



Orchestrating Relationships with Major Donors



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What we'll cover

Real-life experiences that illustrate key principles for major gift success

Discovery of **unconscious** competencies and examples of how we use them intentionally

Introduction to powerful **communication** skills that will work with all behavior styles

Strategies to identify, **engage and manage** key donor relationships



Key principles

Extraordinary relationship and rapport skills are essential for fund raising success.

These are teachable.

Research pays off.

The most important major gift marketing strategy is building *relationship networks*.

Getting to yes may be a bumpy ride, so hang on.

Cultivating people, not entities-- yields bigger results.



Make friends BEFORE you need them.

Truism 1

Congressman Tip O'Neal



Be aware of your biases

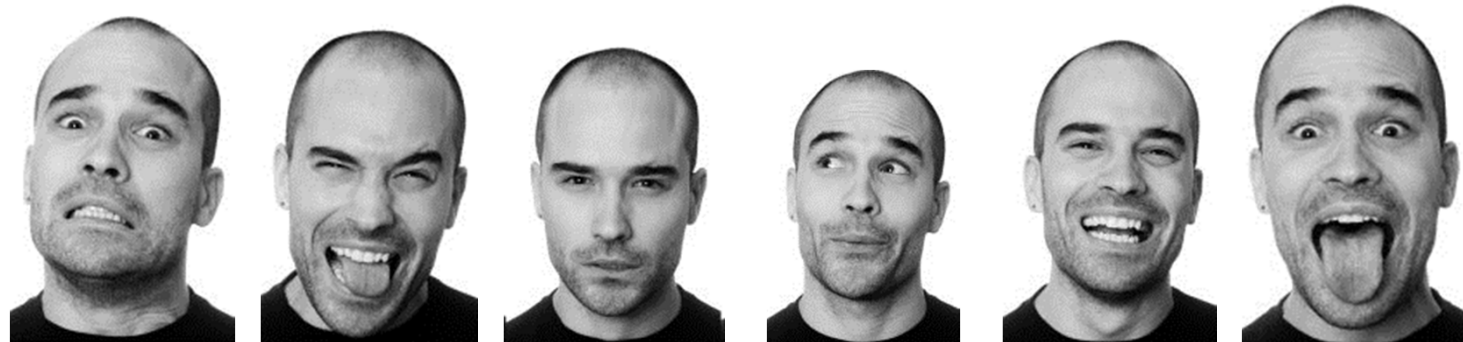


Examine your relationship with money to establish deep confidence and comfort with asking.

Feel at ease asking for any amount.

Prepare for and expect *any response* to an ask.

Consider the meaning of money and how money “works”?



Terrified

1

Disgusted

2

Stubborn

3

Ambivalent

4

Happy

5

Eager

6

Director Dial

- A. Asking a friend for a contribution.
- B. Asking a relative stranger for a contribution.
- C. Asking a perfect stranger for a contribution.

ADD IT UP

- E. Dining with a friend.
- F. Dining with a potentially new friend.
- G. Talking with a friend to something that is important to you.

ADD IT UP

- H. You being asked for a contribution

ADD IT UP



Know your own mission



What

- What is the meaning of your life?
- What brings you energy?
- What brings out your passion?

How

- How are you successful?
- What key capabilities do you utilize?

Outcomes

- What are your aspirations for others?
- What is the impact you seek?
- What will you achieve?

Larry's mission



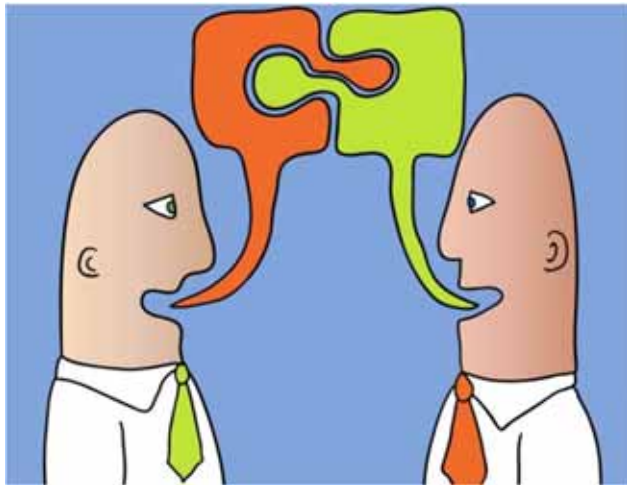
To bring focus, accountability, creativity, passion and success to:

- Your philanthropy enterprise
- Raising the family
- Cooking dinner

Take 1 minute to start drafting your personal mission statement:

Exercise

- Just think of words, images
- Vision where you want to be in 5 years, in 25 years
- The high points of your obituary
- Write down values you hold dear
- Mission
Who
How
Outcome



Organizational mission



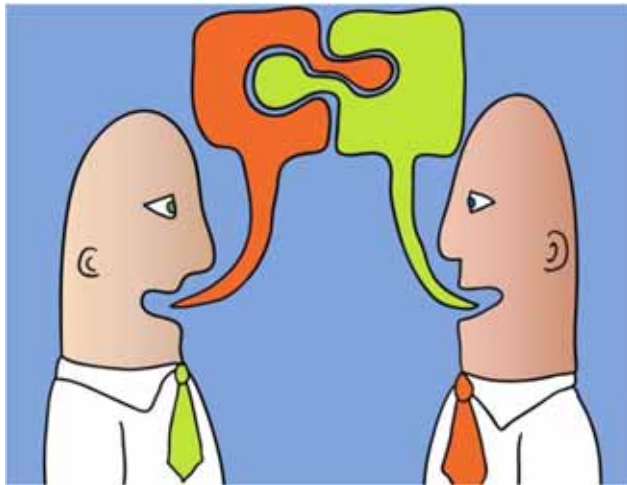
What is your organization's mission?

Is it aligned with your personal mission?

Can the miss alignment be overcome?

- Pair up with someone you don't know
- Discuss for 3 minutes (each) on how your personal mission is or is not aligned with your organizational mission
- Observe each other as you interact

Exercise





**Building
Rapport
With Donors**

**Get
personal**

High results



High "touch"

What is rapport



Rapport is largely the result of *unconscious* behaviors that are essential for relationship success.

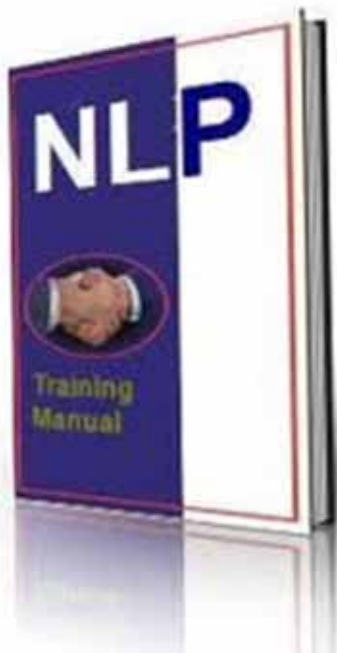
It is the mutual feeling of being in "*sync*," or being on the same "*wavelength*" with others.

Rapport is the shared feeling of being understood.

Rapport skills can be learned and consciously applied to ensure relationship success.

You can establish basic rapport intentionally with matching and mirroring

Neuro- Linguistic Programming



Neuro-Linguistic Programming embraces three key concepts.

1. We experience our reality through our neurological system... our **five senses**.
2. We give and project meaning through **language and non-verbal communication**.
3. Each person expresses his or her “**program**” through language that we can learn from to build rapport, relationships, trust, and influence.

Being in sync



People feel understood and safe with people who are **like themselves**.

Match the donor's volume, tone, and rate of speech to increase trust and to foster the donor's willingness to communicate.

Mirror the donor's body language with subtlety to automatically increase rapport.

Like partners in a **dance**, rapport allows us to get into pace with each other.

When you're **in pace** with your dancing partner, you can easily lead to the next step.

Tune in



Listen...what words to they use:

I *see* what you mean

I *feel* differently than my husband about that

I *think* your organization does good work

Pace of speaking:

Rapid

Slow

Staccato

Physical:

Sits close

Touches to make a point

Create Intentional Rapport



Mirror

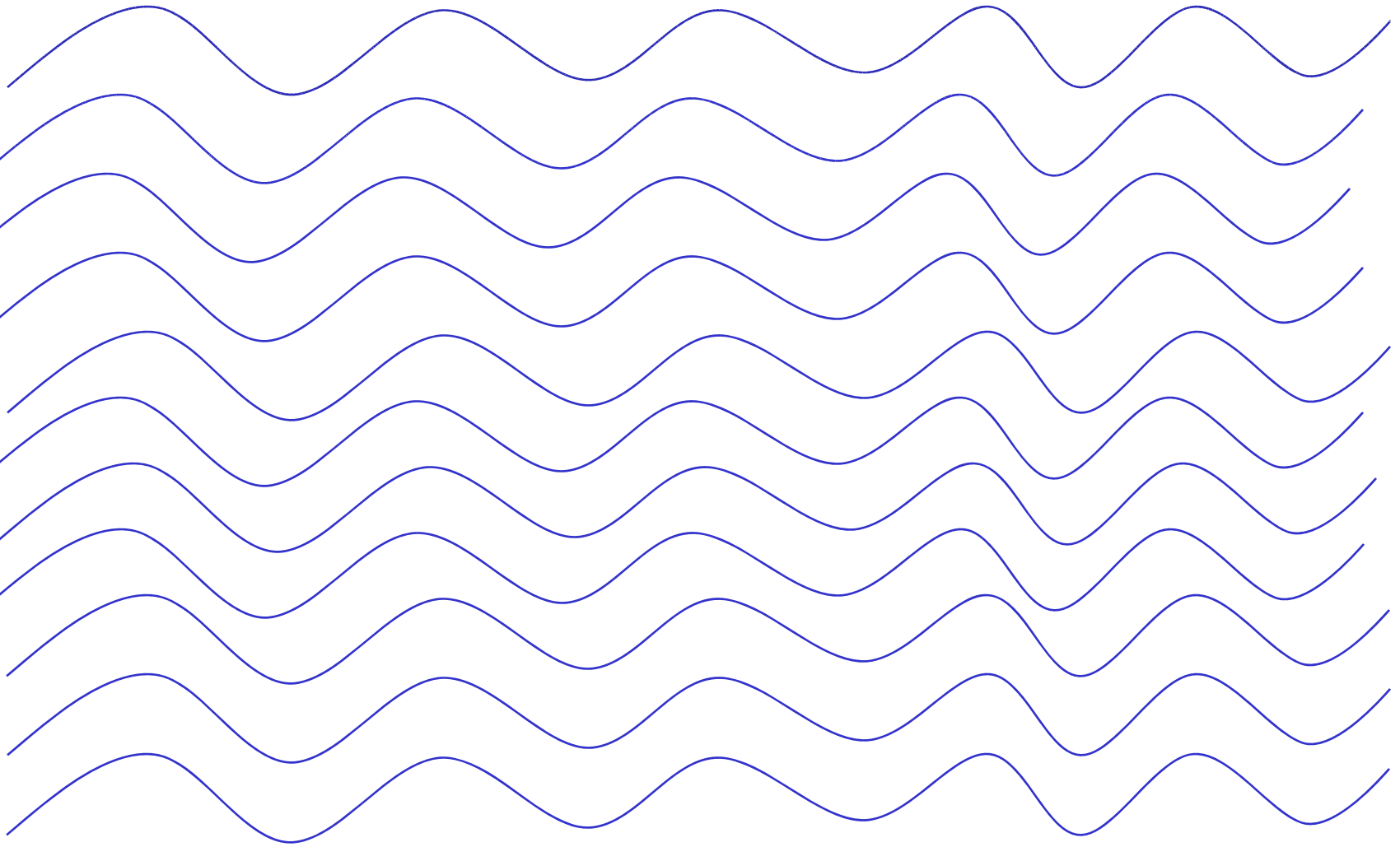


Match

From Rapport To Relationship

R I D E T H E W A V E

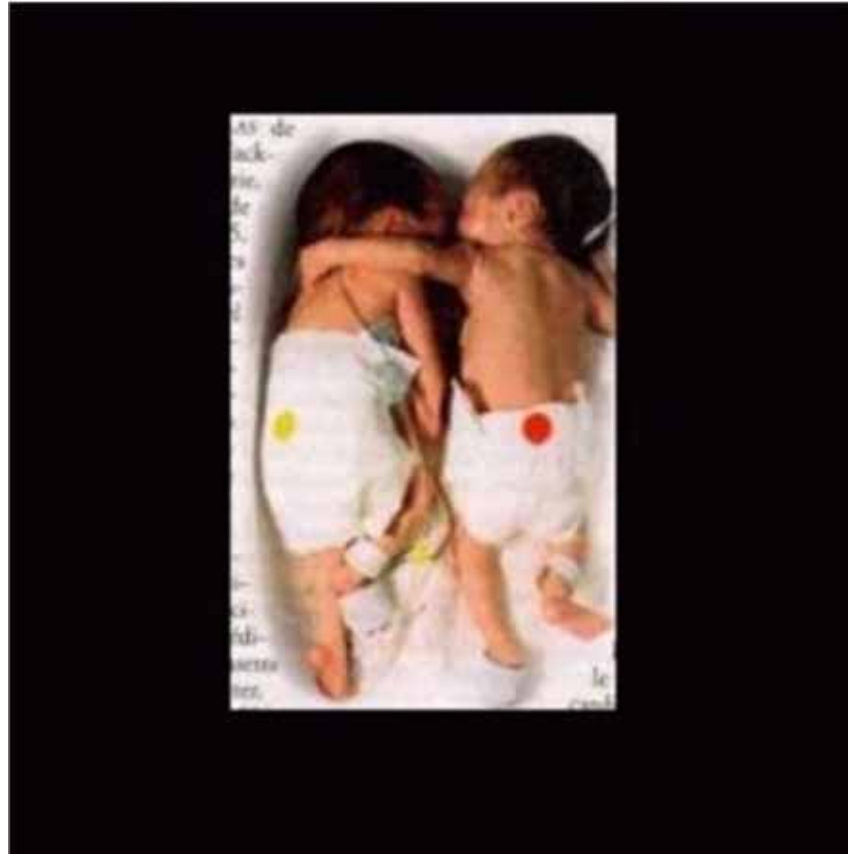
**G
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Anything is possible



Physical Rapport



Read the donor

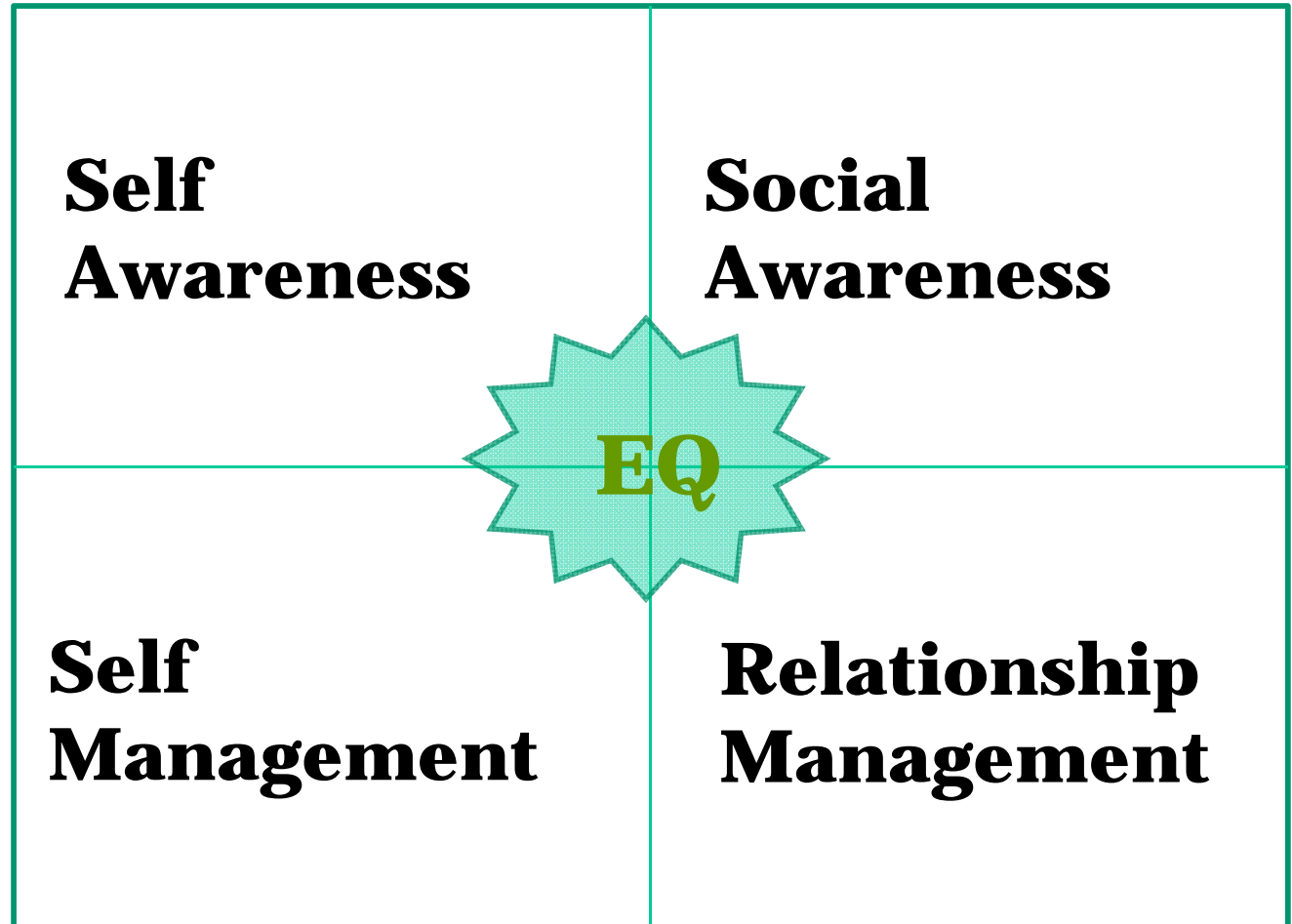
Master Gift officers can “read” people. Most do this unconsciously. They are **“Unconscious Competents”**.

We can all become **“Conscious Competents”** through basic education in Behavioral Type, Emotional Intelligence, and NLP.

Whether you are already an “Unconscious Competent” or not, these tools will empower you to **intentionally design your behavior** for success with your donors.



**Emotional
Intelligence**



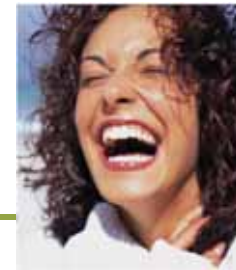
Benefits of EQ



- Increased Productivity
- Increased Optimism
- Increased Heart Health
- Long Term Relationship Success
- Increased Job Success

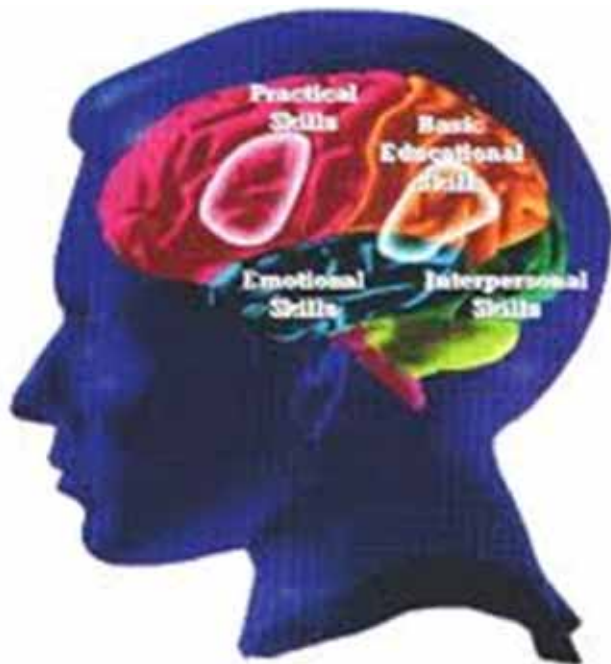
People with high EQ

- Routinely experience a full range of feeling
- Do not suppress, numb, or judge feelings
- Use emotional experience in decision-making



Learn EQ

- EQ is learned, not necessarily hardwired
- The brain remains plastic throughout life
- EQ can be learned at any time



Self management tools



Changing “state”

- Time Out
- Reframing
- Exercise
- Relaxation
- *Positive Hallucinations*

The power of a smile when you are all alone

Smile



Social awareness tools



Social

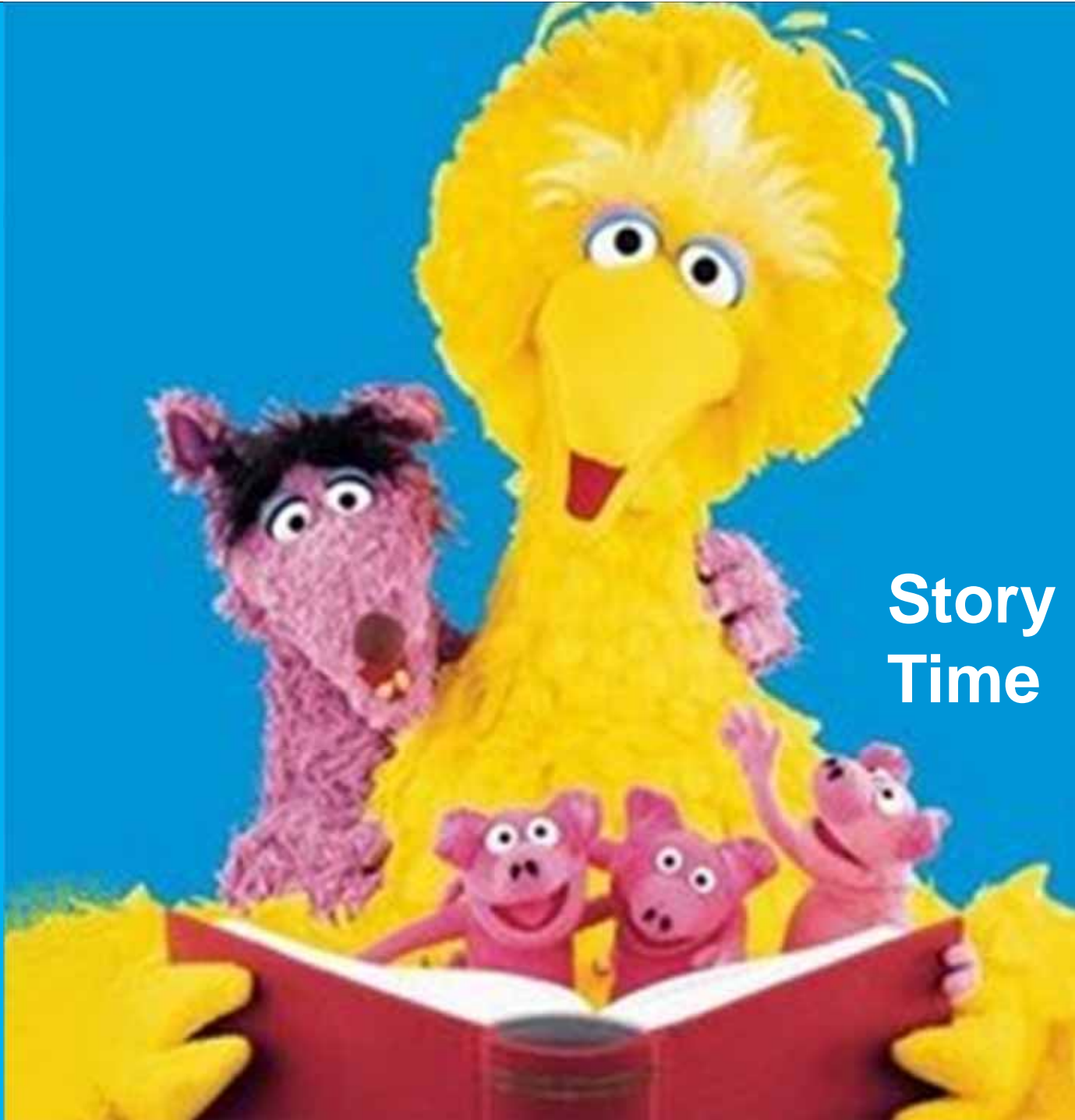
- Non-judgmental listening
- Active listening
- Are you showing empathy
- Make eye contact with everyone

Relationship management tools



Social & Genuine

- Empathy
- Caring
- Rapport
 - Reciprocity
 - Responsibility
 - Resilience
- Conflict Resolution



**Story
Time**

Bob and Marilyn in NYC



Year of ask:	1997
Cause:	Diabetes research
Donor net worth:	\$500 million+
Occupation:	Major investor, late 70's
Ask amount:	\$20,000,000 lead trust
Principle:	Research pays off

Find the points of rapport

Bob and Marilyn in NYC



OUTCOME:

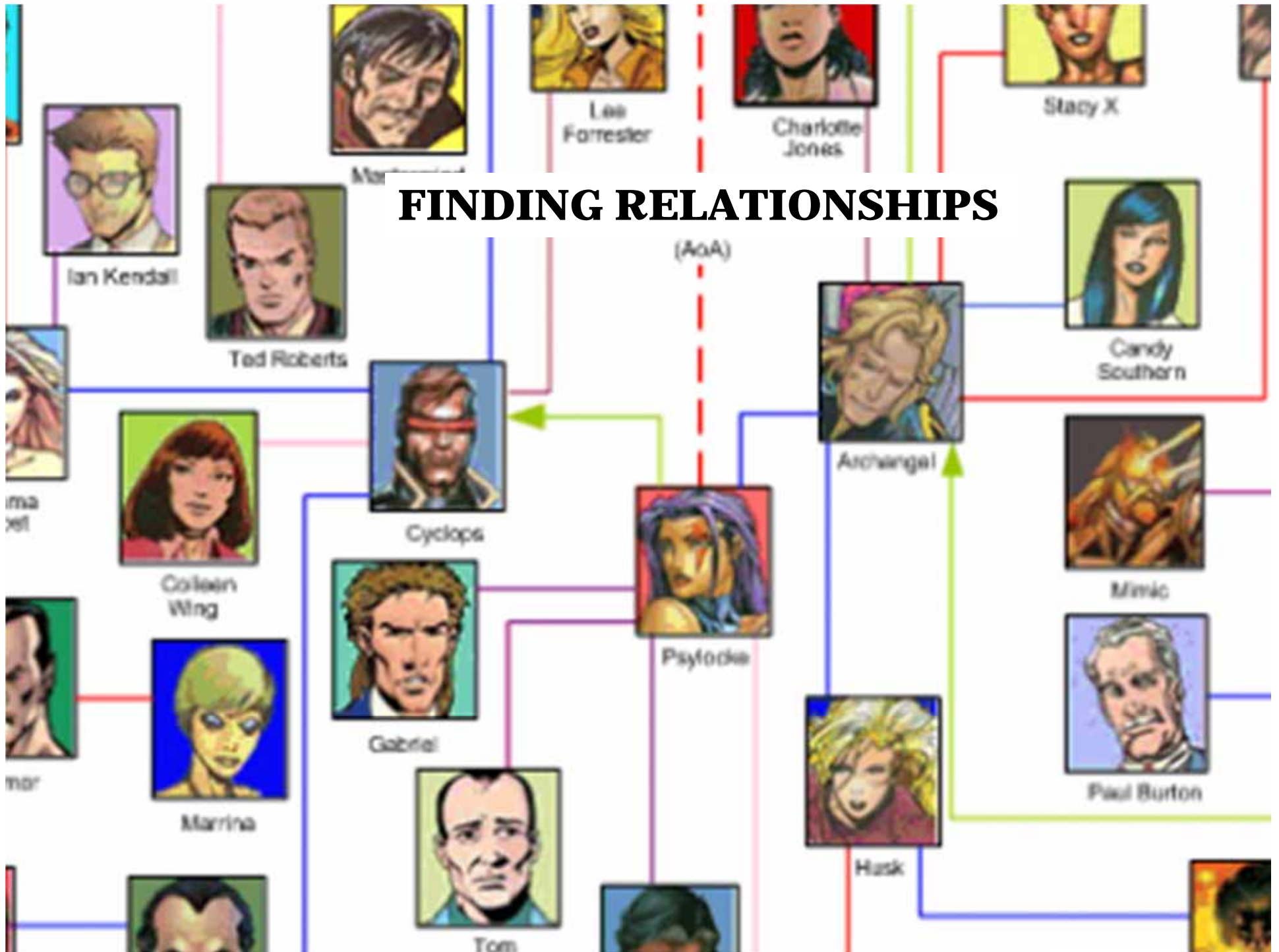
\$2.5 million gift to JDRF

\$5 million gift to Rockefeller University

LEARNING POINTS:

- Great wealth can be found behind small checks
- Getting prospects to cultivation events
- Respect confidentiality
- Competing organizations may dovetail on your work
- Understand how money works
- Be willing to hand off the relationship
- Listen to the donor's wishes
- Persistence pays off in the context of a relationship.
- Design your ask in response to the circumstances.

FINDING RELATIONSHIPS



Relationships are the key to expanding your Short List of Prospects

- Always have a list of **elusive** prospects on your mind
- Believe in **6 degrees** of separation to your target
- At every opportunity, **ask about a connection** to the elusive prospect from the volunteer / donor / board member

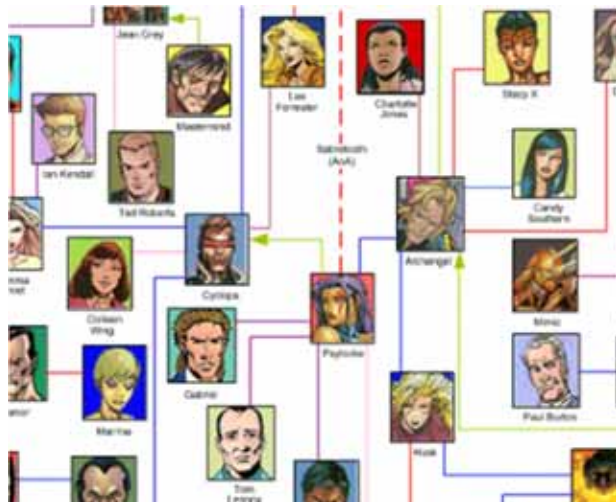


Master gift officers build alliances and use the tools

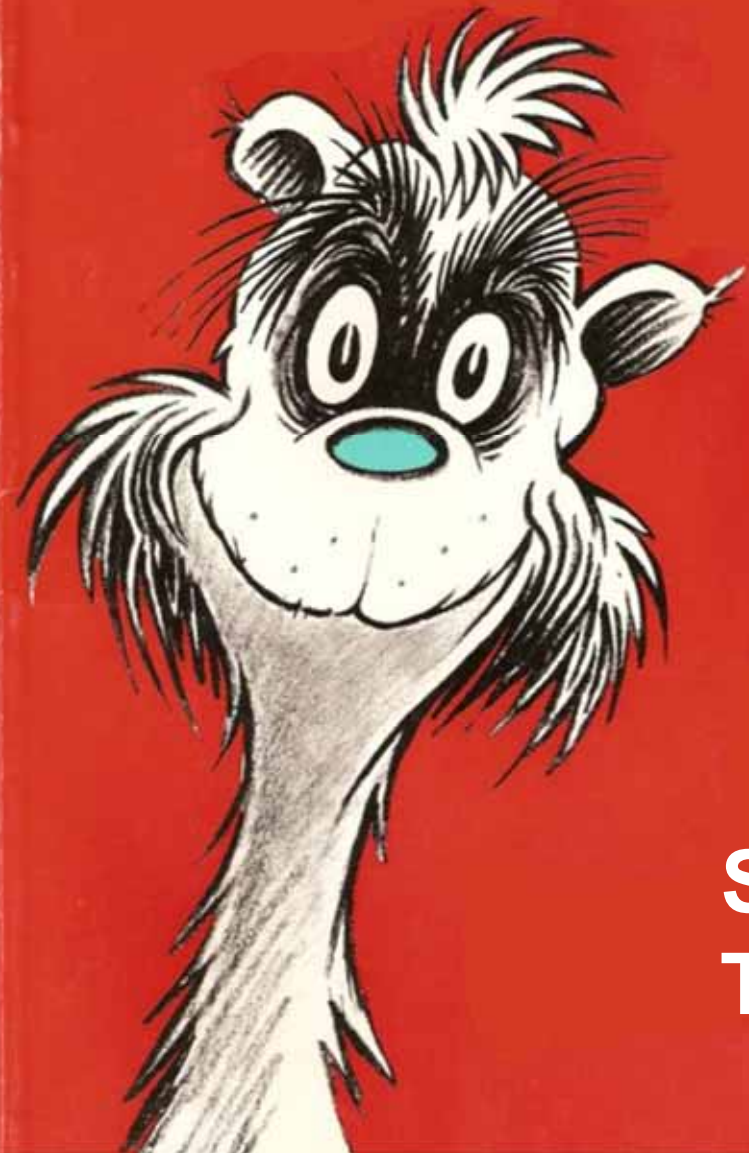
1. Do relationship screening with volunteers and program staff
2. Build the relationship database
3. Construct engagement and solicitation strategies
4. Work with and through volunteers to meet with donors and learn their interests and styles



Relationship map



<u>LAST NAME</u>	<u>FIRST NAME</u>	<u>RELATIONSHIP LEVEL</u>	<u>VOLUNTEER</u>
And	Noreen	3	KIBBE
And	Noreen	3	SALLY
And	Noreen	1	JOE
Aron	Steven	3	RICK
Aron	Steven	1	CURT
Bat	Robert	3	JIM
Bat	Robert	3	JON
Bat	Robert	2	CURT
Bat	Robert	1	SALLY
Beck	Ralph	2	SALLY
Beck	Ralph	1	LIZ
Benne	Oliver	3.5	KEN
Benne	Oliver	3	JIM
Benne	Oliver	3	JON
Benne	Oliver	3	RICK
Benne	Oliver	3	SALLY
Benne	Oliver	2	KIBBE
Benne	Oliver	2	LISA
Benne	Oliver	2	PAUL
Benne	Oliver	1	JACK
Benne	Oliver	1	JOE
Benne	Oliver	1	MICHAEL



**Story
Time**

Ernie and Lee



Year of ask:	2006
Cause:	Diabetes researcher
Donor net worth:	\$500 million+
Occupation:	Major auto dealer
Ask amount:	\$1,000,000 given or gotten
Principle:	Make opportunities and recognize opportunities

Find the points of rapport

Ernie and Lee



OUTCOME:

There was a two year hiatus in interaction; Ernie is back engaged by the board member and the researcher.

LEARNING POINTS:

- Six points of separation prevails
- Use VIP volunteers and staff when needed
- Be patient
- Be prepared for any outcome and dancing on your feet
- The power of one's ego...both ways
- Getting to YES sometimes means moving past NO

Mike in Manhattan



Year of ask:	1998
Cause:	Diabetes research campaign
Donor net worth:	\$20 million+
Occupation:	Manager of some of Saudi Family wealth
Ask amount:	\$250,000 outright gift
Principle:	Getting to yes may be a bumpy ride--hang on. Keep your eye on the ball

Mike in Manhattan



OUTCOME

Mike committed to a \$100,000 gift

LEARNING POINTS:

- Be very choosy when bringing VIPs to a solicitation
- Stuff happens, so use the best technology for up to the minute news
- Take the cue from the donor for access to greater wealth in the family
- Be prepared to resize the expectations and arguments; be flexible

Goodwill Hunting

Year of ask:	2000
Cause:	Goodwill facilities campaign
Donor net worth:	\$200 million+
Occupation:	Founders of 22 store discount retail chain, both in late 60's (Chuck and Doreen)
Ask amount:	\$600,000 outright gift to name a room
Principle:	The most important major gift marketing strategy is building relationship networks.



Goodwill Hunting

OUTCOME

- 2 months later Chuck and Doreen agreed to a \$500,000 and to join the board
- 1 month later Chuck and Doreen offered \$500,000 in merchandize to sell in the Goodwill stores
- *As fate would have it, Chuck and Doreen were about to sell their business and take an apartment in Boston and establish a family foundation.*

LEARNING POINTS:

- Call your donors and talk to them
- Timing matters
- Everyone is capable of providing a good lead
- Get the donors to “touch” the mission (the tour was quite moving for them)
- The traditional 18 month cultivation cycle does not always apply
- Gifts can precede leadership involvement



**Special
Olympics
MA**

Year of ask:	2007
Cause:	campaign
Donor net worth:	\$75 million+
Occupation:	VC
Ask amount:	\$1,000,000
Principle:	Look close to home to building relationship networks



Special Olympics MA

OUTCOME

- \$500,000 gift / room naming

LEARNING POINTS

- Look to staff members for leads
- Be bold when asking volunteers for involvement
- Use the relationships of others if possible
- Appeal to the emotional and business cases



Special Olympics
Massachusetts

Your chances of getting a gift (or board member) are much better if you ask for it than if you don't ask.

Larry G. Raff

Truism 2



Dogs always ask for what they want.



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