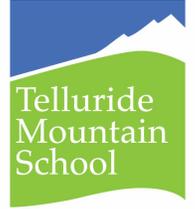




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Changing Your Mindset

The Art of Asking Strategic Questions

October 17, 2023

Mary K. Carrasco
Senior Vice President

WHY ASK QUESTIONS?

- To get to a “Yes” for the most generous gift possible
- To learn why the prospective donor would consider making a gift at this time
- To understand how the prospective donor’s desires match institutional priorities
- So that the natural outcome of an honest & and authentic relationship is the desire and willingness to make an informed gift decision
- Resulting in inspired, joyous giving
- Deepening engagement
- Life-long trusting, productive, satisfying relationship

WHY CURIOSITY IS IMPORTANT

- It makes your mind active instead of passive
- It makes your mind observant of new ideas
- It opens up new worlds and possibilities
- It brings excitement into your life

HOW TO DEVELOP CURIOSITY

- Keep an open mind
- Seek surprise
- Ask questions relentlessly
- Don't label something as boring. Be fully present.
- See learning as fun

APPEALING REASONS FOR A VISIT/TALK

- Stewardship
- Seeking Advice or Input
- Planning
- Recruiting
- Engagement invitation
- Screening
- Soliciting



WHAT DO I WANT TO KNOW MORE ABOUT?

- Gift Purpose
- Gift Amount
- Solicitation team
- Time/Timing
- What must happen first?
- Place
- Materials



GIFT PURPOSE

- Knowing the purpose will drive the amount!



GIFT PURPOSE

- Tell me about gifts that have given you the most joy?
- If you could make the very best gift you could imagine, what would it be for?
- Which of the school's priorities do you believe is most essential to achieve?



GIFT AMOUNT – TEST ASK

- Would you consider beginning a conversation about a major gift/leadership Annual Fund gift of [a specific amount]?
- I would welcome the opportunity to develop a gift proposal with you that would establish an endowed fund with a gift of [a specific amount]. May we start that conversation?
- At this point in time, we are asking those donors who can have the greatest impact with a gift of [a specific amount] to begin a gift conversation. Is this the right time to meet with the Head of School to learn more about the fundraising timetable?



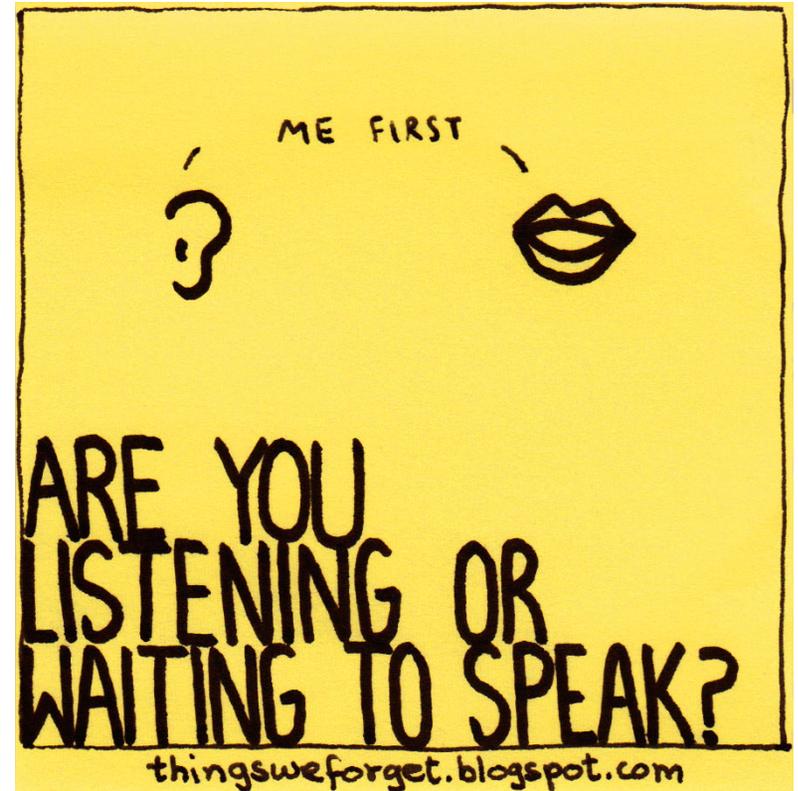
PHILANTHROPIC PROFILE©



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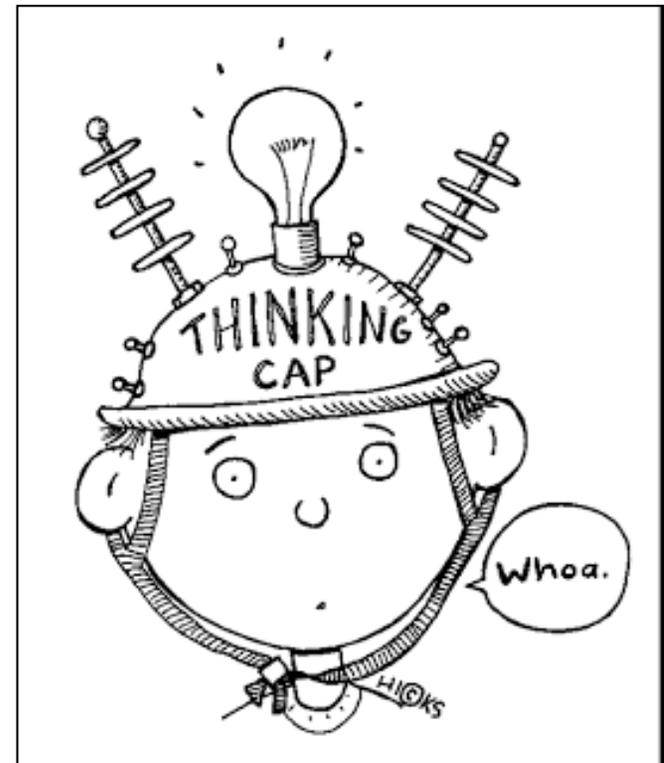
HOW LISTENING IS ESSENTIAL TO CURIOSITY!

- Listen carefully
- Ask a follow-up question
- Go deeper until you understand INTENT



MORE INFO ON STRATEGIC QUESTIONS

- Start broad
- It's a conversation
- Create movement
- Create option
- Dig deeper
- Empower



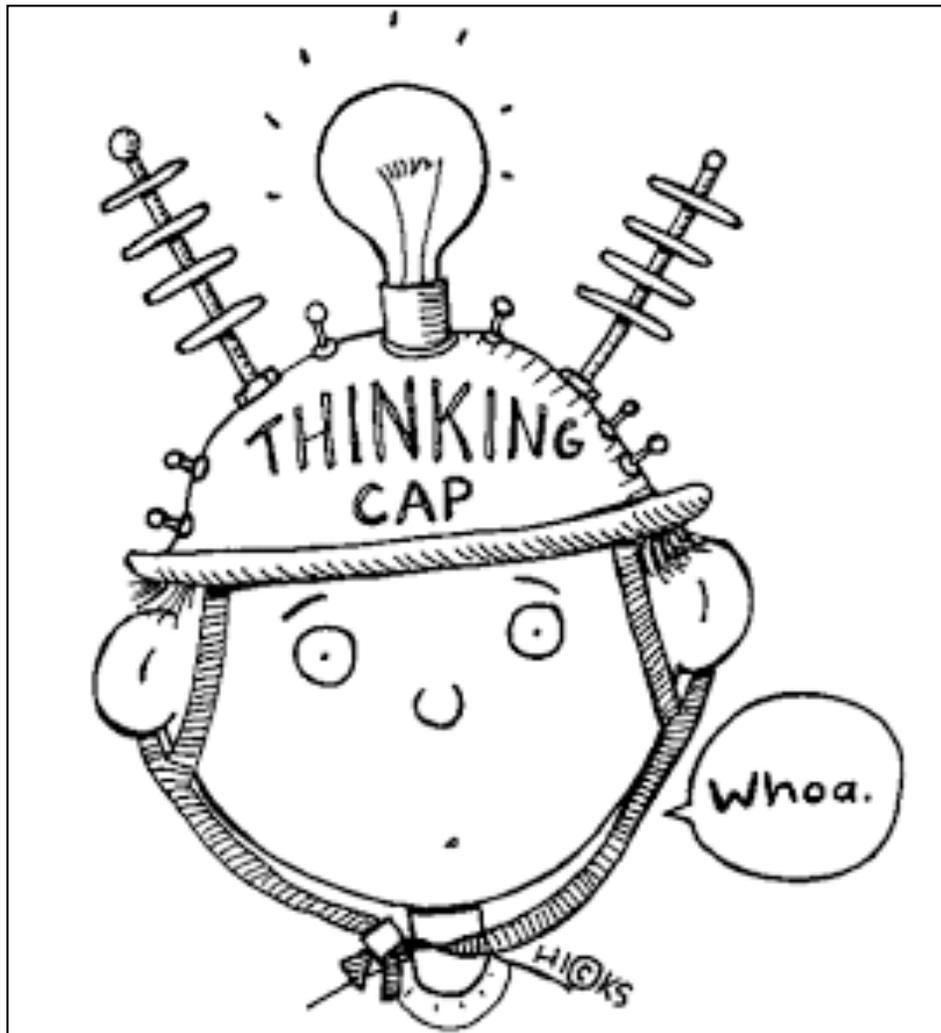
**END EVERY
CONTACT
WITH A
YES TO NEXT
STEP**



PRACTICE STRATEGIC QUESTIONS

- Ask: “Is there a story you can share with me about a gift you have made that gave you a great feeling?”
- Then have a conversation. The questioner should ask strategic questions to learn more and keep the conversation moving forward.
- The responder should talk about a personal example. Don’t make up a story! Use your real life for answers to the questions.
- Then, change roles.

THE ART OF ASKING STRATEGIC QUESTIONS



THE ART OF ASKING STRATEGIC QUESTIONS

