

## Listen to Customer Values

parents, grandparents, donors, and prospective  
student families

Tom Wilson

**Campbell & Company**



PNAIS

Skamania Lodge

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## Tom Wilson

Trusted Advisor & Coach

- 1) Classical musician, conductor, teacher, jazz saxophone
- 2) 30 years of encouraging donors & nonprofits
- 3) Weblog -  MajorGiftsGuru.com
- 4) Certified trainer Peter F. Drucker  
The 5 Most Important Questions 
- 5) High school music teacher in suburban Chicago, youth orchestra conductor

**Winning Gifts**  
**Make Your Donors Feel Like Winners**  
Wiley & Sons 2008



I. **A Winning Gift for Your Donor**

- 1) People Centered Fundraising
- 2) Donor Values
- 3) Listen

II. **Winning Gifts for Your Organization**

- 4) Make Your Case
- 5) The Win Win Ask
- 6) After Winning the Gift

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**Market & understand your customers  
through good listening**

- 1) Collective and individual listening
- 2) Tools for deep listening
- 3) Listening during the ask

## Start with peoples' needs

Use a marketing approach

*"You must discover and communicate something of unique value to your customers."*

*"It all comes down to customers."*

*"Focus on what you will do for your customer."*

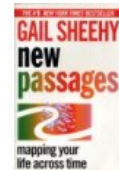
Schewe & Hiam

*The Portable MBA in Marketing*

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## *New Passages*

Gail Sheehy



Generations have moved older by 10 years

- Adolescence to 28
- Middle age to 50
- Old age to 80

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## Implications for philanthropic fundraising



Prime philanthropic age is now 61

IU Center on Philanthropy / Bank of America study

- Philanthropic age will continue to increase

Many retirees will be great, long-term volunteers

- Significance and meaning more important than constant leisure
- A woman age 65 has a life expectancy of 79
- A man 75

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## Implications for philanthropic fundraising

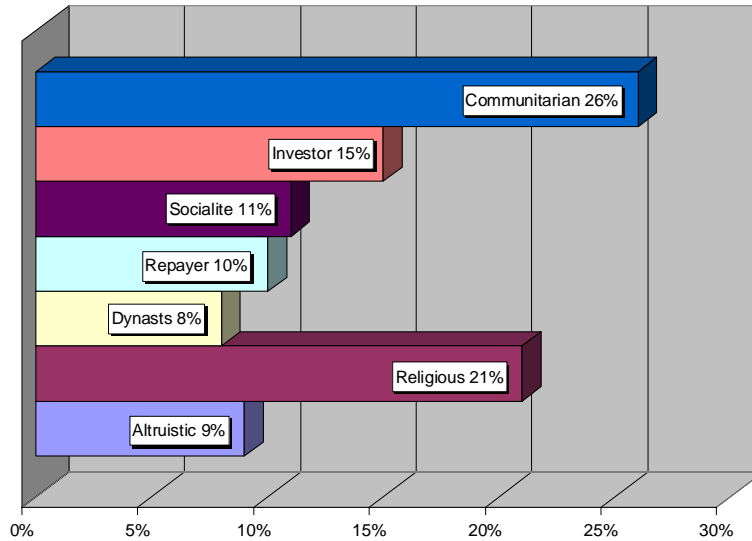


What should people do with their estates?

- Children have made it . . . or not
- Grandchildren — help but don't destroy
- Leaving a legacy to their favorite nonprofits
  - A gift to the government ?

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## *The Seven Faces of Philanthropy* Prince & File



## The Six I's of Philanthropic Fundraising



## **Seek First To Understand, Then To Be Understood**

Stephen R. Covey Habit #5

Empathetic Listening



Diagnose before you prescribe

Being influence-able  
is the key to influencing others

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## **First listen to yourself**

*Sphere of Silence*

Set aside an hour a day of quiet reflection

- Sit quietly, silence is critical
- Pace, work out, or walk

What went well yesterday?

- What could you have improved?

What's important today? This week?

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**Listen & Learn**

not tell & sell

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**Start with collective listening**

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## What collective listening can you do?

\* Seek feedback every time verbally and in writing

- Board meetings
- Committees
- Special events

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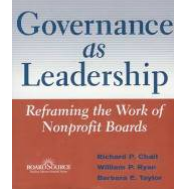
## Societal examples of collective listening

- 1) The comment card in your hotel room
- 2) American Idol

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## Create board discussions so you can listen

- \* Discuss opportunities and challenges
- \* Tests assumptions & invites alternative hypotheses
- \* 30 minutes of lively, interactive discussion at every board meeting



BoardSource  
Wiley 2005

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## Listening to your board

- 1) Create a feedback form for every board member to complete at every meeting
  - a) How could we improve the meeting?
  - b) What would you like to know that we didn't cover fully enough today?
  - c) What would you like to see at future meetings?
- 2) Appoint a rotating board monitor to reflect on meeting success
  - The monitor closes each meeting

## Participative focus groups

\* Invite your best donors so you can listen

- Hold 3+ sessions - to engage, be flexible

1) 90 minute sessions starting with case outline presentation 30 minutes

2) Facilitator activates discussion

a) Feedback form 5 minutes

b) Small group discussions 30 minutes

c) Reporting out to the whole group 25 minutes

3) Staff listens and debriefs later

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## Straw polls

Paper ballots

Color cards

Electronic voting pads

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## **One on one listening**

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## **Thank you visits**

### *Get acquainted*

- \$1,000 or more gifts
  - Deliver a memento
- Request gift designation
  - \$5,000 or more

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## **Kaizen calls**

Continuous process improvement

### Gift club benefit testing

- Do you value what we're offering

### Special events sponsors

- Are you getting the visibility you expected?

### Donor stewardship

- Do you feel recognized and informed properly?

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## **The philanthropic market research study**

The feasibility or planning study is a massive,  
highly-organizing, listening exercise

- Don't miss the opportunity
- Post campaign client comment
  - *"I didn't realize how important these interviews were"*
- Don't rush the process
  - You're cultivating donors as you listen

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## Internet listening strategies

Ask people for feedback through your website

- University of Pennsylvania's donor pop-up

Engagement surveys



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## Entrance Interviews

For new families

- Tell us about your decision
- What are your expectations of us?
- What talents could you provide to help us?

For new board members

- What board experience do you have?
  - Best experiences?
- What committee(s) would you like to serve?

## **Exit Interviews**

Families, board members, staff

- What is the best thing about our organization?
- How can we improve?
- How should we stay connected in the future?

## **Self Assessments**

Ask board members to complete yearly

- An opportunity for listening and mid-course corrections

All staff as part of their yearly reviews

- They may be harder on themselves than you would be
- An opportunity to listen and coach

## **Listen to history**

Personal histories with your organization

The heritage of your organization

- Read old board minutes
- An oral history project can be powerful
- Use emeritus board status to continue engagement with key leaders of the past

## **Understand how to become a deep listener**



Peter F. Drucker  
**The 5 Most Important Questions**

*Customer value— is so complicated that it can only be answered by customers themselves.*

*"There are no irrational customers . . . .  
customers behave rationally in terms of their  
own realities."*



## Reader or listener

Drucker

- *"It's like being either right or left handed"*

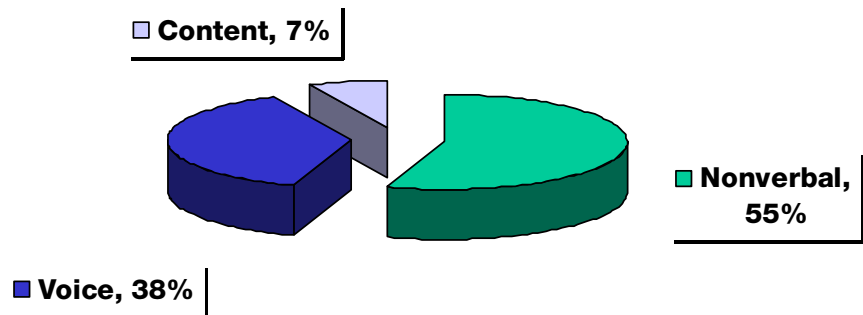
Don't assume

- Observe
- Normally you have a mixed group

Learning theory - present verbally **and** visually

- It's better for everyone

## The importance of face-to-face donor meetings



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## Be a keen observer

What nonverbal cues did you pick up?

Any tips from the setting (home or office)?

Dress, personal style?

Energy? Listening and learning style?

When did their eyes light up?

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## *Listen Up*

Larry Barker, PhD & Kittie Watson, PhD

### People Oriented Listeners

- Listens to understand the emotions of others

### Action Oriented Listeners

- Prefers to listen in outline form

### Content Oriented Listeners

- Carefully evaluates everything they hear

### Time Oriented Listeners

- Clock watchers

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## *Six Parallel Ways of Thinking*

Edward de Bono

### Blue Thinking Hat

- Focus and organization

### White Thinking Hat

- Objective facts

### Red Thinking Hat

- Subjective emotions

### Yellow Thinking Hat

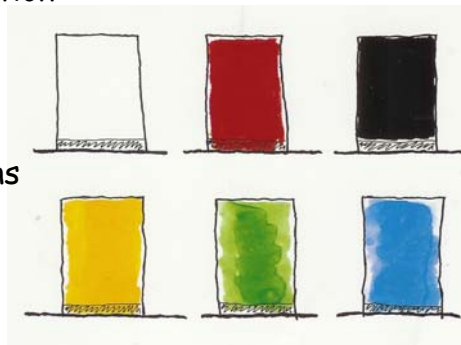
- Valuable benefits

### Black Thinking Hat

- Careful assessments

### Green Thinking Hat

- Creative modifications



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## Talking & listening

The average person

- Talks at a rate of around 150 words per minute
- Listens at a rate of 500 words per minute
  - Take notes to slow down your listening
  - Without visual cues, phone listening is tough

Are you really listening?

Are you being heard?

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## Be systematic

Have a set of questions on a form

Use a notepad to show you are listening

Capture your interactions in contact reports

Be patient with your listening

- It can take 6 meetings for a big gift
- Double that for a planned estate gift

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## Requesting a listening meeting

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## Use a pre-approach letter

Send reaction materials with the letter

- Have a genuine listening agenda
  - Test gift club benefits
  - Annual fund case
  - How to improve the gala

Letter PS

- Lock up your checkbook — a “no ask” meeting

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## **The appointment setting phone call**

- 1) Find the best, high-energy time of day
- 2) Use a private space and a key-points script
- 3) Stand up & smile, use your hands, think energy
- 4) Re-affirm the "no ask" meeting rule
- 5) Offer flexibility of meeting place & time

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## **Preparing for the meeting**

- a) Send note of meeting day, time, place
- b) Call the day before to confirm the meeting
- c) Review prospect research
- d) Check your calling book for copy of the case, reaction list

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## **Starting the listening session**

Confirm your agenda

- Verify time frame for the session

Listening

- Relationship building
  - Find out what makes them tick
- Reactions to materials

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**Be curious**

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**Take notes**

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**Restate to clarify  
what you've heard**

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## Share yourself

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## Occasional, energy interruptions are okay

\* Even though you're there to listen, a few interruptions are okay

- They show interest and energy
- Listen to great interviewers

- Terri Gross of NPR's *Fresh Air*

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## Be trust worthy

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## Reflective listening

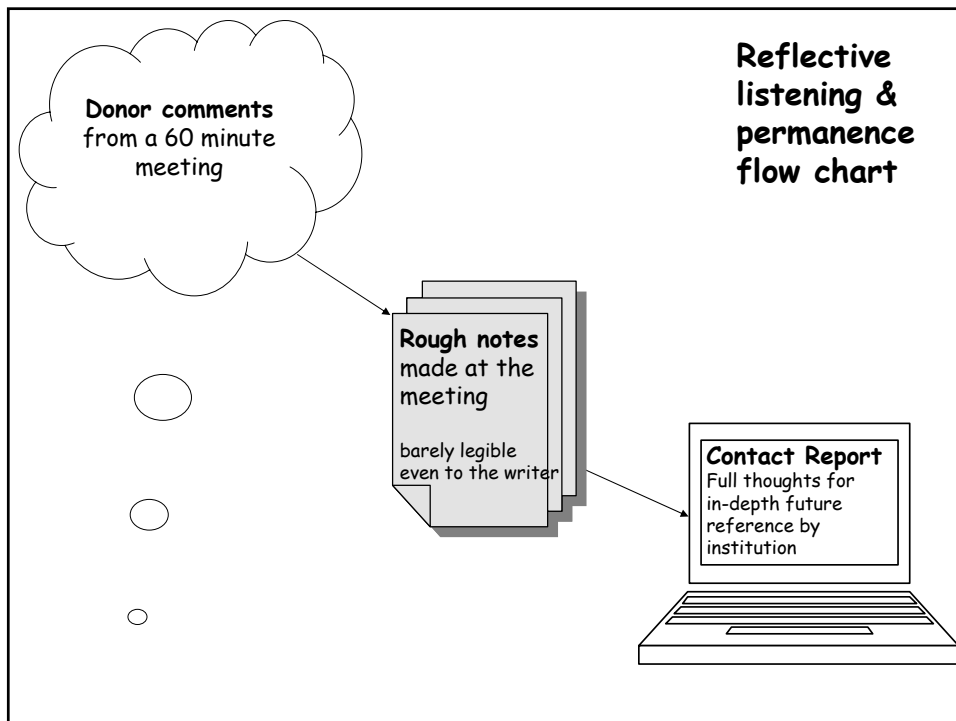
Write up your contact report

- What did you hear?
  - Use your data base
  - If not qualified for a higher gift, you're done
  - If a six-figure prospect — write a couple of paragraphs on what you discovered
  - If a seven- or eight-figure prospect — write everything you can remember
    - » A total brain dump

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# Brain cells in my finger tips

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## The ideal ask team

### Fundraising volunteer

- Open the door, present outside credibility
  - Ideally, make the ask

### Head of School (faculty)

- Share organizational vision
  - How this gift will benefit the community

### Fundraiser

- *Active listener*, orchestrate presentation
  - Ask (if needed)

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## The volunteer's role in an ask meeting

Review what you've heard them say about your organization's impact in the community

- How can this be strengthened?

Ask them to talk about their gift decision and level

Are they willing to ask?

- If so, get into training mode

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**Listening during the ask**

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**The problem of too much  
presenting  
and not enough  
listening**

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## **During the ask meeting**

Present and listen . . . present and listen

- The fundraiser's job is to keep a balance

Draw out the prospect

After the ask . . .

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## **The pregnant pause**

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