

Trio Ask



We know a skilled trainer who calls this “the Cadillac of role plays”—expansive and comfortable, but one requiring some energy to make it run. In addition to the solicitor and the prospect, it includes an observer who functions like a backseat driver ... but in a good way.

When training clients for donor meetings, we return to this exercise again and again because it provides the best preparation for what they’re likely to experience during a real visit.

Before organizing this exercise, we strongly urge you to take your colleagues through *Face-to-Face Fundraising: Structuring the Meeting* on page 137.

Why Do This Exercise?

Because it provides the most specific, detailed preparation for conducting donor visits

Use This Exercise When

You have donor meetings scheduled ... soon!

Time Required

60 minutes

Audience

Anyone involved with your fundraising campaign who will participate in donor visits: some combination of board, staff, and volunteers

Setting

A quiet room that’s large enough for your group to form triads and easily hear one another speak. If the weather’s nice and you have an appropriate location, those teams who wish can move outside for the role-playing portion of the exercise.

Materials

- Flip chart paper and markers
- Completed Prospect Form (page 109)
- Sample gifts charts (pages 90-91) or a gift chart you’ve prepared specifically for your fundraising campaign
- Handout: *Face to Face Fundraising: Structuring the Meeting* (pages 140-141)

FACILITATING THE EXERCISE

1. In advance of the session, prepare two flip chart pages. On one page write:

Structure of the Donor Meeting

- A. Briefly build rapport
- B. State your goals for the meeting

- C. Uncover the prospect's interests
- D. Make a brief presentation
- E. Ask for the gift
- F. Uncover any objections
- G. Close the meeting
- H. Report to the office

On the second page, draw a triangle and then at the corner of each triangle write the words *Asker*, *Prospect*, and *Observer*. Below the triangle, write the following:

- | | |
|-------------|-----------------------------|
| 1-2 minutes | Set up the roles |
| 5-6 minutes | Role play |
| 4-5 minutes | Debrief in your small group |

2. Make sure your participants have already completed the ABCs of Identifying Prospects exercise on pages 106 and filled out the prospect form on page 109.
3. As you begin the exercise, ask your trainees to form groups of three. If both board and staff are participating, it's helpful to have a mix of board and staff in each triad.
4. Explain the roles to be played:

The asker. A board member, volunteer, or staff member who helps with fundraising.

The prospect. A current or prospective donor who is known to the Asker—in other words, he or she has a direct personal relationship.

The observer. The team member who gets to watch and comment after the role play is complete.

By the end of the exercise, everyone will have the opportunity to play all three roles.

Note: If you form triads and one or two people still remain, this exercise works with groups of four—you'll have an extra observer in each group, and therefore the exercise will take a little longer.

5. Explain the specifics of each role by reading aloud the descriptions below.

Asker – your goal is to:

- A. Introduce the work of your organization.

- B. Find out, through asking questions, what the prospect cares about and how your work might address his or her interests.
- C. Encourage the prospect to agree to a next step:
 - Make a gift or a pledge (*this is the primary purpose of the meeting, so start here*)
 - Schedule a follow-up meeting with the prospect's partner or spouse
 - Suggest other prospects
 - Volunteer to help with program or fundraising needs

Prospect – your goal is to:

- A. Learn more about this group without spending a lot of time.
- B. If you can, identify one aspect of the group, the project, or the presentation that catches your attention.
- C. Provide two or three objections or obstacles for the solicitor to address.
- D. Based on the conversation, decide if you will:
 - Contribute or pledge today
 - Delay your decision (“I’d like to think about it”)
 - Decline to donate
 - Become involved in some other way

Observer – your goal is to watch, listen, take notes, and be prepared to comment on what you see and hear during the debriefing period.

- 6. With the group, review the flip chart notes describing the structure of the meeting, talking your group through the specifics. You can augment this conversation by distributing the handout *Face-to-Face Fundraising: Structuring the Meeting* on pages 140-141.
- 7. To begin the role play, the trios divide up the roles for the first round. The asker reviews his or her completed prospect form (page 109) and chooses one person on the list, or simply picks someone in real life that he or she hopes to solicit. The asker then trains the prospect to “be” that person during the role play. This doesn’t require a full biography or complete history with the organization—just a few pertinent notes.

For example, the asker might say to the prospect, “For the role play, I want you to be my Aunt Rita. She always asks about my work and seems interested. She came to our open house last year but has never given. When I was at the theatre I saw her listed in the program as a \$500 donor, and she is also active in her church, so I know she’s a ‘giver.’ Let me tell you a little more about her ...”

8. Explain the debriefing model before beginning the role play, using the second flip chart page you prepared in advance. After each round, the trio debriefs the exercise as follows:
 - The asker goes first. He or she says two things about the meeting that went well (two compliments) and one suggestion for how to improve it. For example, “I was enthusiastic and I know the organization really well, but then I asked for the money and kept talking. I need to ask and have the discipline to be quiet.”
 - The prospect goes next, following the same format: providing two compliments to the asker and one suggestion.
 - Finally, the observer offers comments, following the same format: two compliments and one suggestion for the asker.
9. Each round of this exercise—dividing up the roles, doing the role play, and debriefing—takes about 15 minutes. Then all participants rotate to a new role. As the facilitator, keep general track of the time (you don’t need to ring a bell every 15 minutes), check in with the groups occasionally, and speed them up or slow them down as needed.
10. To debrief this exercise, reconvene the full group and ask some combination of the following questions:
 - What did you learn from this exercise?
 - When you were the asker, what’s one thing you did well?
 - What do you need to improve on?
 - What do you want to remember from this exercise to use the next time you ask for a gift?

TRAINING TIP Many are visual learners, grasping concepts more effectively through pictures and symbols, which is why we asked you to create the triangle with the words Asker, Prospect, and Observer. This simple graphic, paired with the number of minutes for each portion of the exercise, makes it easier to understand how the exercise is supposed to work.