



Engaged
Generosity

BE INTENTIONAL DURING PROSPECT VISITS

Prospect visits are most effective when they're purposeful, focused, and grounded in impact. This brief white paper shares practical, field-tested tips to help gift officers ask better questions, listen more deeply, and move relationships forward with intention.

Don't be tempted to be the expert

Know about the programs and projects you are raising money for but let the experts go into detail. Know enough to engage prospects for a visit and let the physicians, nurses and administrators share what impact could be made by gifts.



Be a philanthropy adviser—not a social visitor

Explain your role is to work with people in the community who want to help the hospital and Dr. X achieve our mission by making gifts. If you say you are visiting to “update them from the hospital” and spend too much time talking about family and hobbies, you will have a hard time shifting to the cultivation process. If they ask, “Is this about money,” say, “We do hope that you will consider a gift but if, when and how much you give is entirely up to you.”



Ask More Questions

Limit your talking in Benefactor/Prospect visits to 1/3 of the total time and share enough to engage them to visit the experts. If you talk less in the meetings with prospects, you have time to ask them more questions.



Ask Better Questions

Be sure to ask follow up questions, including: “How so?” or “Tell me more?” Also, ask for clarity on previous response, such as “the last time we met, you said X. Could you unpack that a bit for me?”

Reflect Their Style

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Prospects Need to Know the What Before the How Much

Lead with the impact that gifts can have on the programs that resonate with them. Then explain how to achieve that impact a gift would need to be \$X. If the prospect wants to give less, show them the reduced impact but still be grateful for their gift. Don't promise you can deliver the impact of the larger gift if they give less.



Don't Over-Cultivate

At each meeting with the prospect, you should summarize where you are on the journey to help them make an impact and have a logical next step they agree to. You should be able to close the gift (if the donor isn't waiting for a liquidity event) within five visits/meetings.



Don't Lead With Solutions Where There Are No Problems

You don't need to solve problems that the prospect doesn't express. For example, don't say, "Could you make a gift of \$100k, payable over five years?" Rather, ask for a \$100k gift to accomplish X impact. If the donor asks, "Do I have to pay it all at once?" answer, "What do you have in mind?" She may say, "Could I pay it over three years?" Now the hospital has the full gift in three, rather than five years.

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Advisers in Philanthropy