

# After the Yes: Questions You Can Ask Donors



If you and your colleagues are new to face-to-face fundraising, you're probably focusing on "the ask" and how to frame your request in the most compelling, inspiring way. Without a doubt, a strong pitch is one of the keys to successful fundraising—but then what? When you hear the words "Yes, I'd like to help," how do you respond? This exercise will help you develop a set of follow-up questions to better serve your donors and strengthen these relationships.

In the accompanying handouts, we've included several sample questions with the caution that not every question applies to every donor or every visit. This is a conversation or perhaps a negotiation—not an interrogation. Choose the questions that seem most relevant and adapt them to your needs and circumstances.

## **Why Do This Exercise?**

To emphasize fundraising is about serving the donor—and if you don't know what the donor wants, you can't provide good service

## **Use This Exercise When**

You and your team are comfortable with "the ask" and you're ready to focus on the next steps you can take with your donors

## **Time Required**

About 20 minutes

## **Audience**

Anyone involved with your fundraising campaign: some combination of board, staff, and volunteers

## **Setting**

A space large enough to accommodate several small groups of three to five each

## **Materials**

- After the Yes: Sample Questions (pages 164-165)
- After the Yes: Donor Tracking Form (pages 166-167)

## **FACILITATING THE EXERCISE**

1. In advance, make photocopies of the handouts listed above.
2. Ask your colleagues to form small groups of three to five per group to discuss and answer the following question: "When you meet with a donor and he or she makes a verbal commitment—'Yes, I'd like to give'—what

follow-up questions should you ask after thanking the donor for his or her gift?” As an example, you might offer the following question: “May we include your name in our published list of donors, or would you prefer to be anonymous?”

3. After five to ten minutes, distribute the handout “After the Yes: Sample Questions” on pages 164-165. Instruct the groups to compare their questions with the ones included in the handout. Which ones are similar? Did they come up with any questions not included in the handout?
4. After a minute, distribute the handout “After the Yes: Donor Tracking Form” on pages 166-167. Give everyone a minute or two to look it over, explaining that the work from this exercise can be captured in a tracking form to use when talking with donors. Take questions as needed.
5. Debrief the exercise using some combination of the following questions:
  - From your perspective, which of these questions are most important? Why?
  - How would you present these questions without making the donor feel like it’s an interrogation?
  - As a donor yourself, what is the most meaningful thing an organization can do after you give?

*This exercise is adapted from an article that first appeared in the Grassroots Fundraising Journal, [www.grassrootsfundraising.org](http://www.grassrootsfundraising.org). Many thanks to our colleague and article co-author Harvey McKinnon.*

**TRAINING TIP** One way to stimulate discussion is to reverse roles and say to your colleagues, “Imagine that you’re the donor. You’ve just been solicited for a significant donation and agreed to give. What questions would you like to be asked in that moment?”

# After the Yes

## SAMPLE QUESTIONS

Here are several “after questions” we like, with follow-up language included. Choose the ones that are most relevant to the donor and the situation.

*Note:* When a donor says yes, offer a warm thank you and talk a little about how the gift will be meaningful to meeting the organization’s mission before continuing with the questions below.

- “How would you like to pay? Do you want to write a check now? Would you like us to send you a pledge statement in the mail? If you’re interested in our sustainer program, you can fulfill your pledge in automatic monthly installments.”
- “How do you want us to use this gift?” Check your notes from this meeting and all previous conversations with the donor. If you sense any indications that he or she wants to restrict his or her gift to a specific program or campaign, this is the time to clarify and honor that intent.
- “How would you like to be recognized? We publish donor names in our newsletter, our annual report, and on our website. We’d love to include your name so we can publicly express our thanks ... and your commitment will inspire other people to give. May we list your name, or would you prefer to be anonymous?” Check the spelling with the donor.
- “Do you want your gift to honor someone you care about? We can list their name, your name, or both.”
- “Tell me a little more about why you support our work. We’re always interested in what motivates our donors to give; this helps us reach out to other potential donors. You just made a very generous decision—I’d really appreciate knowing why.”
- “Would you be willing to give a testimonial we can use in our newsletter and other promotional materials? May we include your photo? Our most generous supporters —people like you—are our most credible advocates. May we have a sentence or two to inspire others?”

- “Would you be willing to join us at a board meeting and talk about why you support our work? It’s really helpful for the board to hear directly from donors—it reminds them why we do the work we do and why it’s important to ask people to contribute. It will inspire them to work harder in support of our mission. Would you share your experience with the board?”
- “How would you like to be kept informed about our work—and how often? Do you want a printed newsletter or do you prefer brief emails? Shall I phone you from time to time? Do you use social media like Facebook? Would you prefer to receive updates in person and, if so, how many times per year?”
- “When I come back to give you a progress report, would you be willing to include family members so they can learn about what your support makes possible?” If you’re cultivating donors for future gifts, especially planned gifts, this is an essential step.
- “Can you recommend other people we can talk to about a gift? Do you have friends or colleagues who might want to join you in supporting our work? Would you be willing to make an introduction—by phone, by email, or in person—or join me for the initial visit?”
- “Given your strong commitment to our work, would you consider volunteering to help us raise money? For example, would you be willing to come along when I meet with prospects and talk about why you give?”
- “What’s your personal giving calendar? Are you typically a once-a-year donor? Twice a year? If we have an urgent need, can we approach you again? What schedule works best for you?”

# After the Yes

## DONOR TRACKING FORM

Donor name(s) \_\_\_\_\_

Date of conversation \_\_\_\_\_

### Terms of gift and payment schedule

*Full payment now*

Check

Credit card Visa/MC/Amex # \_\_\_\_\_ Expiration \_\_\_\_/\_\_\_\_

Securities or other

Notes:

*Pledge*

Payments will be made

Once per year on \_\_\_\_\_ (date)

Twice per year on \_\_\_\_\_ and \_\_\_\_\_ (dates)

Four times per year on \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_, and \_\_\_\_\_ (dates)

Monthly

Notes:

### Use of gift

Unrestricted

Restricted to \_\_\_\_\_

Notes:

### 1. Recognition

Would like to be recognized in our publications (*confirm correct spelling of name*)

Would prefer to remain anonymous

Notes:

### 2. Honor or remember

Gift in honor of \_\_\_\_\_

Gift in memory of \_\_\_\_\_

Notes:

### 3. Why does the donor support our work?

**4. Willing to give written testimonial?**

Yes  No

Notes:

**5. Willing to talk with board about why he/she supports our work?**

Yes  No

Notes:

**6. Communication preferences – note top three in order of preference**

Personal meeting      How often? \_\_\_\_\_

Phone call              How often? \_\_\_\_\_

Email                      How often? \_\_\_\_\_

Social media              How often? \_\_\_\_\_

Newsletter                How often? \_\_\_\_\_

Personal note/letter      How often? \_\_\_\_\_

Website                    How often? \_\_\_\_\_

Other (describe)        How often? \_\_\_\_\_

**7. Willing to involve family members in future conversations?**

Yes  No

Notes:

**8. Prospect leads**

Name \_\_\_\_\_ Contact info \_\_\_\_\_

Name \_\_\_\_\_ Contact info \_\_\_\_\_

Name \_\_\_\_\_ Contact info \_\_\_\_\_

**9. Potential fundraising volunteer?**

Yes  No

Notes:

**10. Personal giving calendar**

Annual

Multi-year commitment; number of years \_\_\_\_\_

As needed; OK to ask more than once per year