

Questions and Potential Responses by Personality Trait

How would those who know you best describe you?	
DOMINANCE	“A leader” or “bossy” or other terms that show they like to take charge
EXTROVERSION	“A true friend” or “chatty” or other terms that show they love people
PACE/PATIENCE	“A peacemaker” or “easy-going” or other terms that show they enjoy creating a sense of harmony
CONFORMITY	“A perfectionist” or “detail-oriented” or other terms that show they appreciate the little things that go into a job well done

Pay attention to whom they choose as the person who knows them best. This person might be an important influencer and someone worth involving in philanthropic decisions or events.

What kind of sports or games do you like to play?	
DOMINANCE	Relishes games that have a clear winner
EXTROVERSION	Likes games that requires teamwork and good communication
PACE/PATIENCE	Enjoys games that put the emphasis on working together rather than winning and enjoys multi-layered problem-solving games that use the process of elimination
CONFORMITY	Appreciates games that require a high level of skill and knowledge of the rules to solve or win

Pay attention to the types of sports or games they enjoy because it could be a clue to their financial capacity. If someone enjoys yachting, equestrian events, or other high-dollar activities, they probably have high capacity.

Tell me about your latest travel experience.	
DOMINANCE	Gives a short, direct answer
EXTROVERSION	Shares who went with them and/or who they met
PACE/PATIENCE	Describes the overall experience—whether it was relaxing or stressful
CONFORMITY	Details their well-planned itinerary

Pay attention to where they went—it can be an indicator of their financial capacity.

Questions and Potential Responses by Personality Trait (cont.)

How do you typically organize your day?	
DOMINANCE	Likes to hit the ground running with clear focus and a determination to begin new tasks/achieve specific goals
EXTROVERSION	Likes to involve people in organizing their day, prioritizing meetings, and other important conversations
PACE/PATIENCE	Enjoys spending time each morning (or the evening before) reflecting on critical action items and putting tasks that impact others at the top of the list
CONFORMITY	Already has an established plan for each day, and possibly for the week, month, or year

Pay attention to their body language and expressions (or lack thereof) for clues to their personality type. High Dominance will be direct, High Extroversion be more animated, High Pace/Patience might reflect before replying, and High Conformity will be less animated.

From your perspective, what makes philanthropy appealing?	
DOMINANCE	Gives them the power to make a difference—they are doing something good or taking action Will likely give a big-picture response
EXTROVERSION	Gives them a way to impact the lives of people Will appreciate that philanthropy is a team effort
PACE/PATIENCE	Appreciates philanthropy for its ability to even the playing field for people Will focus on how they can contribute to the greater good and/or create harmony/balance/peace
CONFORMITY	Gives them the ability to improve or contribute to lives by changing or leveraging systems Response will be possibly less big-picture and more detailed

Pay attention to any stories they may tell in response—these could reveal links to the organization or provide clues to their philanthropic passion(s).

Use these and other high-value questions you come up with on your own to determine the highest personality trait of potential donors and those with whom you work. If you are struggling to break through or to collaborate more effectively, take some time to think about the Platinum Rule and how you can best communicate with others according to their preferences. Doing so will elevate your conversations—and your work—to higher levels.