The Shephard Group
FRONTLINE FUNDRAISER
TRAINING ✦ COACHING ✦ CONSULTING

THE FOUR DECISIONS – HOW TO LEAD YOUR DONOR TO EACH

AN ONLINE PRIMER FOR MAJOR GIFT FUNDRAISERS

TRAINING GUIDE

Welcome to this e-learning version of **The Four Decisions -- How to Lead Your Donor to Each**.

If you are a director of development, a major gift officer, a planned giving director, even the executive director of a nonprofit organization, if your work puts you in direct contact with the few of your donors who give your organization the lion's share of its funding, this course is for you.

The course introduces you to a specific approach to asking for major individual gifts, and to a fundraising philosophy. You will learn the gift conversation from your donor's side of the coffee table.

You will learn how to plan and work intentionally, how to begin with the end in mind in each of your donor relationships.

You will discover why you should seek first to understand, then to be understood, in short, how to actively listen.

You will learn how to look for gift opportunities that benefit your nonprofit, your donor, and others about whom your donor cares – how to think win – win, how to keep your work Donor-Centered.

Each of the five lessons in the course offers multiple learning tools

- The lesson itself, which you play at your convenience during your enrollment period
- Printable attachments pertinent to each – tools for your ongoing use
- A knowledge assessment to help ensure your understanding of the materials
- Post-lesson assignments, to translate theory into action

Upon completion of this course you will be equipped with all the tools needed to succeed as a Frontline Fundraising professional, both on behalf of your organization and in support of each student's career goals.

Flexible Enrollment Options
One year: a bargain for the large shop with multiple new hires each year
90 days: cost-effective on-boarding for the new frontline fundraiser (see next page)
30 days: use to sharpen specific tools or to review select lessons, whether individually or in a group

THE FIRST 90 DAYS

Sample Training Plan to On-board a New Hire

Training Week #	Lesson & Assignments
1	Play Lesson 1. Begin Assignments
2	Complete Assignments for Lesson 1
3	Play Lesson 2. Begin Assignments
4	Complete Assignments for Lesson 2
5	Play Lesson 3. Begin Assignments
6	Complete Assignments for Lesson 3
7	Play Lesson 4. Begin Assignments
8	Complete Assignments for Lesson 4
9	Play Lesson 5. Begin Assignments
10	Complete Assignments for Lesson 5
11	Complete any outstanding assignments. Review lessons as you like.
12	Complete any outstanding assignments. Review lessons as you like.

With time considered for in-processing and unforeseen distractions, this entire course can be completed within 90 days of your new hire's arrival. Your 90 day enrollment covers nearly 13 weeks, offering ample time to adjust as priorities and circumstances dictate.

Your responsibility as a training manager is to schedule and assign lessons according to your preferred schedule, then make time to meet with students, either individually or in a group setting. Because the concepts, the knowledge assessment, and the suggested assignments are all included in the lesson, your pre-meeting preparation is mostly done for you.

All you need to do is:

- Assign the selected lesson(s) to your students.
- Review each lesson and any printable forms to familiarize yourself with content.
- Review the Knowledge Assessment with students to ensure they understood the lesson.
- Decide how you want to discuss the post-lesson Assignments. You can choose to skip any that don't suit you or fit your organization.

We welcome your ongoing feedback on your experience with ***The Four Decisions Online****. We want to apply what YOU learn to our updates on the course. Thank you for your input.*

THE FOUR DECISIONS ONLINE
COURSE CONTENTS

LESSON 1: THE FOUR DECISIONS

Play Time – 50 Minutes

Lesson Overview: This first lesson is divided into three parts. In Part One you're introduced to two articles that form the foundation of the course. You'll take a critical look at **The Self-Limiting Ask**, talk about why the status quo is unacceptable, and at **The Four Decisions – How to Lead Your Donor to Each.**

In Part Two you will learn how to use valuable tools in managing your portfolio of potential donors.

In Part Three You will learn how to work effectively with various Personality Types, how to adapt the methodology and language in the course to those with whom you're working.

Part 1 – The Four Decisions: This first part of the lesson prepares you to ask, but not necessarily for what you might be thinking, or in the way you might be used to doing it.

Learning Objectives

- You will learn how to address the dangers of the Self-Limiting Ask.
- You will learn The Four Decisions -- the gift conversation from the donor's side of the coffee table.

Printable Documents

- The Self-Limiting Ask
- The Four Decisions – How to Lead Your Donor to Each

Assignments

- Identify any annual donors of $1,000 or more with whom who you should initiate major gift conversations.
- Discuss with your manager the parallels between the traditional development/fundraising cycle and The Four Decisions.
- Discuss with your manager the distinctions between transactional and relational fundraising.
- Identify your top five potential donors and determine which of The Four Decisions you should pursue next with each one.

Part 2 – Manage Your Portfolio: This part of the lesson introduces you to two valuable tools to help you identify and prioritize those you hope to cultivate for major gifts.

Learning Objectives

- You will learn how to use the Identification and Rating Checklist.
- You will learn how to use the Prospect Rating Table.

Printable Documents

- Identification and Rating Checklist
- Prospect Rating Table

Assignments

- Learn what alpha/numeric system of rating Suspects, Prospects, and Donors your organization uses. Discuss with your manager how to apply that to your use of this form.

- Learn where in your data or filing system you will find notes of prior contacts and correspondence with Suspects, Prospects, and Donors.
- Discuss with your manger and/or information technology specialist how you can create an Identification and Rating Worksheet.
- Discuss with your manager the best way to integrate supervisory management requirements with your self-management standards.
- Discuss with your manger and/or information technology specialist where in your constituent management system you can record Prospect Ratings.

Part 3 – Personality Types: This part of the lesson offers tools to help you connect with the new acquaintances you will meet as you build donor relationships. Everyone has a world view, perspectives and opinions -- a personality. An understanding of personality types will equip you to successfully communicate with others in meaningful and effective ways.

Learning Objectives

- During this part of the lesson we will take a beginner's look at personality types – how to recognize what motivates others and how best to respond to them.
- You will learn the basics of how to identify and analyze personality types and how to use your analysis where it matters – as you build meaningful donor relationships.
- You will be encouraged to start by identifying your own personality type and considering how you will best relate to each of the other types identified in this part of the lesson.
- You will be provided two tools to help you identify, analyze, and proactively communicate with the various types of people you will meet in your work.

Printable Documents

- Overview of Personality Types
- Personality Types Checklist

Assignments

- Identify your top five potential donors and determine which of The Four Decisions you should pursue next with each.
- Identify yourself. What is your primary personality type? Do you have a secondary type? How you interact with various personality types is what's important.
- Classify your top five prospects/donors – primary and secondary personality types.
- Classify your manager; that interaction as equally important.
- Choose your names/labels for the personality types as you will adopt them.
- Begin a Personality Types Checklist for three new promising suspects and begin to use them in building those relationships. Discuss with your manager strategies and next steps for each and regularly monitor for at least three months.

LESSON 2: WHY

Play Time -- 60 Minutes

Lesson Overview: This lesson acknowledges that it's all but impossible to pursue a major gift until you actually meet with a new suspected donor and begin a conversation. Until you learn why they're willing to spend time with a fundraiser, why they care enough to even consider discussing giving with you, you aren't ready to discuss giving.

The lesson is divided into three parts. Part One – Get the Appointment -- addresses the first part of WHY – why your future donors care enough about your nonprofit to agree to meet with you in the first place, and what proactive steps you can take to ensure they do.

In Part Two you will pursue the second part of WHY, as you learn to take advantage of how you got the appointment, when it's time to get to the point during the discovery meeting and actually begin a new donor relationship.

In Part Three you'll learn how to respond to the concerns your future donors will express to you in ways that invite further discussion rather than just taking NO for an answer.

Part 1 – Get the Appointment: How you go about getting appointments will set you up for what you want to make happen once you're there, face to face with your new suspected donor. This part of the lesson addresses the first part of WHY – why the suspect might be willing to meet with you.

Learning Objectives

- You will learn how to intentionally invite meetings with suspected donors, how to claim control from the outset, how to set the agenda for what you hope will follow.
- You will learn how to invite meetings both in person and by telephone. You will be invited to draft your elevator speech for in-person conversations and your personal Call Scripts for telephoning.
- You will learn how to Go APE in anticipating, preparing for, and responding to concerns that will be shared with you.

Printable Documents

- Call Scripts
- Elevator Speech Template
- Go APE

Assignments

- Draft your basic, mission-oriented elevator speech, and at least one program-specific elevator speech. Work with management and with selected program directors, both to secure their input and to encourage them to embrace the elevator speeches as their own.
- Draft your basic call scripts, a version for your Suspect, one for the Gatekeeper, and one for Voicemail. Share them with your manager and test them on colleagues.
- For each of the expressed concerns listed below prepare your go-to response. Share them with your manager and colleagues. Suggest a training session using the GO APE template.
    - "I'm not interested."
    - "I'm busy. Just send me some literature."
    - "I can't afford to give right now."
    - "I'm upset about . . ."

Part 2 – Get to the Point: This part of the lesson addresses the second part of WHY – why your future donor might be interested in having a gift conversation with you as you get to the point.

Learning Objectives

- During this part of the lesson you will learn the value of beginning with the end in mind when developing a new donor relationship. You will be provided examples of ice-breaking questions and invitations you can use.
- You will gain a deeper understanding of the value of Part One of this lesson – Get the Appointment – as you learn how to set and pursue a purposeful agenda with your future donors
- You will examine the heart of the first of the four decisions you will pursue and discuss with those of your potential donors who finally say YES to your solicitations – WHY they should want to start those gift conversations with you.
- You will learn how to determine whether a suspect is worth continued engagement or should be disqualified.

Printable Documents

- Triggering Questions & Invitations

Assignments

- Discuss with your manager the similarities between major gift prospecting and sales. Identify shared and applicable techniques you can use in your work.
- Use the Triggering Questions & Invitations examples to create your own questions and invitations. Test them with colleagues, then with real suspected donors.

Part 3 – Respond to Concerns: This part of the lesson acknowledges that those from whom you invite contributions will sometimes say NO to your questions, invitations, and requests. This part of the lesson invites you to change your perspective as you hear, feel, and respond to NO, to stop thinking about how to overcome objections but about how to effectively respond to stated concerns.

Learning Objectives

- You will be introduced to a different way of looking at the negative responses you will receive from those with whom you work.
- You will be invited to embrace a new mindset about objections. You will learn that NO is not NO until it is clarified and qualified.
- You will be introduced to the Nine Fundraising NOs and the Three Fundraising Fears, and to ways you can successfully respond to each.

Printable Documents

The Nine Fundraising NOs
The Three Fundraising Fears

Assignments

- Discuss with your manager and colleagues the important distinctions between “overcoming objections” and “responding to concerns” and how your perspective can impact your relationship-building efforts.

- Discuss with your manager a recent experience with a prospect who said NO to your solicitation. Review your work with this person during assessment and cultivation to determine how positive signals ended in a negative decision. Identify which of the Four Decisions you need to focus on. Discuss what you can do better next time.
- Identify a regularly-scheduled staff meeting at which to spend a few minutes reviewing versions of NO you have heard. Discuss and brainstorm with colleagues. Make this a regular agenda item.

LESSON 3: WHAT

Play Time -- 30 Minutes

Lesson Overview: Once you establish WHY a possible donor might even consider discussing a gift it's time to proactively invite and start the actual gift discussion. Your biggest challenge in pursuing the four decisions with most future donors will be the transition from WHY to WHAT, your invitation to translate feelings into action, to start the actual gift conversation. This lesson introduces the conversation about WHAT impact the donor wants to have through the gift, where in your nonprofit the gift will be designated.

There are three parts to this lesson. In Part One you will learn how to package your funding priorities in a way you may share them with your future donors.

Part Two introduces you to the gift conversation you hope to have with every possible donor, and the conversation you will have with each on who decides to say YES.

Part Three takes a deep dive into the first part of that gift conversation, the conversation about what at your nonprofit the donor wants to support.

Part 1 – Package Your Priorities: This part of the lesson provides the tools and templates you will need to effectively present your funding priorities in a way you can confidently share with possible donors, to help them identify their WHAT.

Learning Objectives

- You will learn five important steps to take in packaging your priorities to share with suspected donors.
- You will be encouraged to fall in love with the organization you serve, with its mission and vision – to truly believe in it.
- You will be given samples of Case Statement Briefs you can refer to in drafting your own presentation materials, and which will better prepare you to brief your new suspected donors.
- You will be introduced to a methodology for determining gift amounts for naming physical spaces.

Printable Documents

- Program Support
- Faculty Support
- Space Naming Template
- Sponsorships
- Capital & Special Projects
- Endowed Funds Sample

Assignments

- What about your organization most excites you? Makes you proudest? Challenges you to seek support for it? Schedule time to articulate your feelings and dreams with: your manager, a senior colleague, a trusted constituent, a prospective donor.
- Ask your manager for copies of all pertinent organizational policies on gifts to name physical spaces and endowed funds.
- Find any current printed materials on your funding needs and priorities you can share with your suspects. If there are none invite a discussion of this lesson with your manager and other appropriate colleagues.
- Learn who in your organization can help write copy for your Case Statement Briefs and/or other materials to share with Suspects and Prospects.

Part 2 – The Two Part Conversation: This part of the lesson introduces you to a structured, deliberate approach to assessment with a new suspected donor, acknowledging the two parts of any successful major gift discussion.

Learning Objectives

- You will gain a clear understanding of the importance of transitioning from discussing WHY into an examination of WHAT at your nonprofit might most interest a potential donor, and HOW a gift plan might be structured.
- You will learn about the basic structure and language of the Two Part Conversation, the actual gift discussion you hope to have with your future donors.
- You will gain a deeper understanding of and appreciation for the value of working intentionally to pursue the key decisions you want your future donors to make.

Printable Documents

- The Two Part Conversation

Assignments for the Two Part Conversation are at the end of Lesson Four.

Part 3 – WHAT: This part of the lesson is focused on WHAT, the first part of the Two Part Gift Conversation. It shows how you can intentionally invite a conversation with your prospective donor about specific funding interests, to link their interests to your organization's funding priorities.

Learning Objectives

- You will learn how to transition from WHY your prospective donor cares about your nonprofit to WHAT that prospect might want to support with a gift, to actually start the gift conversation.
- You will learn the five possible choices a donor might make when consider WHAT.
- You will gain a greater sense of confidence in your ability to work deliberately when inviting the gift conversation.

No Printable Documents

Assignments

- Referring to the examples provided in the lesson, select your favorite way of transitioning the conversation from WHY your suspected donor cares about your nonprofit to the actual gift conversation. Discuss and practice with: your manager, a trusted colleague, a trusted constituent, a possible donor.

- Assignment: Select your top three – five prospective donors to invite for site visits to discuss WHAT giving priorities might most interest them. Make an action plan for each.

LESSON 4: HOW

Play Time -- 50 Minutes

Lesson Overview: This lesson introduces you to the third of the four decisions – HOW your future donors can best make the gifts they want to make -- when the gift might be made, with what assets, and in conjunction with what other considerations and priorities the donor will share with you.

The lesson is divided into three parts. Part One takes a deep dive into HOW a gift plan might be made, whether outright or deferred, whether with a cash gift from income or with identified assets. It addresses related taxation and personal concerns.

Part Two introduces the Assets Inventory, a valuable tool for identifying giftable assets and tax-related issues.

Part Three takes a much closer look at the Two Part Conversation, which was introduced in Lesson 3, putting WHAT and HOW together for truly effective major gift planning.

Part 1 – HOW: This part of the lesson on HOW introduces the four possible topics that might be discussed with your future donor when exploring HOW.

Learning Objectives

- You will gain an understanding of and appreciation for the value of pursuing gifts of assets over gifts from income.
- You will learn a proven technique for priming the pump with examples your prospect can respond to.
- You will be given tools to increase both your competence and your confidence in finding more and larger gifts than you might have thought possible.

No Printable Documents

Assignments

- Referring to the examples provided in the printable overview of The Two Part Conversation, select your favorite way of transitioning the conversation from WHY your suspected donor cares about your nonprofit to the actual gift conversation. Discuss and practice with your manager, a trusted colleague, a trusted constituent, a possible donor.

Part 2 – Assets Inventory: Most significant charitable gifts are not made from income, but from assets. This part of the lesson introduces you to a tool for collecting important information about giftable assets, the most valuable source of major charitable giving.

Learning Objectives

- You will learn a specific technique to invite discussion of assets and gift planning with a prospective donor.
- You will learn how to use the Assets Inventory form as a conversational aid in your gift discussions.
- You will gain a greater appreciation of the critical relationship between asset allocation and gift motivation.

Printable Documents

- Assets Inventory

Assignments

- Learn what version of an Assets Inventory your organization prefers to use. Discuss its use with your manager and with any gift planning expert available to you.
- Review your due diligence procedures for offered real estate gifts.

Part 3 – The Two Part Conversation Review: This part of the lesson offers a detailed look at the Two Part Conversation, and provides pointers on how to put the parts together in the only place it matters – in front of your future donors.

Learning Objectives

- You will learn how to guide the gift discussion with a prospective donor to specifically address gift motivation and gift structure.
- You will be provided several examples of proactive scripting to invite this Two Part Conversation.
- You will learn the Magic Answer to any question you might encounter during that conversation
- You will be given tools that will help you gain both competence and confidence in your major gift planning efforts.

Printable Documents

- Prime the Pump Exercise
- Find Your Voice Scripts
- Find Your Voice Exercise
- Exercise on HOW
- Income Tax Deductions

Assignments

- Complete the Find Your Voice exercise, available in printable documents. Share and discuss with your manager.
- Complete the Exercise on HOW, available in printable documents. Share and discuss with your manager.
- Select your favorite approach to the Two Part Conversation, personalize it, and practice it with colleagues. Then commit to testing it with the next suspected donor you visit.

LESSON 5: WILL YOU?

Play Time -- 35 Minutes

Lesson Overview: The fourth and final decision – WILL YOU? - is what you have been working toward – the opportunity, earned after an investment of time, energy, and expense, to finally solicit a gift decision. With good preparation and sharing your agenda with your future donor, it's often a formality. In fact, the gift will sometimes be offered before you can ask. Still, it should be approached with forethought and intention. This lesson introduces tools you can use to ensure you're as focused as possible on a successful culmination to the relationship.

Part 1 – Four Decisions Checklist: During this first part of the lesson you will learn how to use the Four Decisions Checklist as an effective way to collect and analyze information from your prospective donor as you work through the four decisions together.

Learning Objectives

- You will enhance your understanding of the value of using this dual-purpose tool in your work, for both data collection and for planning.

Printable Documents

- Four Decisions Checklist

Assignments

- Start a Four Decisions Checklist for at least three new possible donors during each of the next three months (nine total). Share them with your manager; update them as you build each relationship.

Part 2 – Pre-Proposal: This part of the lesson introduces a tool you can use to give your prospect the opportunity to self-identify level of interest and gift capacity.

Learning Objectives

- You will learn how to draft and use a pre-proposal document in a gift negotiation with a prospective donor.
- You will learn how to introduce and discuss multi-part gift planning conversations with your prospects.

Printable Documents

- Pre-Proposal Template
- Multi-Part Gift Strategy

Assignments

- Learn your organization's pertinent policies regarding how a multi-part gift plan interfaces with your naming opportunities, especially relative to deferred gift commitments.
- Work with your manager to design a template for a pre-proposal document.

Part 3 – Solicitation Checklist: This part of the lesson introduces you to a useful tool that will help prepare you for the most important moment in all your work as a frontline fundraiser – solicitation of a charitable gift.

Learning Objectives

- You will learn how to use a solicitation checklist to ensure you and any colleagues are fully prepared for the ask and for what will follow.
- You will be invited to visualize success as you reflect on all the pre-solicitation preparation that got you to this point, to reinforce your confidence .

Printable Documents

- Solicitation Checklist

Assignments

- Draft a pre-visit visualization statement that works for you.
- Learn from your manager whether your organization uses a particular format or template for formal proposals.