

**More**

# Making all the right moves?

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# Halpin Partnership

Making all the right moves?

[www.halpinpartnership.com](http://www.halpinpartnership.com)

# What will we cover?

- Are you getting the basics right?
- Why do people give?
- What is the donor's motivation? Do you know them well enough?
- How do you move them from the first gift to the transformational gift?
- What can you control?
- Time to share... examples!

# What won't we cover?

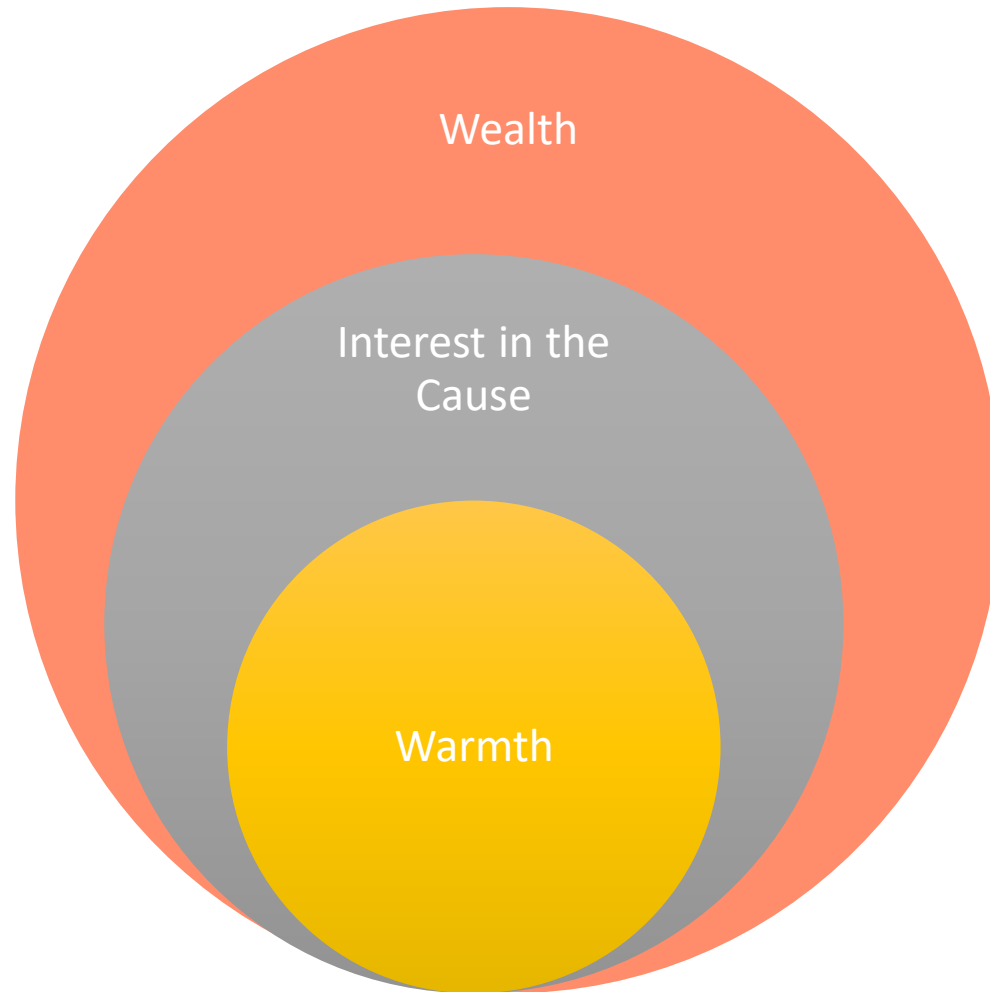
- Wealth screening
- The ask (or a magic phrase that makes everyone give...)
- GDPR
- This is about making the right journey towards a major gift

# The Basics

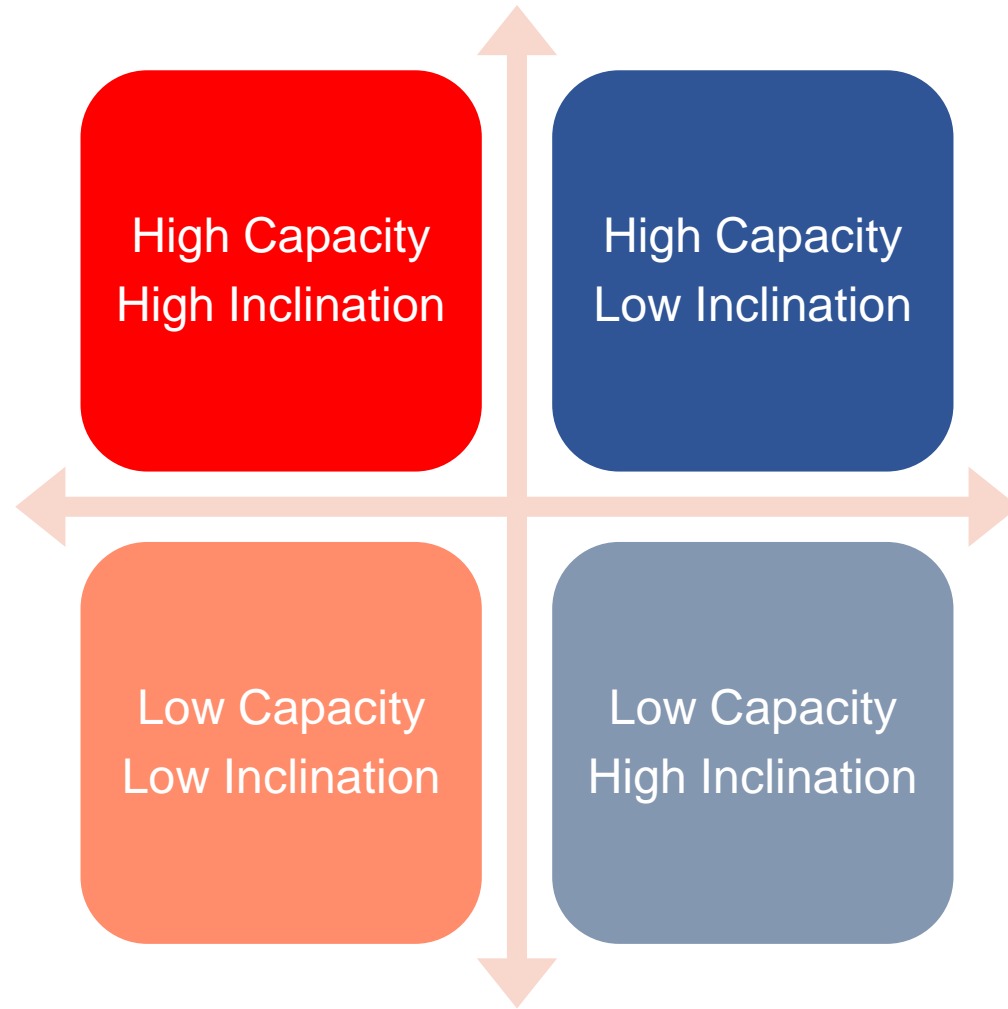
# Getting the basics right

- Are you concentrating on the right people?
- Don't get sidetracked
- Create a pool
- Targets

# The Right People?



# Don't get sidetracked





# Create a Good Pool

- 150 prospects (full time fundraiser)
- Management takes time...allow for it
- 50 active relationships
- Know your Top 10
- Does your pool equate to your targets?



# Targets

- Fundraising is sales, and the same ratios apply:
  - 80% of amount from 20% of prospects
  - One gift for every four solicitations
  - Do you have 4 options for a big gift?
  - It is a numbers game. More asking equals more gifts
- Be out more than you are in - 3 days on road, 2 in the office
- 150 meetings per year (10-15 per month):
  - Challenging when starting out
  - Includes second and third meetings

# Remember

48% of salespeople never follow up with a prospect  
25% of salespeople make one contact and then stop  
12% of salespeople make three contacts and stop  
10% of salespeople make more than 3 contacts

**AND**

2% of sales are made on the first contact  
3% of sales are made on the second contact  
5% of sales are made on the third contact  
10% of sales are made on the fourth contact  
80% of sales are made on the fifth to twelfth contact

**Without the long (sometimes painful) journey, you don't get to the ask!**

*Source: National Sales Executive Association*

Why do people give?

# Donor Motivations

## The Factors

- The Person who Asks
- The Cause
- The Impact
- Social Pressure/Acceptance
- Leaving a Legacy
- Guilt
- Background/Experience

## What Can You Control?

- The Asker
- The Cause

How do you find out the rest?

Moving from the first gift to the  
transformative gift

# How do you move to Transformational Gifts?

- Understand the Donor's Motivation. How well do you know them?
- Great Relationship Building
- The Asker
- The Project
- The Timing
- Asking

# Great relationship building: what does it take?

## **Authenticity**

- Be yourself, with skill.
- The friend/professional barrier.
- Always be clear on the basis, remember why you're there.

## **Understanding**

- Listen.
- What is their motivation?
- What recognition would they want?
- What stewardship can you give that no one else can?

## **Time**

- Planning - cultivation and stewardship plans, from the start.
- Know your Top Ten and spend time on them.
- Ask great questions.



What do you control?

# The Asker

## Who should ask?

- The Head?
- The lead volunteer? (e.g. Governor)
- The fundraiser?

## Pre-ask

- Have you got the project right?
- Have you got the motivation right?
- Have you got the timing right?



# Not Oliver, but Winston....

## The Asker

- Major gifts are a team sport
- Many people will be involved
- KCL – at least 7 people

## The cause

- Know the project intimately
- Know that this is what they want to do
- Know how you should present it
- For their biggest gift – their interests and yours will coincide

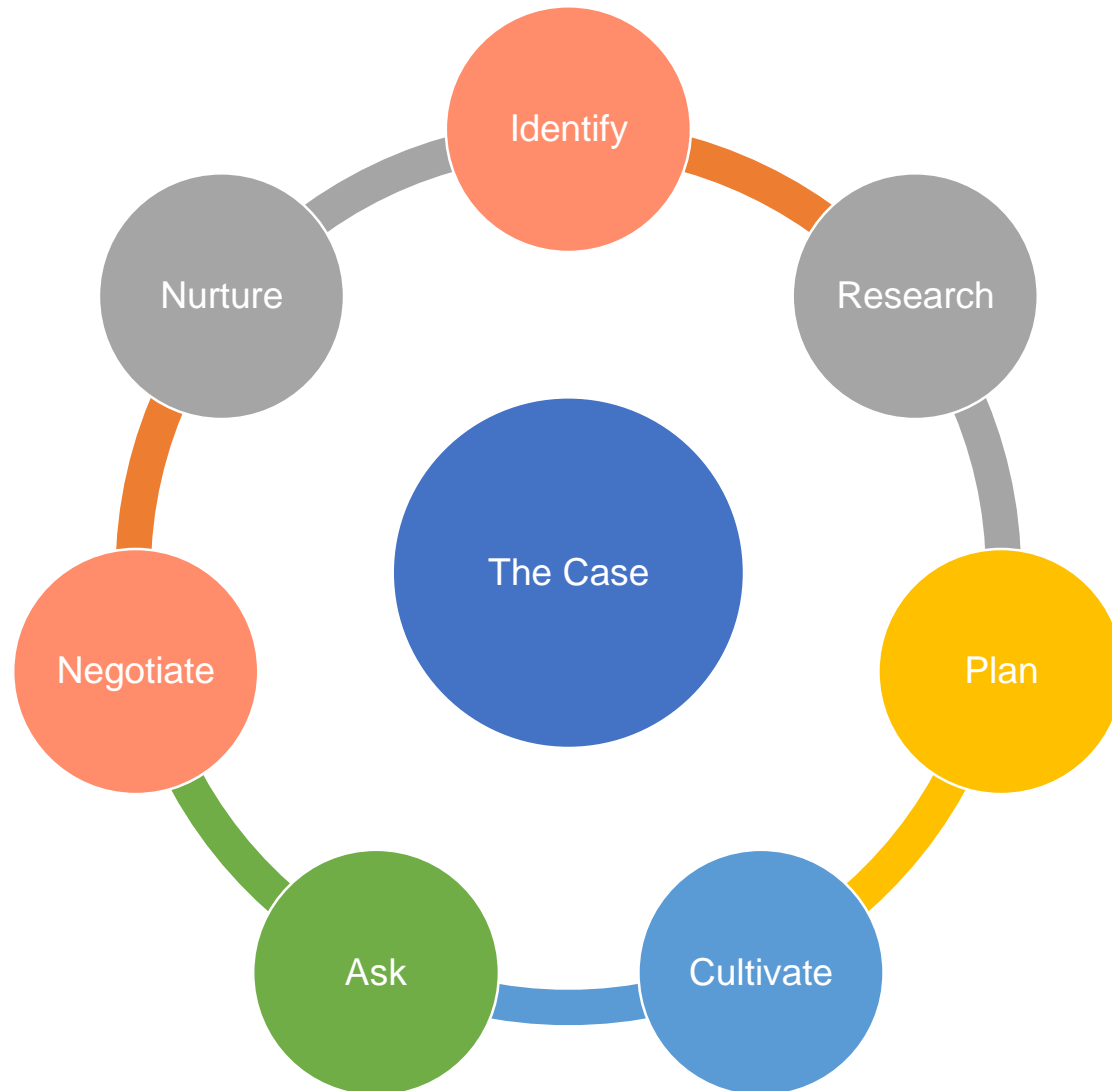


Asking

# Asking

- People give because they are asked
- Asking well (and regularly) gives you more opportunities to do your job
- Asking for transformative gifts may not be “one event” but many that come together

# Seven Steps



# Final Advice

- Keep your pipeline moving
  - Always be making new contacts
  - But make sure you concentrate on those you already know too
- The seven steps are a wheel – keep it spinning!

# Good Luck!

Be sure to follow us online for more advice and the latest sector news and insight.

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