



SYMPHONY
SERVICES
INTERNATIONAL

Making the Easy Look Hard

GETTING TO AND MAKING THE ASK

Symphony Services International
Professional Development Tour

November 2011

Agenda – 2 hours

- ▶ **Overture (Welcome and Introductions) (10 minutes)**
- ▶ **Movement I (Activation) (20 minutes)**
- ▶ **Movement II (Dialogue) (15 minutes)**
- ▶ **Movement III (Lecture) (15 minutes)**
- ▶ **Cadenza (Practice) (45 minutes)**
- ▶ **Finale & Coda (Close and benediction) (5 minutes)**

Who am I?

- ▶ Welcome and introductions (10 minutes)
 - Paul Hogle
 - Executive Vice President
 - Detroit Symphony Orchestra
 - You
 - Introduce yourselves to those around you
 - Name, orchestra, position
 - Describe the circumstances around the first time you heard an orchestra live



Let's get going!

Activation (20 minutes)

“I'm writing a news story about your orchestra's fundraising prowess. What would the headline be?”

- Each person write a headline
- At your table, share with one another / be prepared to share



Say what?

- ▶ Dialogue (15 minutes)
 - *“In your experience, what are the requirements of successfully getting to and making a fundraising solicitation?”*
 - Discuss
 - Chart
 - Paul: present and clarify *his* top-ten list

Paul Top Ten

- ▶ Pursue credible prospects
- ▶ Send the right person
- ▶ Send the right person at the right time
- ▶ Send the right person at the right time and ask for the right amount
- ▶ Send the right person at the right time; ask for the right amount for the right gift purpose
- ▶ Develop a written prospect strategy
- ▶ Script the phone call to request the meeting as well as the meeting itself
- ▶ Be clear about your pitch – mission, goals, impact, and metrics
- ▶ Listen more than talk
- ▶ Ask for a specific amount

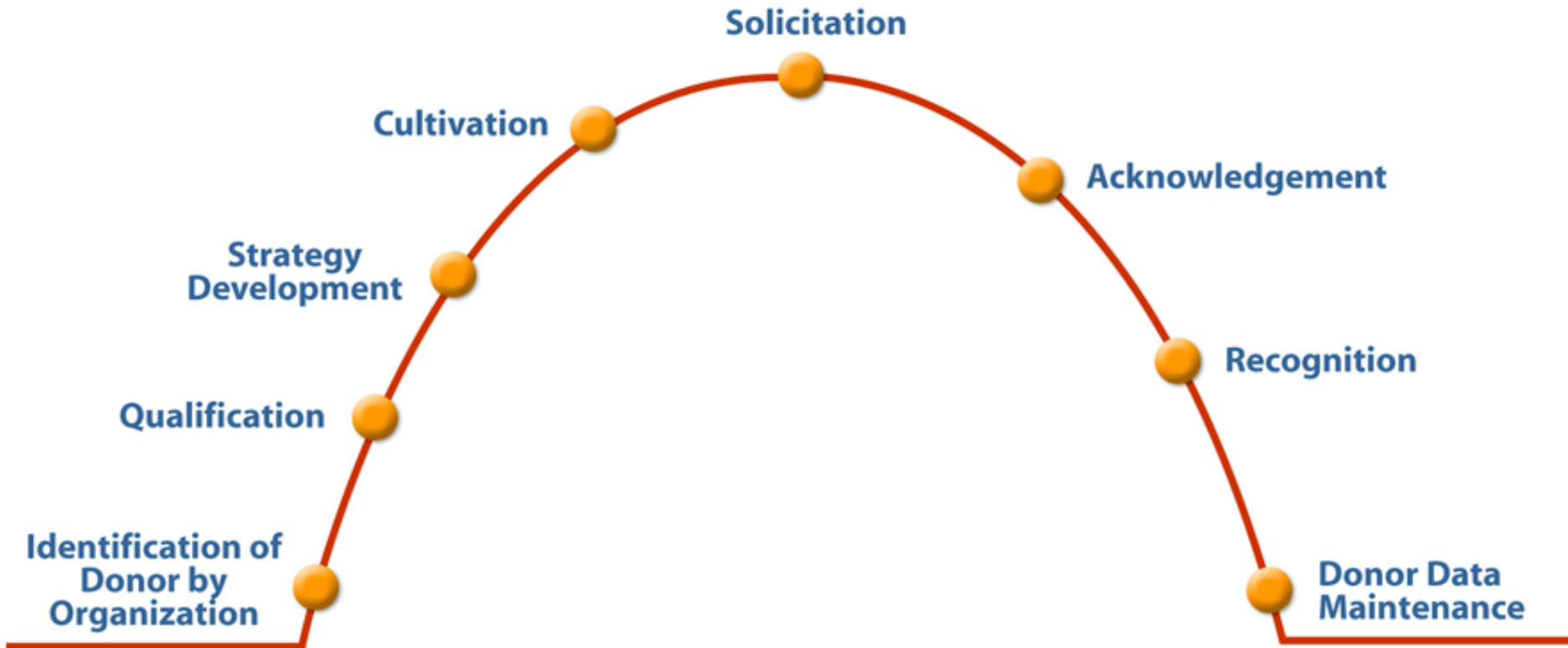
Getting to and making the ask

Listen Up!

- ▶ Lecture (10 minutes)
 - A sequential outline of the mechanics



Transactional Bell Curve: Getting to Ask



Credit:
High Impact Philanthropy
Kay Sprinkel Grace, Alan Wendroff

Paul's Phive Premises

- ▶ 5 Ways to engage a prospective donor
 - Cold call
 - Leveraged introduction
 - Informational interview
 - Gathering of the like-minded
 - Planned serendipity



Perfect practice make perfect

- ▶ Practice (45 minutes)
 - There are two sets of concept cards
 1. one set outlines different prospect types (Board member, foundation officer, corporate CEO, etc)
 2. another set outlines different orchestra funding needs
 - Your table has a card (the “Funding” tables have 2)
 - Discuss what the card(s) says and either plan for soliciting someone or being solicited
 - Pick a table “Volunteer” – one from each set; they will role play the situation out
 - Commentary from the group as well as from Paul

Constructive Commentary

- ▶ Was the solicitation successful?
 - Why or why not?
- ▶ What did we learn from the “visit?”
 - From the prospect? From the Orchestra?
- ▶ How is this “call” similar to calls you’ve been on
- ▶ What are your take-away learnings?

Close and benediction

- ▶ What have we heard?
- ▶ What have we learned?
- ▶ How can you apply?
- ▶ Charge...

