

# ASKING STRATEGIC QUESTIONS<sup>©</sup>

## For Organizations

### A Resource of The Osborne Group, Inc.

*People remember more of what they say, than what you say. People believe what they say, more than what we say. People enjoy conversations in which they speak the most. Therefore, it is our responsibility to elicit the case for support from our potential donors! We want them to tell US whatever we want them to REMEMBER.*

*Following is a list of sample questions to help you do just that. You can weave them into a variety of purposeful conversations or use in an interview. Structured for positive responses and for gaining specific information that will help you in your leadership and major gift work, each question has a different purpose. Together, they will help you probe for information, advance the relationship, answer all the “Rights,” and receive a joyful “yes,” to your request for increased engagement with your institution and/or a significant gift to one of your priorities.*

#### About Your Organization

1. What do you know about our mission, vision and work?
2. How do you feel about our mission, vision and work?
3. Why do you support us?
4. How well do you know our programs? Which ones? How did that come about?
5. What do you believe are the perceptions of our organization (nationally, in the community, region, state)?
6. What are your perceptions of our effectiveness?
7. Which aspects of our programs do you believe are our greatest strengths?
8. In what ways do you feel good about the gifts you make to us?
9. Do you believe your gifts to us are making a difference? If so how?
10. Do you feel we use your contributions wisely, that we are fiscally well managed?
11. Who do you know on our (Committee, Board)?
12. Who do you perceive are our chief philanthropic competitors?
13. What are your impressions of our publications? Which ones do you get, read, like?
14. Do you feel more informed about our mission, vision and work as a result of reading our publications? More informed about how your gifts are used? More informed about our priorities and plans for moving forward?
15. Have you attended any of our events? Which ones? How did that come about? What was your impression?
16. Do you have any particular concerns you would like me to share with our CEO, volunteer chairs, Board?
17. Do you feel you know our CEO and trust his/her leadership?
18. What are your impressions of our CEO? Why?
19. What are your impressions of our senior administration? Why?
20. Have you had an opportunity to (read, hear) our (vision for the future), (our strategic plan), (our bold ideas for future), (the benefits we see in this project)?
21. Have you had an opportunity to meet with any of the people we serve? Under what circumstances? What were your impressions?

#### Mission, Vision, Work and/or Project

1. What are your impressions of our vision for the future?
2. Do you believe we have a strong case for support? If so why? If not, why not?
3. To what extent do you believe (the mission we have, issues we're solving) are serious problems for our (community, state, region, country, world)?
4. In what ways do these (did these) issues impact you, your family, your neighbors, your beliefs, your values?
5. As you (read, heard) our vision for the future, in what ways do you see our organization effectively addressing these issues?
6. Are there other ways we could help solve this problem?
7. In what ways might you help us address these issues?
8. Are there any questions about our vision, mission, work, priorities that we've not answered?

## Personal and Lifestyle

1. (These questions should come from observations around the home or office, prior knowledge, etc.) What are the ages, names of your children? Grandchildren? Where do they live?
2. Do you get to see your children often? Grandchildren?
3. Have you had a chance to take some time off this year? If so, where did you go? If not, what would you like to do?
4. Do you enjoy entertaining in your home?
5. How's business? How is this economy affecting you? Your business?
6. How does the economy (your business situation) affect your philanthropic decisions?
7. What a beautiful piece of artwork, do you enjoy collecting?
8. In what ways do your personal interests impact your volunteer activities, philanthropic investments?

## Philanthropy and Giving Interests

1. What other organizations do you currently support? Volunteer for? Serve on the board of?
2. Which are your top three? Why is that?
3. Where is our organization on your list (if not among the top three)?
4. When you give, do you give both annually and to capital projects?
5. What capital gifts have you given that have given you pleasure?
6. How did it come about? What made it so pleasurable? Are you still involved with them?
7. Have you ever made a gift using a planned giving vehicle like a trust or annuity? How did that come about? Is that something that interests you? Do you feel knowledgeable about such vehicles? Would you like to know more?
8. Under what circumstances would you be willing to make a stretch, capital gift to a charity? To our organization?
9. Among our fund-raising priorities, which do you find the most compelling? Why? Least compelling? Why?
10. What factors go into your philanthropic decisions?
11. In my household my spouse and I make all of our giving decisions together, how does it work in your household?
12. How are decisions made at the foundation? Who is involved? What is the process?
13. Under what circumstances do you make exceptions to your (giving guidelines, average amount)?
14. I noticed (organization) received an extraordinary gift from your foundation, what made their request so compelling?
15. If that (some objection to getting involved or giving voiced prior to solicitation) was not an issue, in which of our priorities would you be interested?

## Involvement

1. How have you been involved with other organizations? What was that experience like?
2. As you think about the most satisfying volunteer experience you've had, what was key?
3. Would we very much like to have you involved with us and would like to find the right match for your skills and interests, may I share with you some opportunities that come to mind? What appeals to you? Why? (Why not?)
4. How can we get you more involved with us?
5. Would you be interested in helping us identify and engage others?
6. Would you be willing to review a list?
7. Who among your friends and acquaintances might be moved by our work?
8. What one piece of advice would you give us as we plan our future?
9. We would love for you to (insert involvement request here) is that something you would find of interest?
10. It is important to us that our donors and volunteers have satisfying experiences as they help us achieve our vision. How can we best help you, help us?
11. We would love for you to make a site visit, how can we make that happen?
12. Under what circumstances do members of the foundation board participate in (activity) of organizations with whom you have relationships?

## Attitude and Values Questions

1. How and why have you settled on your life's work?
2. What are the guiding principles that have helped you achieve in your business life? (Personal life?) (Philanthropic life?) (Volunteer life?)
3. What's the best business decision you've ever made? How so?
4. What's the best personal decision you've ever made? How so?

5. To what extent does our mission (vision, work) dovetail with your beliefs? How so?
6. If you could pass along a lesson to (your grandchildren) (the people you help with your philanthropy) (other organizations like us) what would that be?
7. What do you expect from the charitable organizations in which you are involved?
8. How have other organizations demonstrated to you the impact of your giving?
9. How do you like organizations to demonstrate their appreciation for gifts you have made?
10. If I could demonstrate to you the true impact of your philanthropy, would you prefer: something named for your or someone you love; meeting some of the people you have helped; hearing from some of the people you have helped; receiving a report on how your money has been spent; all of the above.

### **Testing the “Rights” and for Readiness, Closing and Commitment**

1. I remember you saying that (insert appropriate constituency) is important to you, is that right?
2. If I understand you correctly, what you’d like to see is (project, impact previously shared)?
3. As you think about making a real difference, what projects (priorities, programs, giving opportunities, naming opportunities) have the greatest appeal?
4. We would like to come and speak with you, over the next few weeks (days, months), about making an investment in our organization. Who should be a part of that conversation?
5. As you think about our organization’s ambitious goals for the future, which of our priorities do you think should be the most important? How would you rank the others?
6. As you know (insert priority) is a critical piece of our commitment to the nation (the world, etc...) is that something with which you agree?
7. Are we a part of your estate plans?
8. You’ve shared with me the tremendous impact you believe this project will have on the lives of the people we serve including (impact summary). Is that correct?
9. Then, may I suggest a next step of....?

### **Overcoming Objections or Soft Answers**

1. (Objection: “That’s a lot of money.”) It sounds like you’re wondering why we need that amount in order to get the impact we’ve discussed. Am I correct? The reason is....
2. (Objection: “We’re over committed.”) It sounds like you would like to invest in our organization, but right now you can’t see how you might do that. Am I right about that? Would it be helpful if I explained some of the ways others have managed this problem? They....
3. (Objection: “We don’t believe in giving to operating. It’s just a black hole.”) Perhaps you’d like to know specifically how your gift would be used. Would that address your concern? Here’s how unrestricted gifts make a powerful and specific impact on the people we serve...
4. (Soft answer: “Let me think about it and I’ll get back to you.”) What factors will you consider as you weigh our request?
5. (After objection is stated) “So, you’re concerned about (restate) is that correct? If that were not an issue, what would you like to accomplish with a gift to our organization”
6. (After objection is stated) “So, you’re concerned about (restate) is that correct? I remember the last time we met you said that it was very important to you that (what the gift would accomplish), has that changed for you?”

### **Follow-up Questions**

1. How so?
2. Can you clarify that?
3. Can you give me an example of what you mean?
4. Do you have any questions about what I just said?
5. What specific results are you looking for?
6. Can you say more about that?
7. Did I understand you correctly when you said...?
8. Did I answer your question?

9. How did that come about?
10. What did that mean to you and your family?
11. How do you feel about that?
12. How strongly do you feel about that?
13. What do you think about that?
14. What is most important to you?
15. Are we in agreement?
16. Are you ready to move forward?

*If you would like to learn more about Asking Strategic Questions and Listening for Intent, or any aspect of major gift work, fund development, management or institutional advancement, contact us at [www.theosbornegroup.com](http://www.theosbornegroup.com) or 914 428 7777 or send at email to [mail@theosbornegroup.com](mailto:mail@theosbornegroup.com)*

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