



FUNDRAISING  
SOLUTIONS

# How to Ask

## A step-by-step primer

- ✓ **STEP 1 – Know the organization and campaign/project well.** Be a believer and be able to “sell” the mission, vision and leadership effectively.
- ✓ **STEP 2 – Select a prospect with good odds.** Considering starting with a small “win” first to build your confidence.
- ✓ **STEP 3 – Know as much as possible about the prospect.** Have they been a donor before? Do they support other similar organizations?
- ✓ **STEP 4 – Send a “pre-emptive” personal note or email to alert them of your call.** It’s always good to give someone a “heads up” that you are contacting them and it helps hold you accountable for following through!
- ✓ **STEP 5 – Call your prospect and invite them to meet.** Use the phone first, then resort to email.
- ✓ **STEP 6 – Follow up until the appointment is set.** This will be the hardest part. Stay committed and focused, it could take 5-7 attempts.
- ✓ **STEP 7 – Repeat step 6.** We’re not kidding. Don’t give up or take avoidance personally!
- ✓ **STEP 8 – Ask a staff or board member to join you.** This step will help you feel comfortable with organizational or project-based questions that may come up.
- ✓ **STEP 9 – Tell the story of why you love this organization.** Tell it from the heart. Why did you CHOOSE this organization over so many others? Make it personal, this is the most effective way to fundraise!
- ✓ **STEP 10 – Make the case for support... and answer questions.** Now is the time to review the collateral and visuals you brought with you...
- ✓ **STEP 11 – Ask the prospect to “join you” in making a gift of (INSERT \$\$\$).** We can’t tell you exactly when the opportune moment will come, but you’ll know it when you feel it. DO NOT shy away from asking for a dollar amount or giving concrete examples of what other people are investing.
- ✓ **STEP 12 – Stop talking.** Don’t fill the silence with anything or apologize for what you just did. Yes, people do this often.
- ✓ **STEP 13 – Listen to their response and respond appropriately.** If you’re meeting the prospect face-to-face, research tell us you’re already 85 percent of the way to a gift! However, if the meeting doesn’t end with a gift, look at it as an opportunity to share and educate someone who just isn’t ready – yet!
- ✓ **STEP 14 – Report back to the organization.** Let the organization and your fellow volunteers know how it went. Celebrate success and share what didn’t go well and why.
- ✓ **STEP 15 – Follow up and thank the prospect/donor.** Send a personal note in addition to making sure the organization does the same.
- ✓ **STEP 16 – Continue the stewardship.** This is your donor as well as the organization’s. Keep them up-to-date on campaign progress and, ultimately, project impact and ROI so they continue to give and increase their gifts.

## About Aly Sterling Philanthropy

Aly Sterling Philanthropy is a full-service consulting firm specializing in building sustainable solutions for nonprofits. We provide fundraising, board governance, strategic planning and executive search services to organizations of all shapes and sizes.



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CONSULTANTS IN GIVING AND RECEIVING