



Teach Board Members How to Get the Door Open to a Prospect *Without Being Pushy*

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I: Door opening process: Teach board members to “sneeze” and spread the word.

1. Step One: What you say:
 - a. Why do I care? (Mingle exercise explained at the end of this sheet)
 - b. What is the impact we make in the world (group discussion at tables – let the board members discuss it with each other, then debrief)

2. Step Two: How to “Be” when you say it.
 - a. Good energy vs. nervous energy (what kind of energy does it take to change the world?) Your energy is contagious!
 - b. Dark side of fundraising (when it is about money). You cannot be about “money” when you are opening the door to a conversation.

3. Step Three: How to start a conversation with your prospect.
 - a. How to have an advice visit: “what are your impressions?”
 - b. Donors expect to do the talking.

c. It is only when you let the other person talk that you'll engage them.

4. Step Four: How to invite your prospect for a follow-up experience.

a. What kind of follow-up steps could we take? (Group conversation at tables, let the board members come up with the steps)

II. What are we raising money for? (panel discussion with a facilitator)

Objectives:

- Help board members understand more about finances.
- When they really understand what is needed, often they are running out the door to find the support.
- It helps them re-frame fundraising away from “money” and into the more generous space of “helping people.”

Set up: bring your ED and perhaps a program person up to the front of the room, and settle down comfortably in chairs, like Oprah. Try to encourage a discussion:

1. How much is our budget?
2. Where does it all come from?
3. What difference do our private contributions make?
4. Why does our work cost so much?
5. Where does the money exactly go?
6. Take one program and drill down
7. What do we need that we don't have today?
8. If we had another \$100k what would we do with it?

III. Wouldn't it be wonderful if?

Objectives: More messaging training, but this time, it is at the very highest vision level. What would the world be like if we can help more people?

Set up: Ask board members to turn to the person next to them and complete this sentence. Then ask various board members to stand up and share their “Vision Statement” with the rest of the board.

IV. VIP Prospect game

Objective: This introduces board members to Prospect Identification and Cultivation without scaring them off.

1. Ask the board members to take out a sheet of paper.
2. They do NOT have to turn this paper in to anyone.
3. Ask them to see if they can come up with the names of 5-10 major prospects/donors who could catapult their organization’s financial future.
4. Give them a few minutes, then ask them to turn to the person next to them and discuss one of the names on either one of their sheets.
5. Ask for anyone who wants to volunteer to serve on a VIP Prospect Task Force to work with the development staff and develop/refine a prospect list.

How to Set Up The Elevator Speech Exercise

Part of every board member's training needs to be their own personal elevator speech.

Ask board members to share why they care.

That's an impact statement at the highest level. It's something they carry with them wherever they go. And they always know that story. Because it's deep in their hearts.

Multiple objectives in this exercise:

Not only does this give board members training and practice in an important skill, but it also:

- Gets the board members talking to each other.
- Wakes up their passion and energy, and engages them in the cause.
- Reconnects them with the reason they are taking the time out of their busy lives to serve on the board.
- Builds a sense of camaraderie and closeness among the board members.
- Adds some fun to their experience as board members.
- Boosts their morale, and sets them up to take action.

Best yet, it is a team-building exercise, too. Ask them this simple question:

“Why do you personally care about our organization?”

It's a pretty unusual question because board members don't often get a chance to talk about why they care. They are too busy doing business and being efficient. We rarely ask them about their OWN story.

This exercise helps them get back in touch with that deep caring they have in their hearts for your cause. Here's how to set up this most important conversation so that no one is self-conscious or feels put on the spot.

It's a casual **“mingle exercise.”**

Board members just mingle around the room and share their own perspective with other trustees.

How to set this exercise up:

1. Ask your board members what they would say if someone asked them why they cared enough to serve on this board.
2. Give them a few moments to write down some notes to themselves – what would they really say if given the chance?

3. Then tell them in just a minute we will ask everyone in the room to get up out of their chairs, find a partner, and share these thoughts with FOUR other board members.
4. Explain the exercise:
 - You'll find a partner.
 - Introduce yourself in case they may not know you well.
 - Then share your story.
 - Each person should take about 30 seconds.
 - I'll keep time and call out "Change partners!" when it's time to find another partner.
5. Then launch them: "Everybody up!" Have them stand up, find someone to talk to, and share their perspective briefly with four other board members, one after the other.

How to debrief when everyone is finished:

- What was your experience like? Let different people talk.
- What were they saying?
- How were they being?
- Was it easy or difficult?
- Was it fun or awful?
- What did you learn from other board members?

People love this exercise for so many reasons.

It's informal. It's fun. And it's remarkably productive on multiple levels.

When the board members talk repeatedly about what sparks their enthusiasm for your organization's work, they are re-igniting their own passion as they speak.

The board members also learn from other board members. They get great energy from the other folks in the room; and they enjoy themselves.

When you do this exercise, you'll be surprised by the excitement and fun that it generates. You'll see people laughing and smiling.

AND it's the best morale booster you can come up with ! When they are re-inspired by their own passion for the cause, board members are now ready to go to work.

Because they get back in touch with the deeper issue of why they care, then they are much more ready to tackle the work at hand with vigor - and commitment.

I'll bet that if you do this before a meeting, you'll find that it's one of the best meetings you've ever had with this group. That's what my fundraising friends tell me!