

The Art of Conversation

Kathryne Cardwell, B.A., CFRE
Gift Planning Associate
The Winnipeg Foundation



The conversation paradox

To have a good conversation, all you really have to do is listen. Listening well shows your interest and gives a very positive impression.

- *The Emily Post Institute*

Your brain on planned giving*

- Bequest giving and current giving use different parts of the brain.
- We think about charitable bequests with the part of our brain that forms our *visual* autobiography.
- Charitable bequest decision making reminds one of one's mortality.

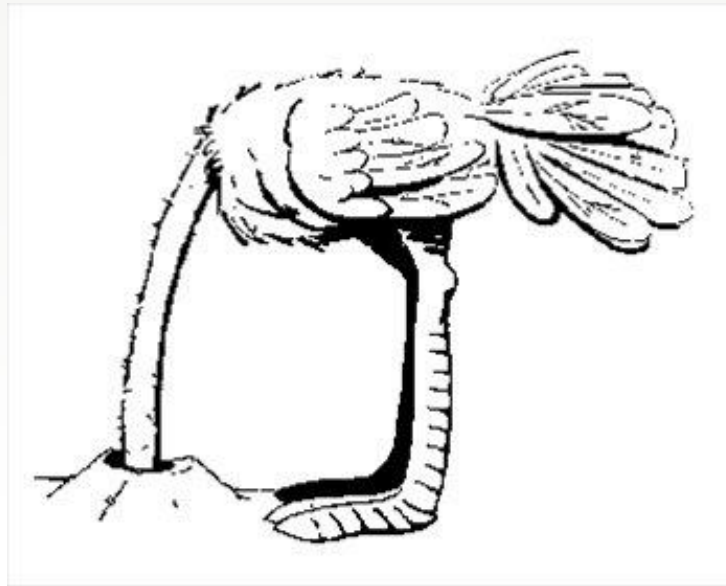
**Adapted from Russell James, MichaelRosenSays.Wordpress.com and OnTrackFundraising.com*

What does this mean?

- The decision to make a charitable bequest is linked to the donor's *visual* autobiography—not the organization's needs.
- If your organization is connected to that person's sense of self, it's more likely that person will leave a bequest.
- People generally react to thoughts of their own death in one of two ways...

**Adapted from Russell James, MichaelRosenSays.Wordpress.com and OnTrackFundraising.com/blog*

Avoid it...



“If I don’t think about it, it won’t happen...”

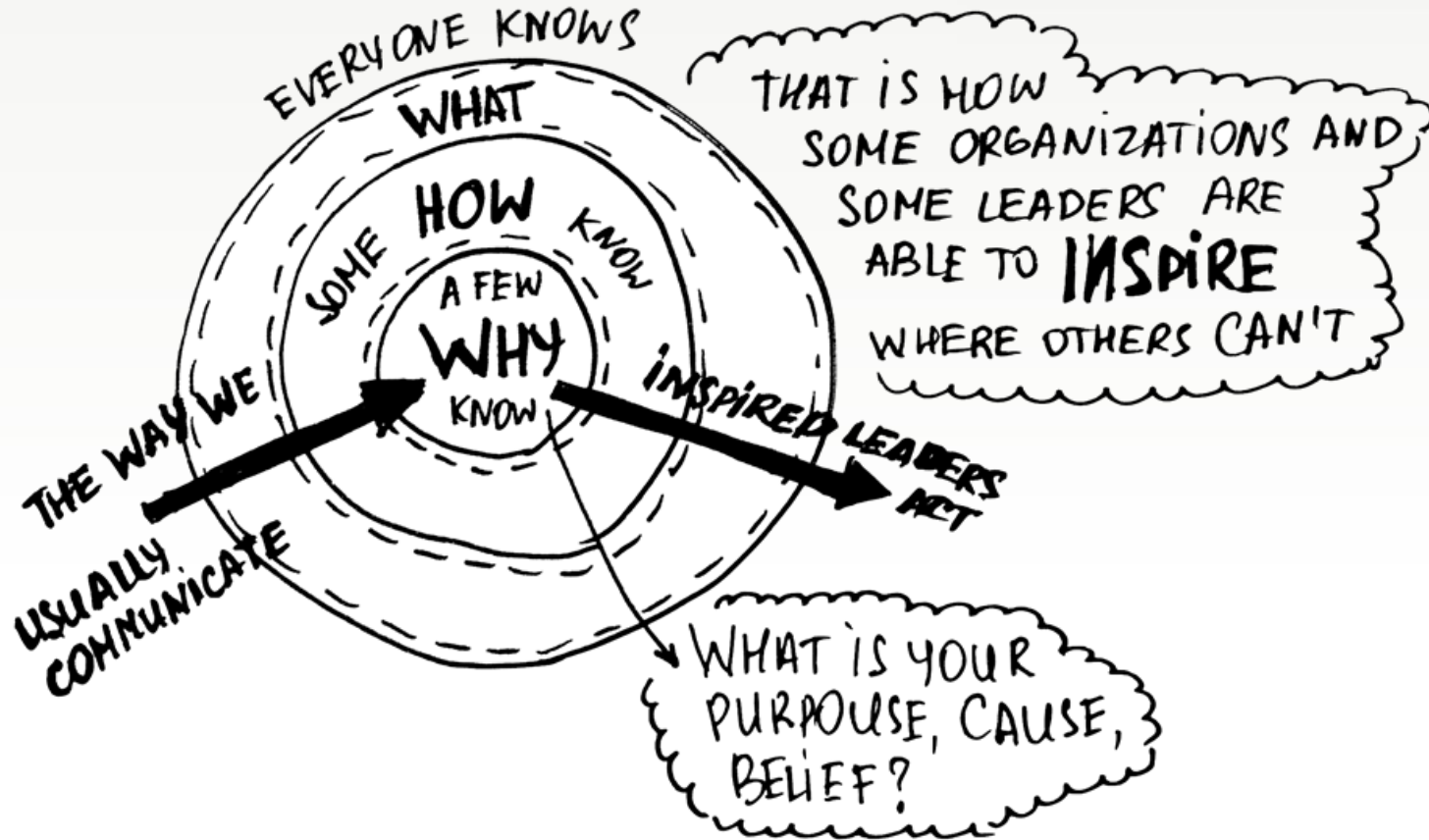
Become immortal!



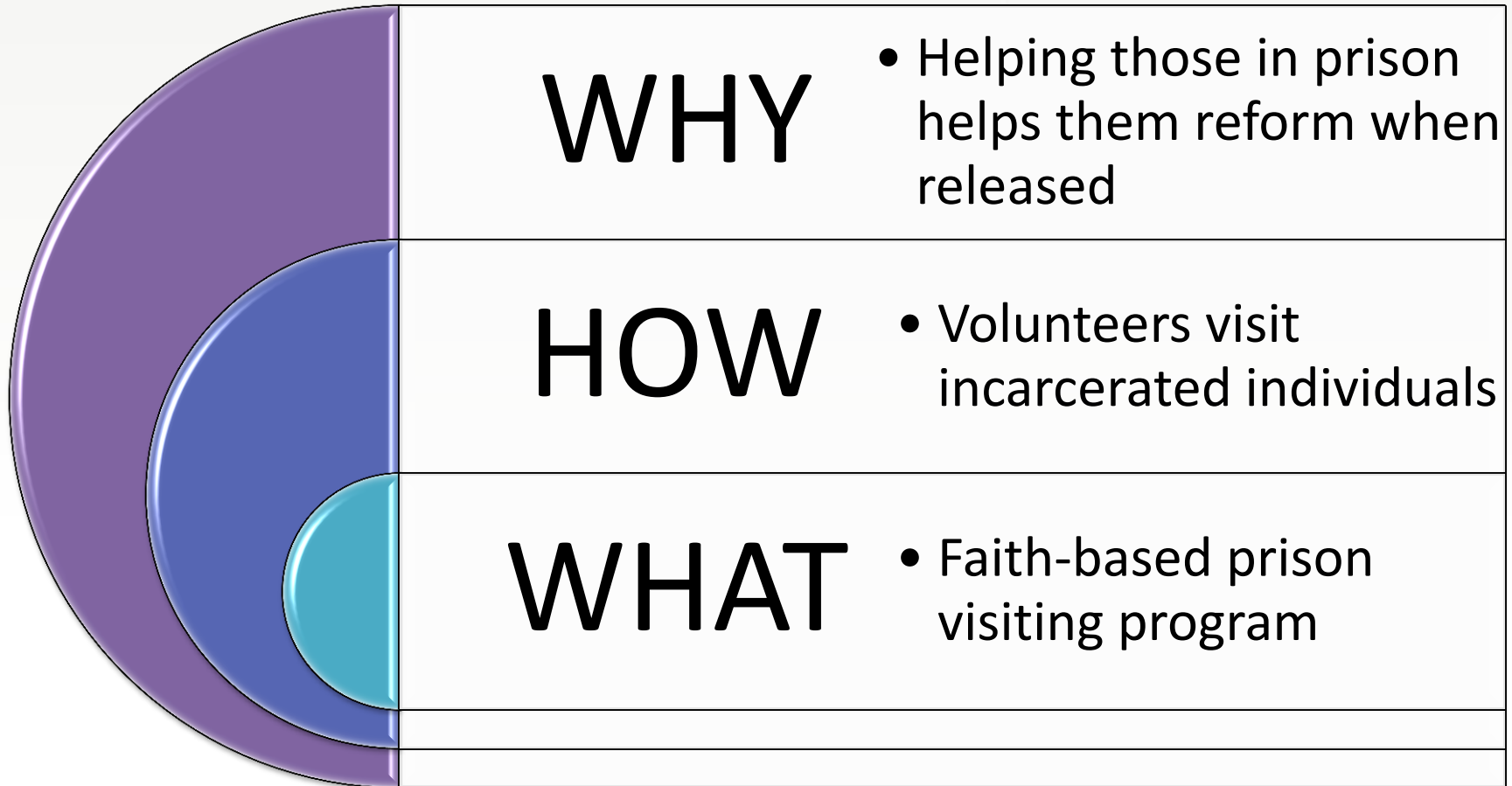
“I’ll keep my memory alive forever!”

Your strategy, Part One*

Start with WHY



**Simon Sinek and David Mead, Start With Why*



Your strategy, Part Two*

- Focus on donors and stories – don't pitch anything
- Use visual cues
- Match your needs with the donor's autobiography: *"I want kids to have the same experience at camp as I did!"*
- Establish artificial deadlines and urgency...?
- Suggest opportunities that provide a lasting memorial
- Emphasize your organization's long-term stability

**MichaelRosenSays.wordpress.com and Russell James*

Dilbert®



Not recommended

PG Prospect Categories



- Self-identifying individuals
- Established lifetime donors
- True planned giving prospects

Preparing for the call

- Review donor record
- Google – especially when meeting for the first time
- Bring at least one piece of business
- Bring a story
 - From your organization...
 - From a donor...
 - From you...

Remember mom's rules

- Primp
- Offer a business card
- Unless the donor brings it up, don't jump right into business
- Eat the cookies, drink the tea—if someone's gone to the trouble, make sure it was worth it
- Respect their boundaries
- Compliment cautiously
- Let them talk

Q & As: Part One

- Tell me about your connection to (organization)
- You've been giving so generously for 15 years! What keeps you going?
- What made you think of The Foundation as a place to create your legacy?
- How do you see our organization's role in the community?
- What do you think our organization could do better?

What else?

Q & As: Part Two

- What causes are you really passionate about? Why?
- If you could instantly solve one of the world's problems, what would it be and why?
- You are so generous—what inspired your philanthropy?
- What do you remember about your first day at University?
- Tell me about some of the art exhibits you connected with. Why?
- Is there a play that you feel describes your own life?
- Do you remember how you felt after you made your first gift?
- Who has had the biggest influence on you, and how?

Active listening

- Body language
- Facial expressions
- Clarify statements
- Conversation prompts
- Open up!



Gauging interest

- Gratitude towards organization
- Honour or memorialize someone
- Provide opportunities for others
- Help others as they were helped
- Make a difference in a cause they care about
- Leave a legacy
- Make a gift not possible during life
- What else? And what's missing?

Where to go now?



Where to go now?

- Share stories
- Create a link between the conversation and your organization
- Offer opportunities and information
- Explain your role
- Follow up on previous materials, events or conversations about legacy giving



How to ask

- “Have you ever thought of putting a gift in place that could continue your generosity?”
- “Many individuals who haven’t felt comfortable making a large commitment during their lifetime have done so through a legacy gift in their Will. Is this something you can see yourself doing?”
- “Are you thinking about becoming a member of our legacy society?”
- “We occasionally hold information sessions about legacy gifts. Is this something you’d like us to include you in?”
- “Would you like to see some information about creating a legacy?”

Continuing the conversation

- Follow up as necessary
 - Say thank you!
 - Send information
 - Invite to events
- Continue relationship
- Confirm interest down the line

After all calls...



Questions?



Thank You!

Kathryne Cardwell, BA, CFRE, Gift Planning Associate
kcardwell@wpgfdn.org or **204.944.9474**

Sources

Steven Byers

- *OnTrackFundraising.com/blog*

Leah Eustace

- Good Works Company, Goodworksco.ca

Russell James

- “Planned Giving and the Brain,” slideshare.net/rnja8c/planned-giving-and-the-brain

Simone Joyaux & Tom Ahern

- *Keep Your Donors: The Guide to Better Communications & Stronger Relationships*

Michael J. Rosen

- *Donor-Centered Planned Gift Marketing*
- Michaelrosensays.wordpress.com

Simon Sinek & David Mead

- *Start With Why*