



FUNDRAISING
ACADEMY

Maximizing Major Gift Officer Success: Strategies for Relationship Management

Wednesday, March 27, 2024

TODAY'S AGENDA

Maximizing Major Gift Officer Success: Strategies for Relationship Management

- **Cause Selling Cycle Overview**
- **Defining the role of a Major Gift Officer (MGO)**
- **Exploring strategies for effective time management**
- **Understand the importance of investing in professional development**



Meet Your Instructor

Meredith Terrian

Trainer, Fundraising Academy
National University

POLL



How many years of nonprofit experience do you have?



The Role of a Major Gift Officer

1. Donor Cultivation and Relationship Management
2. Strategic Solicitation
3. Managing Donor Data
4. Stewardship and Donor Recognition

CAUSE SELLING:

An Overview

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As a MGO, how does the word "sales" make you feel about your job?

The Three Fundamental Truths of Selling

01

If you don't know your cause, people will resent your efforts to sell it.

02

If you don't believe in what you are selling, no amount of personality or technique will cover that fact.

03

If you can't sell with enthusiasm, the absence of it will be infectious.

Passion Isn't Enough

Nonprofit is not a
business model



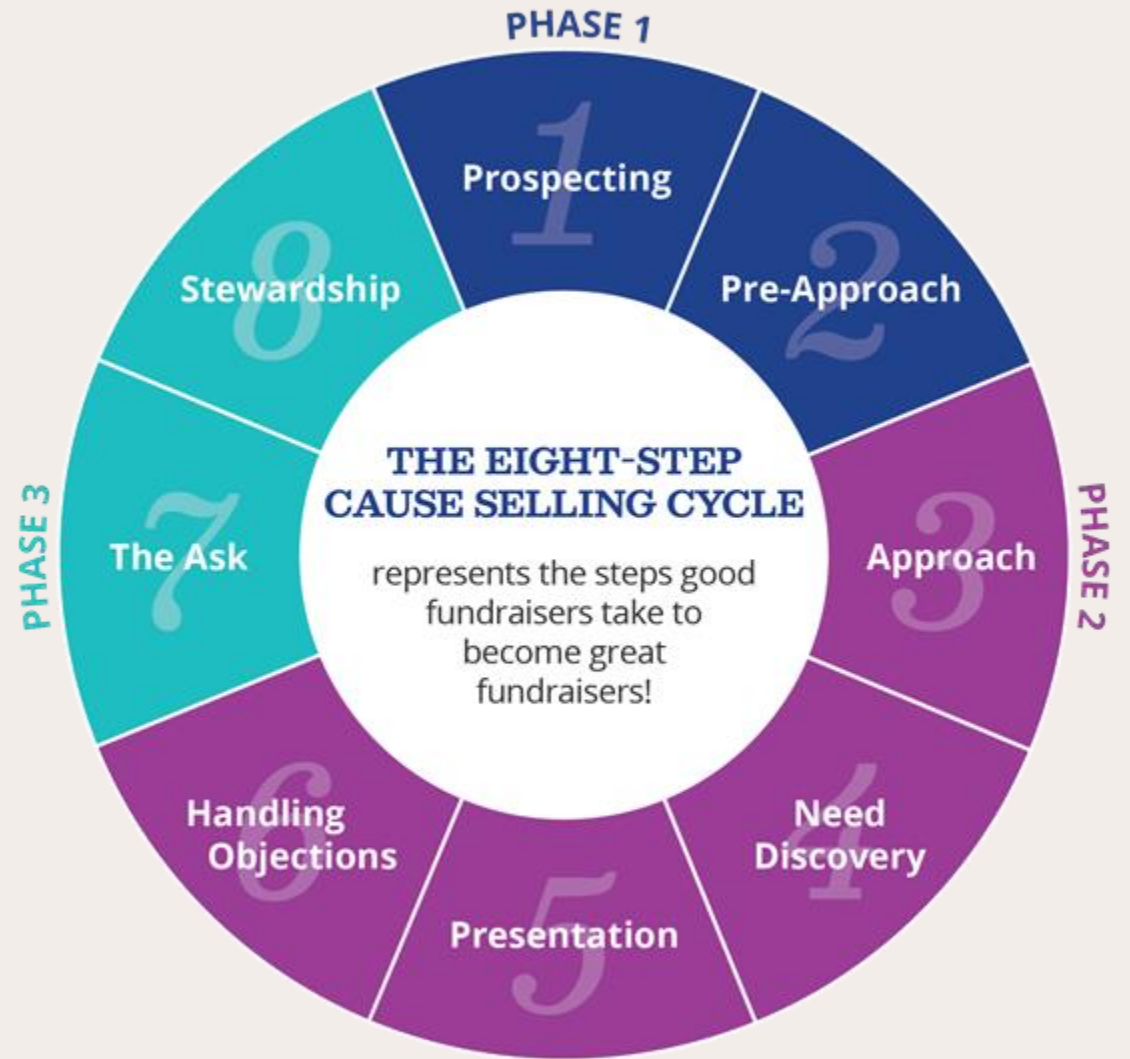
It's a **tax status**

Both profit and nonprofit need the same thing to grow.

Cause Selling Professionals = Future Focused Fundraisers

The Cause Selling Cycle

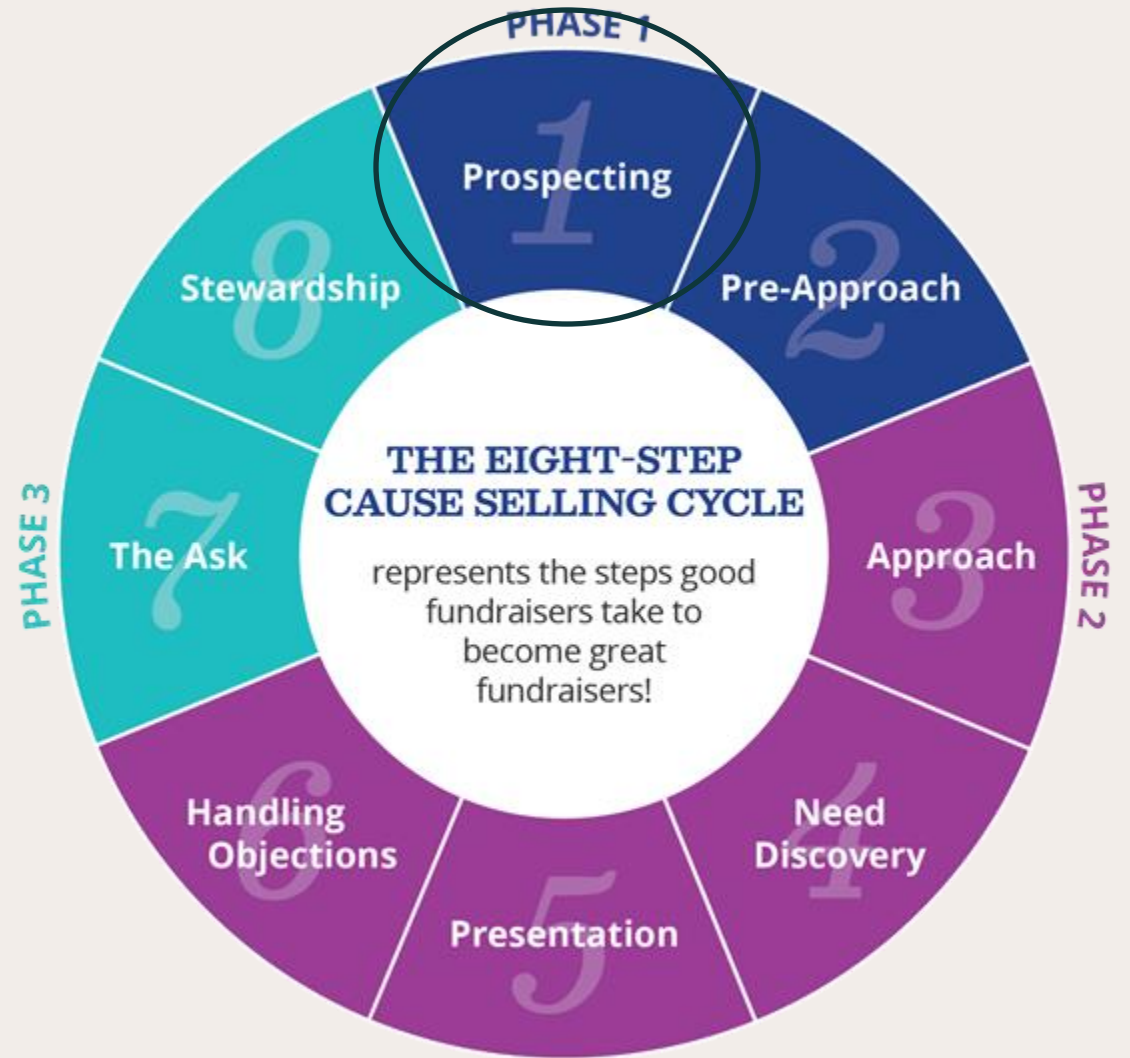
Phase One
Phase Two
Phase Three



*As a MGO, what is your 'product' and
who are your ideal 'customers'?*

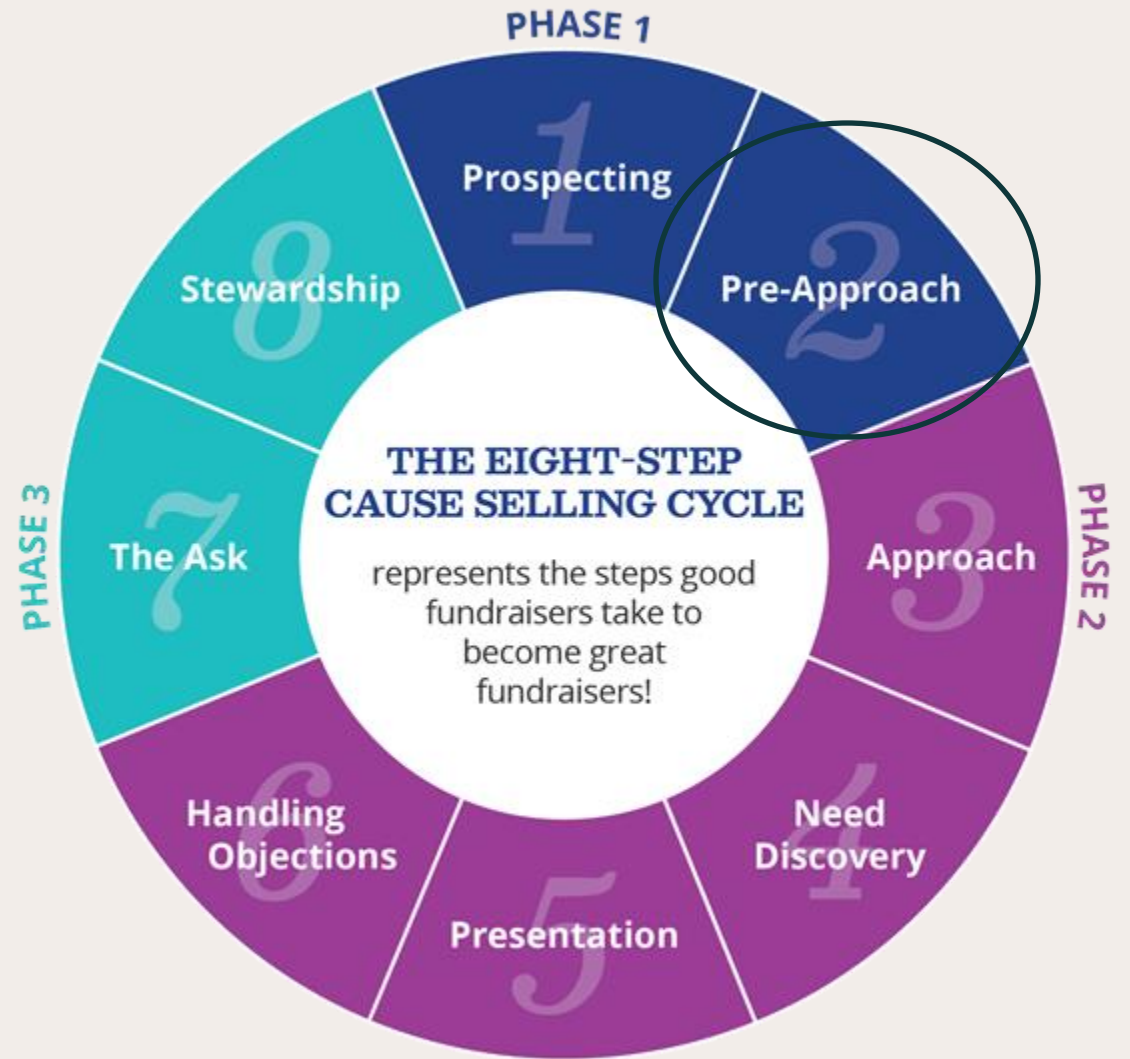
What is Prospecting?

The process of
looking for, or
searching for,
prospective donors



What is Pre-Approach?

The planning and preparation done **prior to contact** with prospect



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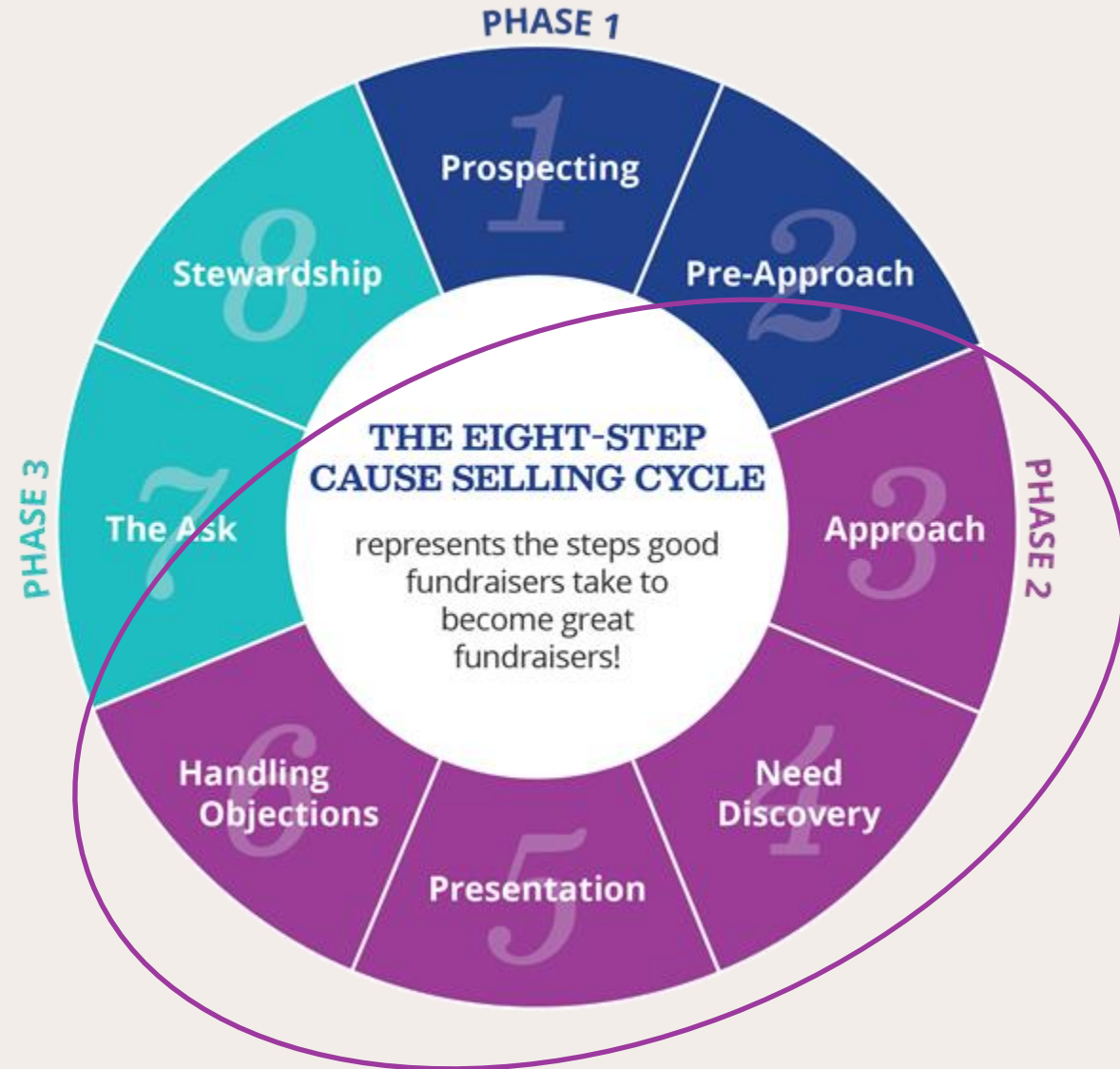


What stage in the Cause Selling Cycle do you find most difficult as a MGO?

Major Gift Officer Activity

Activity leads to results.

In fundraising,
we evaluate effort, but
measure results.



Time Management for MGO's

Prioritize the following:

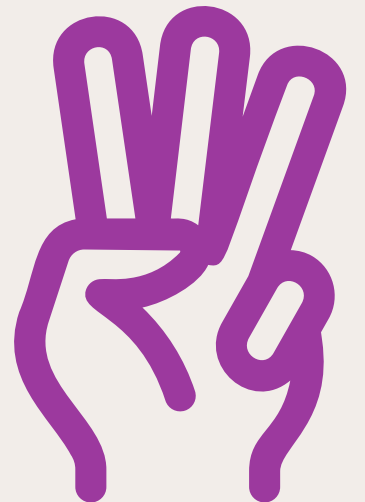
1. More one-on-one donor interaction
2. More efficient communications
3. More high-quality, target lists



Three Types of Interruptions

...and how to organize them as a fundraiser

1. People
2. Paper
3. Environment



Reasons for Failure to Close



Inadequate
Prospecting &
Qualification



Insufficient
Need
Discovery



Timing

As a result, the presentation focuses on the wrong features and benefits.

How managers can support MGOs

Compile Materials in Advance

Essentials

- Mission statement
- Work you do
- Size and reach of organization

Legitimacy

- Framework the cause and positioning statement

Depth

- More detailed info about the type of work, programs, people served, and more

Finances

- 990
- Audited Financials
- Organization operating budget

How managers can support MGOs

Prospect Review Meetings

Meet with MGO's frequently and consistently to review:

- Activity
- Pipeline
- Opportunities
- Challenges

Results will follow.



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As a MGO or manager, what are some ways you can prepare for common objections you have heard about your mission?

What donors really want to know...





Anatomy of Donor Loyalty

1. Find the donor's name (prospecting)
2. Gather the information you need (pre-approach)
3. Introduce themselves to the donor (approach)
4. Discover donor's unique passions (need discovery)
5. Tell the story of the mission (presentation)
6. Overcome potential roadblocks to giving (objections)
7. Ask for a gift (ask)
8. Follow up with results to foster loyalty (stewardship)

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As a MGO, where do you go to find professional development?



The Importance of Professional Development

1. Skill Enhancement
2. Networking Expansion
3. Career Advancement



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Visit our
**ONLINE LEARNING
PORTAL**

register.fundraising-academy.org





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CULTIVATE 2024

When?

May 2, 2024 | 8:00am - 5:30pm

May 3, 2024 | 8:00am - 12:00pm

Where?

National University | Spectrum Campus
9388 Lightwave Ave, San Diego, CA 92123



QUESTIONS?



@CauseSellingEd

Connect with Us!



Fundraising Academy
Cause Selling Education

Meredith Terrian



*LaShonda Williams,
MPA, CFRE*



*Hannah Berger,
MPA, CFRE*



Join our sessions:

April 8 | 3:45 - 5:00PM

Post Give Day Tips to Amplify Donor Loyalty
Room 715 A/B

April 9 | 10:15 - 11:30AM

**Unlocking Donor Potential Transforming Volunteers
into Cause Champions through Relationship-Driven
Fundraising**
Room 802 A/B

THANK YOU

TAKE YOUR CAUSE AND
CREATE IMPACT.



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