

"The Ask"

Meeting with your prospect

The purpose of this role play is to help you:

1. Develop confidence and clarity in your "pitch" -- how you present your work
2. Develop empathy for the person on the other side of the relationship -- the prospective donor
3. Improve your listening skills

Dramatis personae (Shakespearean for "the parts to be played"):

1. **The asker (or solicitor).** A volunteer or staff member who helps with fundraising.
2. **The prospect.** A current or prospective donor who is known to the asker -- in other words, they have a direct personal relationship.
3. **The observer:** who gets to watch and comment (after the role play is over).

By the end of the exercise, everyone will have the opportunity to play all three roles.

Setting up the role play

The asker reviews the prospect list that he or she filled out earlier and chooses one person on the list. The asker then trains the prospect to "be" that person by describing the prospect's current level of knowledge and involvement with the organization.

For example, the asker might say, "I want you to be my Aunt Rita. She always talks to me about my work and seems very interested. She came to our open house event last year but has never given. I know she attends church, which makes me think she is charitable, and when I was at the theatre I saw her listed in the program as a \$250 donor."

Where to meet: You decide. Your options include the prospect's home or office, your home or office, or a neutral location (such as a restaurant).

Asker

Your goal is to:

1. Introduce the work of your organization.
2. By asking questions, find out what the prospect cares about and how your work might address his or her interests.
3. Encourage the prospect to agree to a next step; this could include:
 - a. Make a gift or a pledge.
 - b. Suggest other prospects.
 - c. Volunteer to help with program or fundraising needs.

Bonus points: show and tell (visual aids)

Prospect

Your goal is to:

1. Learn more about this group without spending a lot of time.
2. If you can, identify one aspect of the group, the project, or the presentation that grabs your attention.
3. Provide a few objections or obstacles for the solicitor to address.
4. Based on the conversation, decide if you will:
 - a. Contribute or pledge today.
 - b. Delay your decision ("I'd like to think about it.")
 - c. Decline to donate.
 - d. Become involved in some other way.

Bonus points: Unexpected distractions (phone calls, pagers, other people going in and out, etc.) are allowed.

Observer

Your goal is to:

1. Watch, listen, take notes, and be prepared to talk about what you see and hear.

Bonus points: Save your comments for the debriefing period.

Structure of the meeting (instructions for the asker)

1. Briefly build rapport with the prospect by discussing any mutual interests, friends, etc
2. Uncover the prospect's needs and interests. Why does he or she care about your issue or programs? If the prospect were to give, what would s/he want in return?
3. Make a brief presentation about your work, allowing the prospect to participate and ask questions.
4. Ask for the gift, naming a specific amount or a range. After "the ask," keep quiet and wait for the prospect to respond.
5. Deal with any concerns or objections.
6. Close the meeting by re-stating and clarifying any agreements or next steps.

To "debrief" this exercise

1. The asker goes first. S/he says *two things about the meeting that went well and one thing that could have worked better, with an idea for how to improve it.*
2. The prospect goes next, following the same format.
3. Finally, the observer offers comments, following the same format.

Timing: Each side of this triangle (role play plus debriefing) takes 15-20 minutes. Then all participants rotate to a new role. Total time: 45-60 minutes. The facilitator will keep track of the clock and announce when it's time to switch roles.