MAJOR GIFT ROADMAP 2020

With Gail Perry and Dr. Kathryn Gamble

Webinar #1: Build Your Team, Culture and Mindset

- Learn the major gift million dollar mindset (relationships vs transactional approach)-
- Developing an organizational culture to support major gifts (from fundraising to philanthropy)
- Approaches to overcoming organizational obstacles.
- Setting priorities for major gift fundraising, making your time commitment.
- Organizing and mobilizing your Major Gifts Team.
- The 3 major elements of every major gift program.What are you raising money for? Shaping donor offers

Webinar #2: Prospect Management: Prospect Research & Portfolio

- Analysis Pulling the right reports and interpreting your data (gift history, screenings, etc).
- Looking for new gift opportunities from high-value prospects within your donor data.
- Getting the most from prospect research.Estimating the value and timing of your prospect portfolio.
- Quantifying your prospect portfolio with rating systems.
- Managing your assigned portfolio and your organization's overall pipeline of major gift prospects.
- Creating structure, metrics and accountability to measure your progress..How to focus on the right prospects to conserve time and increase productivity.
- Setting up your working list: easy access to manage your prospect list.
- Defining the fields you need to track on your working list.

Webinar #3: Field Research: The Discovery Process and Qualification Boot Camp

- How to qualify a donor over the phone.
- Making the appointment for a discovery visit.
- Advanced discovery and qualification skills all fundraisers need to know.
- The Discovery process: the five principles for discovering and qualifying major donors today.
- How do we determine a donor's potential gift capacity by talking to them?
- What are we listening for the donor to say?
- Building Donor Profiles: using the right information to help you cultivate your donor deeply and happily.

Webinar #4: Creating Cultivation Strategies; Structure, Metrics and Moves Management

- Advanced prospect management skills to optimize relationships with the right people. How do you measure a relationship?
- Tracking the correct data points on a donor.
- Organizing a moves management plan to track and manage your cultivation activities.
- How to set up volunteer screening sessions to review prospects with key volunteers.
- Setting a realistic major gift goal for this year.
- The three basic types of information to feed into your moves management.
- Deciding which relationship strategies will work the best for a particular donor.
- Setting up a system to create effective, actionable cultivation Plans for your top donors.

Webinar #5: Getting Appointments and Making Discovery Calls

- Creative ways to get appointments and getting in the door.
- Many strategies for reaching out to a donor.
- How to have discovery visits that are fun for both you and your donor.
- Power Discovery Questions that reveal your donor’s passions, interests and hot buttons.
- Power conversations that move your donor forward.How to tell if your prospect is ready to give early in the game.
- How to get max results from your visits by setting objectives beforehand.

Webinar #6: Cultivation and Relational Skills to Build a Partnership (Mastering the Soft Skills)

- What does the cultivation process look like?
- How to have successful cultivation visits with donors.
- Power listening skills to make your donor comfortable.
- Building credibility and trust in the donor relationship.
- The likeability factor: etiquette pointers to enhance major donor relationships.
- Learning how to make a successful advice visit.Seamless conversation skills to light a fire with your donor and inspire them to offer more support than ever.
- Donor-centered conversations and questions that directly lead to an ask.

Webinar #7: Preparing Your Donor For a Transformational Ask

- How to ask for permission to ask.
- Key insights about asking: why people give.
- How to warm up your donor for an ask so they are ready and prepared.
- What are we asking money for – getting precise about your project priorities and donor offers.
- Preparing carefully: the seven questions to answer before you make the ask.How to test for the right dollar amount.

Webinar #8 : Conversation-Based Asking and Closing Techniques

- Preparing for the ask visit - get your mindset in the right place.
- Coaching on asking – overcome anxiety and fear.
- Who should go on the ask visit?Presenting your case: shaping your project into an exciting opportunity.
- Solicitation is a conversation!
- Creating an ask within an easy, back-and-forth conversation.
- Ways to frame the ask, so the donor is receptive and open.
- Dealing with your donor's objections.
- How and when to follow up the ask: how followup can make or break the donor's gift.