

DONOR QUESTIONS

TO DETERMINE PROPENSITY & CAPACITY

GOAL: Build relationships with your donors through conversations: visiting, asking questions, and listening. It's really important to listen well. Look for donors that have both propensity and capacity to give.

To hear Founder and CEO Eddie Thompson's podcast or read the transcript on this topic, visit www.ceplan.com/podcasts/donorcavityvspropensity.

Below are questions you can ask to discover a donor's propensity and capacity to give.

PROPENSITY QUESTIONS

- You enter their house and you might ask a question as you look at their office or home's walls. *"I see you love this artwork; can you tell me more about your collection?"*
- Or, you might look at pictures of family members and ask, *"Well, this is interesting, tell me about your family."* Begin by having that conversation, understanding who these people are, what drives them, what are their values?
- You might ask the question, *"How did you find this piece of art?"*
- Or, you might ask, *"Where was this picture taken?"* You're trying to uncover more about this person. You want to learn what they think about their children. Many people who are financially sound believe that their heirs simply don't need a large inheritance. They love their family, they feel like their children are on a good road, that they're capable and doing well financially. And, there are others who believe that their children should make themselves rather than parents give them resources or assets. You want to know that.
- *"What's the best business decision you've ever made?"*
- *"Why was it important?"*
- *"What is the best business decision you've ever made and why was it important?"*
- Follow-up with this question, this is a great question, *"What was the best personal decision you've ever made? And, why was it so important to your success?"* Learn their values, their philosophy, what they believe.
- *"What was the best philanthropic decision you ever made? And, what was its impact on others?"* Learn what their drive was, their motivation, what really gave them joy and pleasure in making that gift. Learn what difference they were trying to make in the lives of others, not just the organization they gave to, but how did they change someone's life?

- *"Why are you so generous? Why do you give so much away?"*
- The last question you could ask, with a follow-up question, *"You hear about our efforts as an organization, of all the things we do what is most important to you? Or, how would you rank the various things our organization does to help others?"* You want to engage them into thinking about what makes a difference.

CAPACITY QUESTIONS

- Begin by asking, *"How's business? How's it going with you? What's the latest in your business?"* Or, whatever it may be. *"How's retirement going? Have you found that transitioning to retirement from work life is easy or hard? How's that affected you?"*
- *"How's the economy affected you?"* Because how they perceive the economy has impacted them is a major impact on how and when they give.
- Get back to their roots, *"How did you decide on your career? What led you in the direction that you followed?"*
- *"What's the single best investment you ever made?"*

FOLLOW-UP QUESTIONS

- When someone makes a statement, ask *"Why?"* or *"How so?"* or *"Would you tell me more about that?"*
- Or, you might ask if there's a specific action, *"How'd that happen? How'd you feel about that?"*
- *"Are you ready to learn more?"* if they're talking about making a gift.
- *"Are you ready to take the next step?"* if they're considering a gift.

Keep propensity in your mind as you move forward with your donors. Let's go make a difference in people's lives!