart, which describes the six phases of donor commitment from the donor perspective and identifies the questions to which donors must get "yes" answers in order to advance from one phase of commitment to the next.
- Priority Grid, which helps development professionals prioritize donors within their portfolios based on financial capacity/capability and commitment to the priorities and projects of the organization.

Securing Appointments with Donors and Potential Donors

- Reasons donors/potential donors might want to meet with a development professional and how to leverage them
- Different methods for getting appointments, including:
 - Phone calls
 - Email
 - Letters
 - Referrals/Introductions
 - Events
- Effective phone calls to get appointments
 - Outline of an effective call (with sample scripting)
 - Tips to increase success
 - Pitfalls to avoid
 - Common donor questions and objections and how to address them
- Effective written communications
 - Outline of an effective email/letter
 - Tips to increase success
 - Pitfalls to avoid
- Other important methods, including
 - Turning gatekeepers into allies
 - Managing referrals
 - Leveraging events

Adapting to Different Donor Personalities

- Overview of four cornerstone personality traits, including:
 - Characteristics
 - Common descriptors
 - Likes and dislikes
 - What information each trait needs to make decisions
 - Ways to adapt to each trait
- Tools for identifying and adapting to different personality profiles, including:
 - Trait Intensity Chart to identify personality profiles without the computer-based test
 - Matrix of how each of the traits tends to perceive other traits
 - Chart outlining what each trait finds motivating and de-motivating based on high and low trait intensity
 - Practice identifying personality profiles from video clips
 - Application of the personality profile to real donors

Preparing for Productive Meetings with Donors and Potential Donors

- Review reasons donors/potential donors might want to meet with a development professional and how to leverage them
- Overview of five-phase meeting approach
 - Build Strategic Rapport
 - Share Organizational Update
 - Get the Donor's Story on the Table
 - Explore Next Steps
 - Ask for Action
- Primary and secondary meeting objectives, based on:
 - Next big goal for this donor/potential donor
 - Location on the Donor Commitment Continuum
 - Step in the Process for Facilitating Donor Development
- Using Nine Navigation Points to determine:
 - What you know
 - What you need to find out before the meeting
 - What you need to find out during the meeting
- How to prepare a strategic Organizational Update

Conducting Effective Meetings with Donors and Potential Donors

- Review of/or five-phase meeting approach
 - Build Strategic Rapport
 - Share Organizational Update
 - Get the Donor's Story on the Table
 - Explore Next Steps
 - Ask for Action
- How to build strategic rapport
- How to use high-value questions to advance the conversation
- How to share a strategic and conversational Organizational Update
- How to determine potential next steps
- What it means to "ask for action"
- What to do after the meeting to continue the momentum

Applying the Process for Locating Philanthropic Passion™

- Difference between obvious interests and deeply held passions
- Introduction to seven-step Process for Locating Philanthropic Passion(s)™
- Exploration of each of the seven steps, including key phrases that encourage donors to reveal more
- Role-playing exercise to practice the process

Engaging Donors and Potential Donors to Build Commitment

- Engagement Checklist, which outlines seven potential purposes for engaging donors and potential donors
- Ways to engage donors (25 ideas provided, but participants are encouraged to add to the list based on their unique organization)
- Five questions to increase the impact of engagement efforts
- Techniques for raising donor sights
- Application of concepts to build a 6- to 9-month engagement plan for a real donor

Securing Financial Commitment

- Exploration of donor perspectives by analyzing 2-3 video clips representing different types of “asks”
- The journey to financial commitment—no short-cuts
- Factors you need to know or have in place to ensure financial commitment
- Using Nine Navigation Points to assess donor readiness
- Direct and indirect approaches to asking for a financial commitment
- Methods for asking for financial commitment, including:
 - Spontaneous ask
 - Document-driven ask
 - Person-driven ask
- How you might use a combination of approaches/methods on the journey to financial commitment
- Determining the right amount of the financial commitment
- Overview of five-phase meeting commitment meeting
- Outline for asking for financial commitment
- Practice asking for financial commitment
- AC/AC process for managing donor objections and concerns (Acknowledge, Clarify, Answer, Confirm)

Creating Meaningful Return on Philanthropic Investment (ROPI)

- Going beyond “Thank You”
- Three components of ROPI
- Creating “Personal Impact Experiences” (PIE)
- Tips for managing expectations
- Questions donors ask themselves related to respect
- Seven simple ways to show respect
- Touch Points that show you care

Partnering with Academic Leaders

- Optimizing internal partnerships by matching people with purpose
- When NOT to get others involved
- Top 5 concerns of academic leaders
- Roles of academic leaders
- Partnering with academic leaders in donor meetings
- Coaching academic leaders on their Opportunity Stories

Building Donor Development Strategy

- Defining goals, strategies, and tactics
- Review/Overview of Nine Navigation Points for accelerating donor commitment, including:
 1. Links to the organization
 2. Phase on the Donor Commitment Continuum
 3. Financial Capacity/Capability
 4. Life Stage
 5. Tipping Points
 6. Personality Profile
 7. Family/Influencer Dynamics
 8. Philanthropic Passions/Potential Matches
 9. Gift Evaluation Concerns and Questions
- Case study to drive understanding and application (optional)
- Application to real-world donors

Building Your Development Volunteer Program

- Changes in how volunteers perceive their roles and how to engage them in light of these trends
- Five keys to building a strong development volunteer program, including:
 - Recruiting the best volunteers
 - Establishing clear roles and expectations
 - Exploring roles and responsibilities
 - Providing training, tools, and coaching
 - Connecting volunteers with opportunities tailored to their skills
- Methods for ensuring volunteers feel appreciated and valued