

Making an Artful Ask Exercise©

Marcy Heim, CFRE, PLCC, The Artful Asker

Focus your attention on your prospective giver as you prepare for a successful, respectful ask. As we create the genuine relationships that lead to major gift success, use my checklist to create a joyful giver who is engaged and ready to hear an artful ask. Select an individual/couple you are currently working with who can make a "major gift" for your organization or institution. Complete the areas below...if you don't have knowledge of an area now, just leave it blank or add your hunch. THEN.....**Write out an artful ask using my 3-sentence ask on the bottom of page 2 with what you know now.**

Name of Prospective Giver(s): _____

DO WE KNOW..... (discover these answers in your pre-ask visits/touches)

- if their values align and fit with our institution/organization?
- if they understand our mission and believe in the work we do?
- if they have a clear understanding of the value of our institution or organization to those we serve, the community, a larger good? Examples?
- how to best interact with them...email, letter, phone, in person? This is not just for the "ask" call but along the way...what works best for what sort of communication?
- what other organizations they have supported? What did they like about that involvement?
- if they are positive about our leadership, both staff and volunteer? If there are any people that are particularly close? should be avoided?
- if they understand what an endowment is? Have they supported one in the past for us or someone else? Do they prefer to see their gifts used to meet immediate needs?
- who else they know that is closely connected with us - Board members, other donors, faculty, volunteers, doctors, board members, others?
- how/when they make their charitable giving decisions – couple, with kids, certain time of year?
- if they like to attend our events? Which ones? Does the time of day/year matter for them?
- how to they like to be recognized? By whom? Stuff? When? Where?

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- if they serve with us or have in the past? How? Overall committee? Volunteer? Board membership? Focus group? Informal advice?
- what their past giving history is with us? What is their current level of giving? For how long? Consecutive? Remember.....a major gift is 10-20 times the annual gift. What is this amount?
- if there are any special circumstances or unique opportunities? A matching gift they can help with? Personal or mission-based? Gift in honor/memory of? Milestones in their life?
- Finally.....Have we talked with them about the specific projects/programs/overall area of interest they have with us? Have we explored several different options/projects/giving clubs and talked about giving levels associated with the projects/impact that coincide with a major gift for their level? List some examples. Be sure to attach dollars to impact. Generally you want 2-3 levels. Have we specifically mentioned a giving level we are looking for and listened to their reaction? Have we done this several times?

Write (and speak) the ask. USE THESE THREE SENTENCES, none longer than 17 words. PRACTICE

- **Bestow sincere honor/praise of their role with your organization**
- **special connection to this ask/pride with organization**
- **be considerate; ask for consideration**
- **state specific amount**
- **state specific purpose**
- **Be quiet**

_____,
(name of prospective giver)

1. You have (compliment on connection, service, past giving, status in the community)

2. You understand (special connection to/appreciation of the impact of the gift you are asking for)

3. Would you consider a gift of \$_____ for/to (special use)?

then be quiet ... Marcy

Thanks for participating in my 3-sentence ask exercise. You can subscribe to my monthly ezine or download a complimentary chapter of my book at www.marcyheim.com. Thank you for being part of this honorable and noble profession and composing a good world! Marcy