Ah, the day has finally arrived. You've carefully cultivated a new prospect over the past several months, and your relationship is at the stage when you officially ask the prospect for a donation.

It can be intimidating and nerve-wracking to sit across a table from someone and say a variation of, "Excuse me, would you mind donating $12,000 to our organization?"

Even with a prospect whom you know well and who is connected to your cause, solicitation has its challenges. The process gets easier with time, partly from experience and partly because you'll develop best practices as you learn.
To get ahead of the curve, use these five major gift solicitation secrets from the start.

You will customize your process as you continue making asks, but it's always nice to begin with a plan and an idea of what is required of you and your fellow fundraisers.

1. Map Out a General Outline of How the Conversation Will Go

Scripts are handy. In the nonprofit world, resources are limited and efforts are all hands on deck. You often rely on people to fill roles that they're unfamiliar with. That's when scripts become so crucial.

That script acts as a conversation safety net and provides quality assurance. A script can do the same thing for your major gift solicitation.

Now, you might be able to get away with a word-for-word script over the phone, but that won't work in person. For major gift solicitations, instead of a script, use an outline. It will have the same purpose as a script but will keep the authenticity of a free-flowing conversation intact.

Even if you never end up looking at the outline during the proposal, simply the act of putting a plan on paper will ease your nerves and help you prepare.

Additionally, if your major gift solicitation involves multiple representatives of your nonprofit, the outline will ensure that the whole team knows what is expected.

The formality of your presentation will be guided by the kind of relationship you've developed with the prospect, but even if the ask is more casual, you have a higher likelihood of securing a gift when you demonstrate competence and confidence.
You don't want a qualified prospect to hesitate because your team mixed up who does what during the presentation. Mishaps like that reflect poorly and can unfortunately hinder your ability to secure the major gift.

With an outline, everyone knows their role, and your presentation will run like a well-oiled machine.

2. Show the Prospect That You Know Him or Her

Major gift donors are a big deal, and they have to be treated as such. You certainly don't want to mix up a major gift donor's name or use the wrong salutation. They say the devil is in the details. Remember that so your nonprofit doesn't slip up when it comes to personalizing an ask of this magnitude.

Donors appreciate the little things that prove that your fundraisers have been listening and paying attention during their past experiences with your nonprofit.

You can ensure that your team shows major giving prospects just how well they know them by:

Let's look at those points one at a time.

Prospect research uncovers your major gifts prospects, and it also provides plenty of additional insights into the prospects' contact details, biographical information, business affiliations, and many more valuable details.

With that kind of knowledge, your major gift team knows, for example, that Ms. Smith is now Mrs. Jordan or that Janet Jacobs is a good friend of one of your board members.

Recording the former detail ensures that your team doesn't send a major gift proposal that incorrectly addresses the prospect, while the latter detail implies that having that specific board member involved
in the solicitation process might make Janet Jacobs more likely to donate.

A prominent component of the major gift cultivation process is building relationships with prospects. Major gift prospects need to get to know your organization and your mission before they commit to leaving a sizable gift, and your organization needs to get to know your major gift prospects in order to make the right kinds of asks.

During cultivation, your fundraisers spend a good amount of time conversing with and meeting with the major gift prospect. Track all interactions in your CRM to ensure that the ask itself is coming from the most well-informed angle possible.

3. Come with a Specific Ask Amount in Mind and Backups to Account for New Information You Learn

To secure a gift you have to ask for the gift. That's fundraising 101. In the case of major gift solicitation in particular, the intimidation of making a direct ask leads fundraisers to talk around the action instead of just flat out saying, "Would you be interested in donating X amount to fund Y?"

Physically stating the ask is a bridge easier crossed when you have a specific dollar amount in mind. Using giving calculations and formulas combined with the knowledge you gained during the cultivation process, your team should be able to determine a good, specific starting number.

There's a fear that asking for too much will turn the donor away, which it can. However, asking too little is just as relevant of an issue. It is more common than not that a fundraiser will leave a meeting, gift secured, and recognize that his ask was too low. Trust your research and instincts when crafting a number and don't let discomfort with asking for a lot of money cloud your judgment.
On a similar note, you also want to ensure that your ask amount is adaptable depending on the situation at hand and how the donor responds to your initial number. Be prepared to do more than just lower the number.

You want to:

Essentially, your preparations should allow you to pivot if need be. At this point in the process, you know the prospect well enough that you can take the ask in a new direction if your first effort hits a roadblock.

4. Engage the Prospect in a True Dialogue

Part of being able to adapt during the ask is engaging the prospect in a true dialogue.

It is easy to slip into default pitch mode. You get to talking about your organization and 15 minutes later, after your spiel, the prospect's eyes have glazed over and you realize you have basically been talking to yourself.

Your solicitation will have a much bigger impact if you make it a conversation.

Talk to prospects about their:

Let their responses frame your conversation.

Successful solicitations should be donor-centric, because, at the end of the day, this process is all about the donors.

If major giving donor solicitation is a car, the fundraisers might be driving, but the donors are the navigators. You can't leave the parking lot without their directions.
5. Be Ready for the Next Steps

In coordinating a major gifts effort, you'll need to be ready for what comes next after the prospect agrees to make a donation.

Your fundraisers making the ask should know what to do in the immediate aftermath, as well as how to follow-up. A major gift donor might write your organization a check on the spot, but there's also a strong chance that the donor will take alternative route.

Think about how the scenario changes if the donor has decided to split up a $150,000 donation across five years. What does your team do next?

As your staff works through the solicitation process, the steps after an accepted ask lead to the receipt of the donation itself. Soon after, the donor is added to your stewardship program.

Much of the discussion surrounding major gifts solicitation is about the moments leading up to the big question and how you handle that ask, but there's also the transition stage from ask to stewardship. How you go about handling that process can affect the way your brand new donor sees your organization and thinks about leaving future gifts.

Take these five major gifts solicitation strategies into account and confidently move forward with your program. The more asks your team makes, the better they'll get at the process. Pretty soon, your list of strategies will become highly customized and expand far beyond these five.