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Think Differently - Why?

**“We become what we think about!”**

Earl Nightingale, The Strangest Secret

Marcy Heim, The Artful Asker, 608-772-6777, marcy@marcyheim.com

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**FEAR THOUGHTS**

- ❖ What if they say “no” and I’m embarrassed?
- ❖ What if they don’t like my project, my mission?
- ❖ It’s not a good time now.
- ❖ Saying no to me is like saying I’m not a good person. What if they don’t like me after I ask?
- ❖ There is a lot to know about complex gifts.
- ❖ People don’t like to talk about money, faith, etc.
- ❖ What if I say the wrong thing...today’s world...

Marcy Heim, The Artful Asker, 608-772-6777, marcy@marcyheim.com

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**What are you THINKING?**

\*People know I am just looking for the money.  
I really want my giver to experience joy from her giving.

\*I need to tell them what we do.  
Ask their impressions of your programs and impact. Listen.

\*(Box checked) Have someone call me. Oh man, this is someone with a complaint.  
Oh good! I can’t wait to hear what they have to say.

\*I have to call to make appointments. UGH!  
People Love to Give Me Money

\*I sent them an email and they didn’t respond. Why can’t people answer my email? Why don’t they call back?  
How can I make it easier for them to get in touch?

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*"If you change the way  
you look at things, the  
things you look at  
change. ..."*  
Wayne Dyer

Renee Thompson, "Every time I'm talking to a donor I'm  
helping them realize they have permission to give what  
brings them joy."

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**Attract Abundance!**

**What are  
YOU thinking  
about wealth  
and Money?**

What have  
you heard  
about money  
growing up?

Attract Abundance!  
Either/Or

**PEOPLE LOVE TO GIVE ME MONEY!**

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**Let's sing!**

**People love to Give me Money  
To Make a Difference  
People love to Give me Money  
I'm the link to their investment**

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Never Forget!

“It’s not about the money, it’s about what the money does. Really does.”  
Marcy Heim

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Philanthropy - A Definition

Philanthropy is the Mystical Mingling of a Joyful Giver, An Artful Asker and a Grateful Recipient.

Doug Lawson

Marcy Heim, The Artful Asker, 608-772-6777, marcy@marcyheim.com

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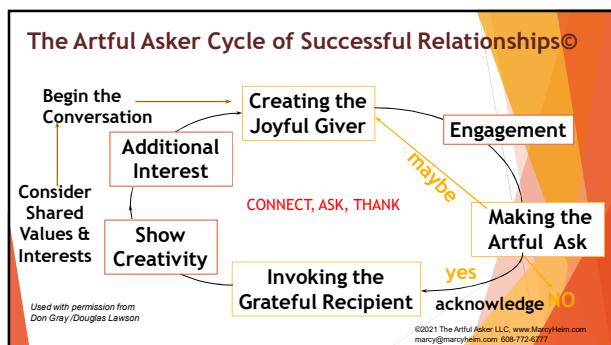
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Get CLEAR on EVERYONE's ROLE

A confused donor doesn't give, a confused fundraiser doesn't ask, a confused board member/volunteer doesn't help.

—Marcy Heim

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What's important Now? Phillip Stutt Research

PERSONAL VALUES

Q41 Of the values that you indicated to be important, which influence your decisions the most?

Helping and caring for family and friends	13.09%
Preserving your own safety and the safety of your family	15.05%
Being dependable and trustworthy for family and friends	11.59%
Having a safe and stable community and nation	8.78%
Treating every person in the world equally and justly	7.54%
Being free to determine your own actions	7.02%
Enjoying the pleasures of life	5.20%
Caring for nature and protecting the environment	5.20%
Being humble and modest	5.19%
Preserving family, cultural or religious traditions and customs	4.74%
Understanding and accepting people who are different from you	3.98%
Putting obligations and duties aside	3.73%
Being free to think up new ideas, try new methods and to develop new skills	3.48%
Avoiding spending on harming people	2.48%
Having a life full of excitement, novelty and challenges	1.88%
Acquiring wealth, status and influence	1.18%
Maintaining a good public image and being treated with respect and	0.88%
Being successful and admired for your achievements	0.71%
Being in charge and directing people	0.20%

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ASK for anything Artfully

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**Rehearse/Role-play**

- ▶ WRITE OUT the ask
- ▶ Practice the ask
- ▶ Define roles of team members and role-play the call

- bestow sincere honor/praise
- special Connection/pride with organization and to this ask
- be *considerate*; ask for consideration
- state specific amount
- state specific purpose
- Be quiet

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**Marcy's 3-Sentence Ask©**

Name \_\_\_\_\_

**You have (Why ME?)**  
(compliment, service, giving)

**You understand (Why THIS?)**  
(special connection to this request)

**Would you consider a gift of \_\_\_\_ (What?)**  
for/to \_\_\_\_\_. Then QUIET

**Marcy's 3-sentence Artful Ask**  
17words  
max/sentence

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**ASK** for anything  
*Artfully*

SAMPLE ASKS WILL BE SHARED IN THE SESSION

Marcy Heim, The Artful Asker, 608-772-6777, [marcy@marcyheim.com](mailto:marcy@marcyheim.com)

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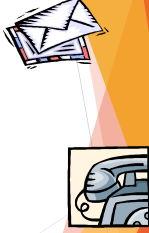
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**Tips in Asking**

- Your ask may spark questions to resolve before the yes
- Plan ahead for following up
- Establish the next step
- Be considerate, thank the person, be grateful



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**What are the Common Pitfalls in Making the Ask?**

- ▶ Talk too much - never ask!
- ▶ Ask sounds cold or inconsiderate
- ▶ Say "should" and "ought"
- ▶ We ask apologetically and are embarrassed
- ▶ Eye contact breaks down
- ▶ The ask is rushed
- ▶ We break the silence too soon after ask is made



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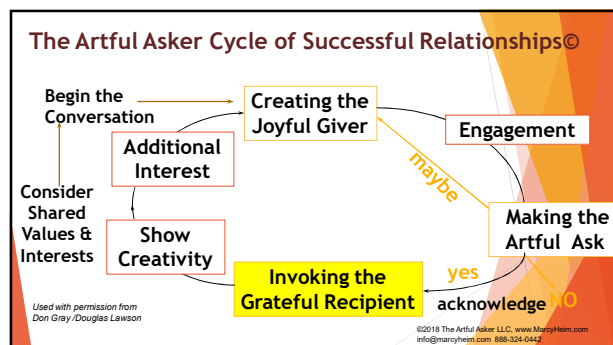
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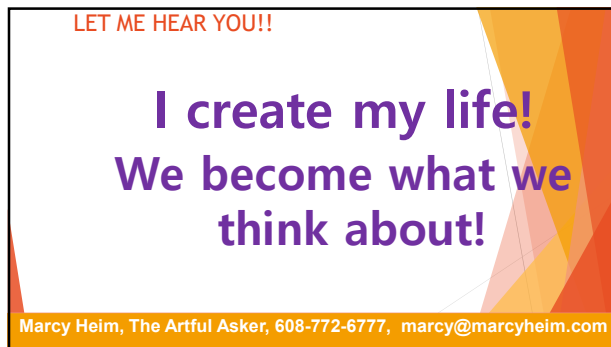
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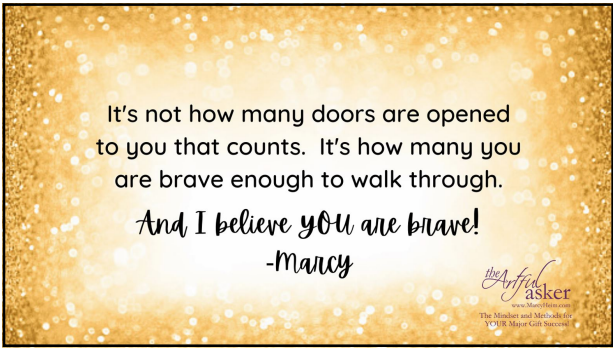
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# PRACTICAL PLANNED GIVING CONFERENCE SPEAKER EVALUATION

Date: \_\_\_\_\_ Speaker: \_\_\_\_\_

Name (optional): \_\_\_\_\_

Please rate the following:

	Excellent	Good	Neutral	Fair	Poor
<b>I. OVERALL</b>	5	4	3	2	1
Were your major objectives for this session met? Was the content of the session vital, timely, substantive?					
Comments: _____					
_____					
_____					

<b>II. RELEVANCE</b>	5	4	3	2	1
Was the subject matter directly related to the requirements of your job?					
Comments: _____					
_____					
_____					

<b>III. VALUE</b>	5	4	3	2	1
Do you believe the benefits of this session were worth the time, effort and cost?					
Comments: _____					
_____					
_____					

<b>IV. SPEAKER</b>	5	4	3	2	1
How was their presentation style? Did the session move along at the right pace? Did they have appropriate knowledge on the topic?					
Comments: _____					
_____					
_____					

<b>V. MATERIALS</b>	5	4	3	2	1
Were the materials clear and organized and appropriately helpful for the session?					
Comments: _____					
_____					
_____					

**Vi. What did you like the most about the session?**

\_\_\_\_\_

\_\_\_\_\_

**VI. Any suggestions to improve future sessions?**

\_\_\_\_\_

\_\_\_\_\_

**XII. How many years of gift planning experience do you have?** \_\_\_\_\_