



# The Lucrative Art of Great Discovery

A step by step guide to quickly build  
rapport & make the most of every  
moment with your donor

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IF WE WANT DONORS TO UNDERSTAND US WE HAVE TO START BY UNDERSTANDING THEM. DONORS GIVE FOR THEIR REASONS, NOT OURS. DOING GREAT DISCOVERY DRAMATICALLY DEEPENS DONOR RELATIONSHIPS AND SETS UP A SUCCESSFUL ASK.

## HOW TO APPROACH DISCOVERY

Discovery centers on humans favorite subject – ourselves! Statistically, people spend 60% of conversations talking about themselves. Aim to talk 25% and listen 75% of the time. Your goal here is twofold: to find out what matters to them and build your relationship. You are creating interest and value by asking questions that engage the donor. Find a topic that is interesting to them, build rapport and start probing.



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**Fact: Every visit is a discovery visit!**

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## DO YOUR HOMEWORK BEFORE THE VISIT

Is it intrusive to try to learn more about your donors before you meet with them? No, it's called being prepared! You wouldn't show up for a job interview without researching the company ahead of time, don't make the same mistake with a donor. Researching their professional career, key accomplishments, academic background, and personal passions shows respect and interest in the donor. It will also allow you to quickly build rapport, find linkages and make the most every moment with your donor. Philanthropists and business leaders are busy people. Put them in the position of having to educate you about their life's work and you run the risk of offending them deeply. A quick LinkedIn and/or Google search can reveal a lot about a donor. You can also look them up or



follow them on open social media platforms like Twitter, Instagram, Facebook, and Pinterest. This kind of quick research might reveal interesting conversation points you want to bring up, shared values or linkages between the donor and your organization or you and the donor.

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**“I pay attention to what interests me and what interests me most is me. Ask anyone.” Tom Ahern**

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Be tactful and use your research as a conversation starter, i.e. “What positive ways has being involved in your \_\_\_\_ (alma mater, church, community group etc.) impacted you?” “Running a company

and having little ones must keep you busy! How do you juggle career and parenting?” “How’d you go from an English major to CEO?” “Did you always know you wanted to be... (in politics/in technology/ an entrepreneur/in medicine?”

## WHAT TO SAY TO GET THE MEETING

- » “Every donor has a story to tell...I want to know yours.”
- » “I want to show you how your gift is making a difference.”
- » “I want your input on a project we’re planning.”
- » “Part of my job is to get to know our loyal friends.”
- » “We are trying to figure out a way to do xxx. I’d love your input!

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**“I have no special talent. I am only passionately curious.” Albert Einstein**

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“We don’t convince donors. We help them realize they already care.” Marc Koeing

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## WHAT SOFT SKILLS CAN HELP?

Exude positive energy. Smile throughout the conversation, whether you are on the phone or in person. Maintain eye contact. Express a genuine interest in them. Share sincere compliments. Begin with small talk, i.e. “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?”. If you are visiting in person be conscious of your body language. You should have open body language – arms outstretched (not folded in front of you), legs uncrossed, feet pointed towards the donor. If you have materials with you put them down so they don’t create a physical barrier between you and the donor.

## WHAT IS THE FIRST QUESTION I SHOULD ASK?

Start by asking the donor permission to ask questions. This shows respect for the donor, the topic and how you are using their time. You don’t want this to feel like the Spanish Inquisition. For example...”Do you mind if I ask you a question? Well, I’d love to get to know you better and learn more about your interests. Would you mind telling me more about the causes important to you?”



# WHAT IF THE DONOR SEEMS SURPRISED TO HEAR FROM ME?

That's ok! These donors may have been neglected by your organization. They may not remember they are a donor. Reassure the donor you are only calling to thank them for their gift, learn more about what inspired them to give so generously to your organization and find out if they have any feedback, thoughts or ideas on how you can make their experience more positive and/or get them involved.

## 25 OPEN-ENDED "BEST-OF" DISCOVERY QUESTIONS TO ASK A DONOR

1. What inspired your first gift?
2. What causes are you most passionate about?
3. Which do you wish you had more of...time or money?  
What would you do with it if you got it?
4. What makes you happy despite anything?
5. What do you hope to achieve with your philanthropy?
6. How do you like to be invited to make a gift?
7. Why does our cause matter to you?
8. What do you love about what you do?



9. What is something new you'd like to try or learn?
10. What mistake or failure in your life taught you the most?
11. What was the hardest choice you ever had to make?
12. What was the best gift you ever gave and why?
13. Which of the organizations that you support does the best job of keeping you involved? How?
14. Do you have any feedback for us?
15. Is there any way we can make your experience more positive?
16. How can we get you more involved? May I invite you to \_\_\_\_? Can I introduce you to \_\_\_\_?
17. What values do you hold most dear?
18. If every job paid the same what would you do for a living?
19. Who inspires you?
20. Who would you most like to swap places with for a day?
21. If you could have dinner with anyone, living or dead, who would it be?
22. Describe what a perfect day would look like.
23. What legacy do you most want your giving to have?
24. Are there particular programs or areas that interest you?
25. As you think about the future of our work, what are some of your worries?  
What are your hopes?



# WHAT IS THE BIGGEST MISTAKE FUNDRAISERS MAKE ON A VISIT?

Talking too much about the organization and its accomplishments! “The donor is more interested in the good she can do the organization than in the good the organization has done.” Steven Screen.

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“Talk too much about how wonderful things are since your organization got involved and you leave out the problems your donors can solve.” Jeff Brooks

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## ARE THERE ANY QUESTIONS THAT ARE OFF LIMITS?

Steer clear of politically charged topics outside of your mission, especially if you suspect you and your donor might disagree. Always ask open-ended questions. Start with simple ones that are easy to answer before you progress to deeper ones. Every second counts with your donor, so be strategic!

## WHAT SHOULD I DO WITH ALL THE INSIGHT I LEARNED FROM MY DONOR(S)?

You spent a lot of time and effort finding out about your donors. Make sure others can access these insights too! Record the details of your conversation and their answers in your donor database. Your donor does not want to have to repeat the answers to these questions again in a year when the gift officer has a new portfolio or has left the organization. Keeping good records of your discovery helps keep staff attrition from causing donor attrition.





## ABOUT RACHEL MUIR, CFRE

Rachel has worked every side of the Rubik's cube that is the nonprofit sector. When she was 26 Rachel Muir launched Girlstart, a non-profit empowering girls in math, science, engineering and technology in the living room of her apartment with \$500 and a credit card. Several years later she had raised over 10 million and was featured on Oprah, CNN, and the Today show. Today Rachel delivers keynotes, custom trainings and board retreats that transform people into confident, successful fundraisers. Learn more about Rachel at [www.rachelmuir.com](http://www.rachelmuir.com)



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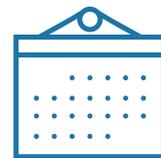
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## ABOUT BLOOMERANG

Bloomerang helps nonprofit organizations to reach, engage and retain the advocates they depend on to achieve their vision for a better world. Our cloud-based donor management software is rooted in principles of philanthropy, simple to use and focused on empowering your team to achieve remarkable results through enhanced donor loyalty. Learn more about Bloomerang at [bloomerang.co](https://bloomerang.co)

