



FUNDRAISING
ACADEMY

Maximizing Major Gift Officer Success: Strategies for Relationship Management

Thursday, April 16, 2026

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



Jarrett R. Ransom, MBA

Interim Executive Director &
Trainer, Fundraising Academy
National University

POLL



How many years of major gift fundraising experience do you have?



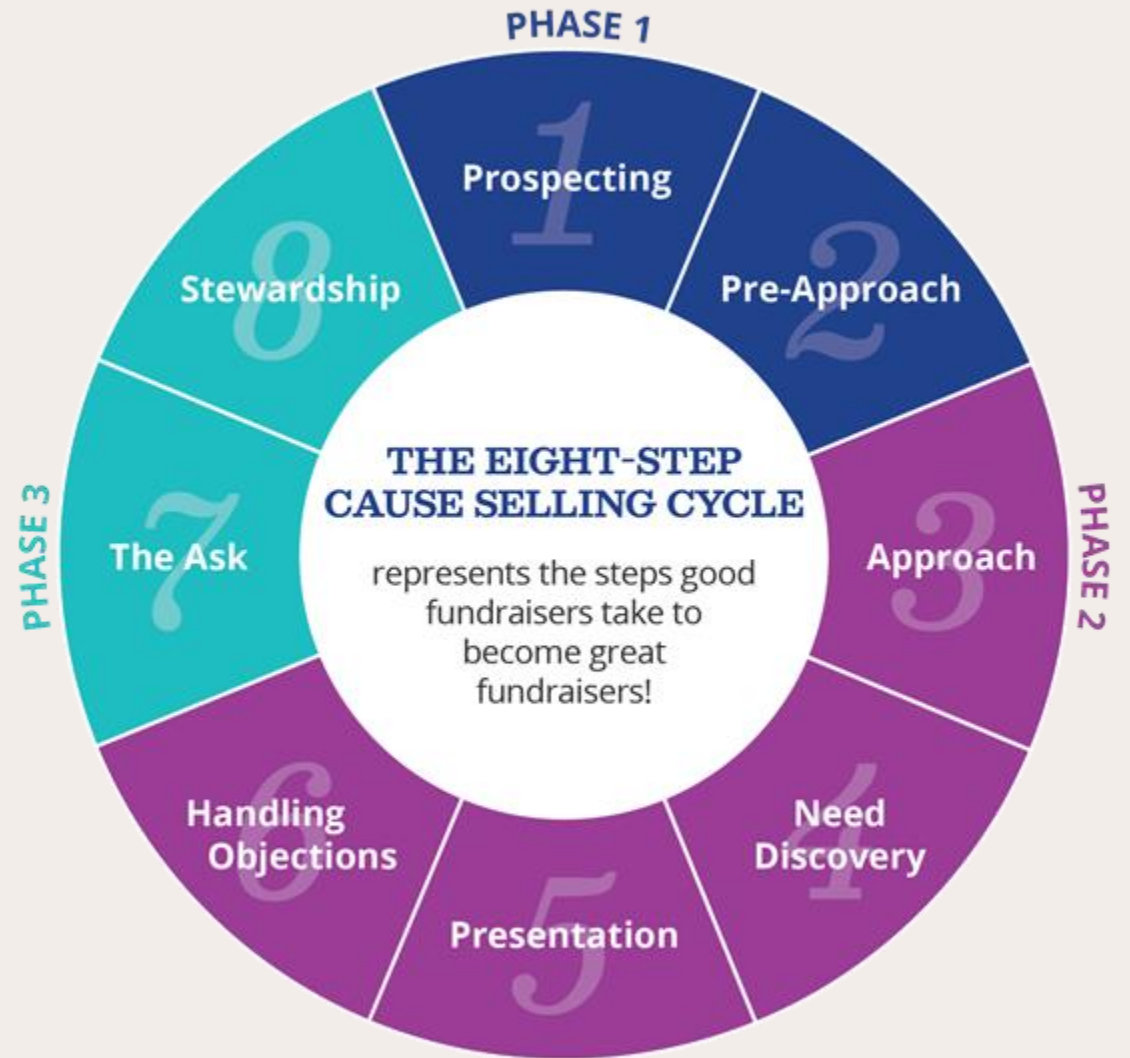
The Role of a Major Gift Officer

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

CAUSE SELLING: *An Overview*

The Cause Selling Cycle

Phase One
Phase Two
Phase Three



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

Tell us in the chat!

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**

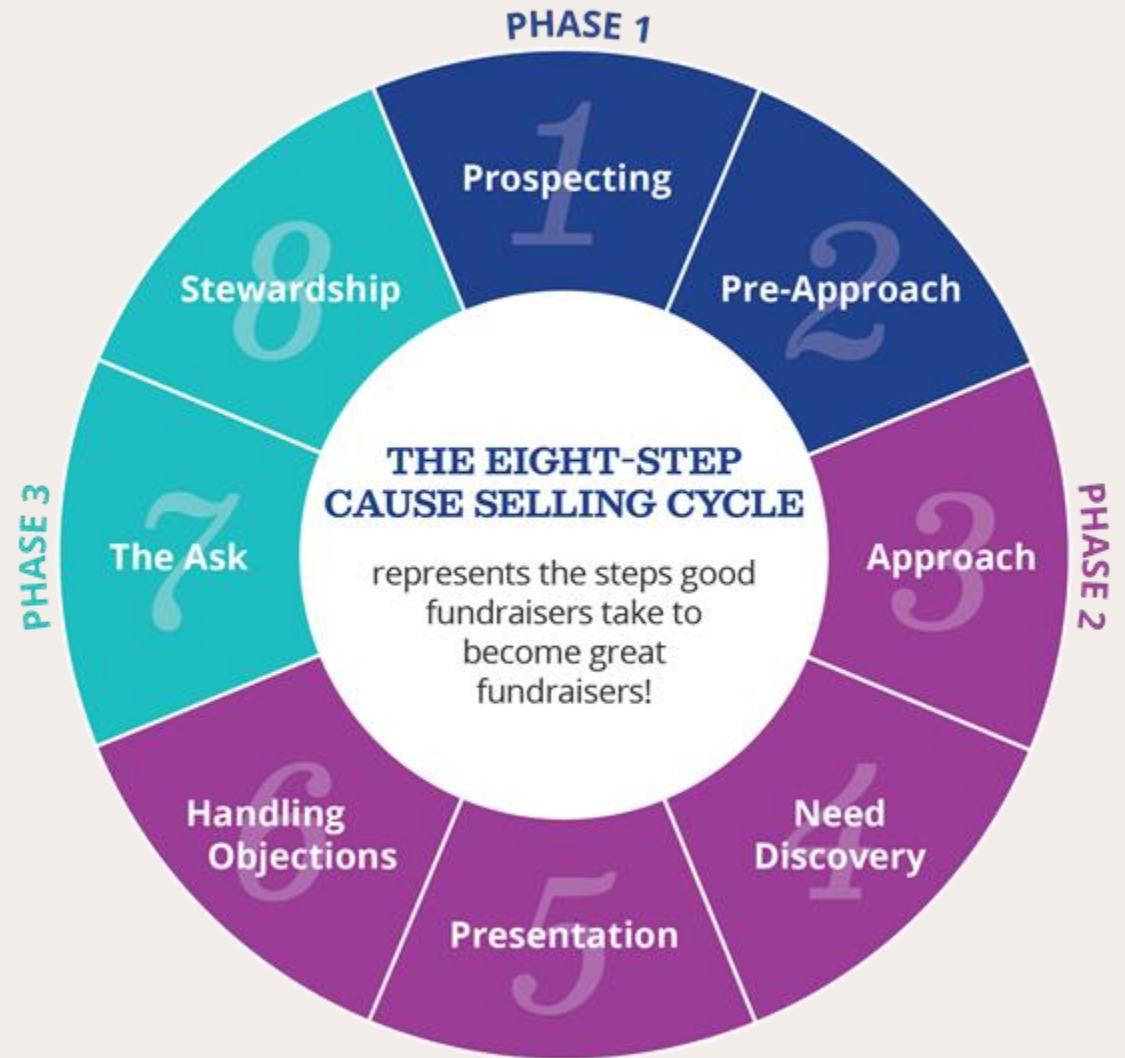
Both profit and nonprofit need the same thing to grow.

Cause Selling Professionals = Future Focused Fundraisers

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

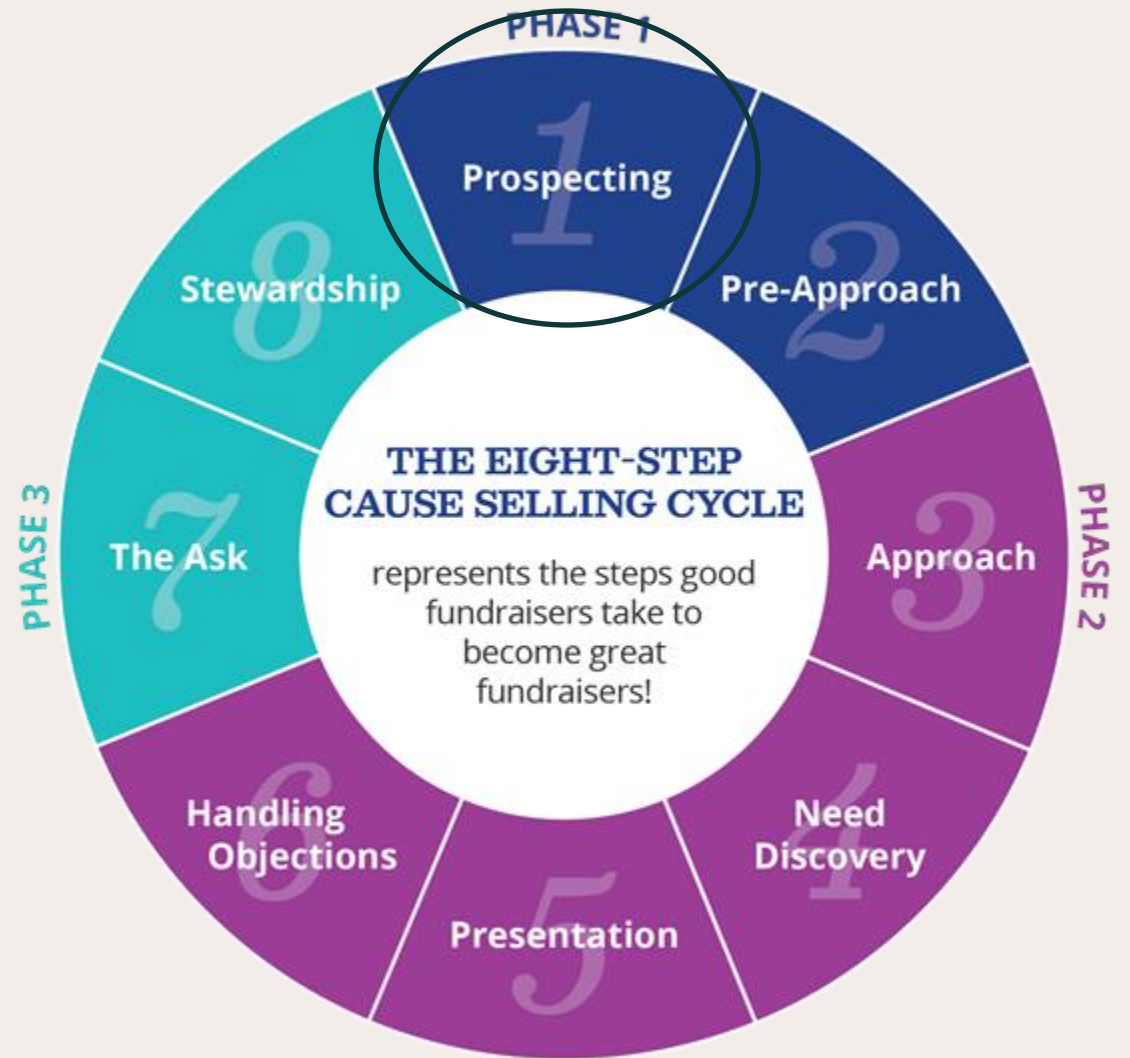
The Cause Selling Cycle

Phase One
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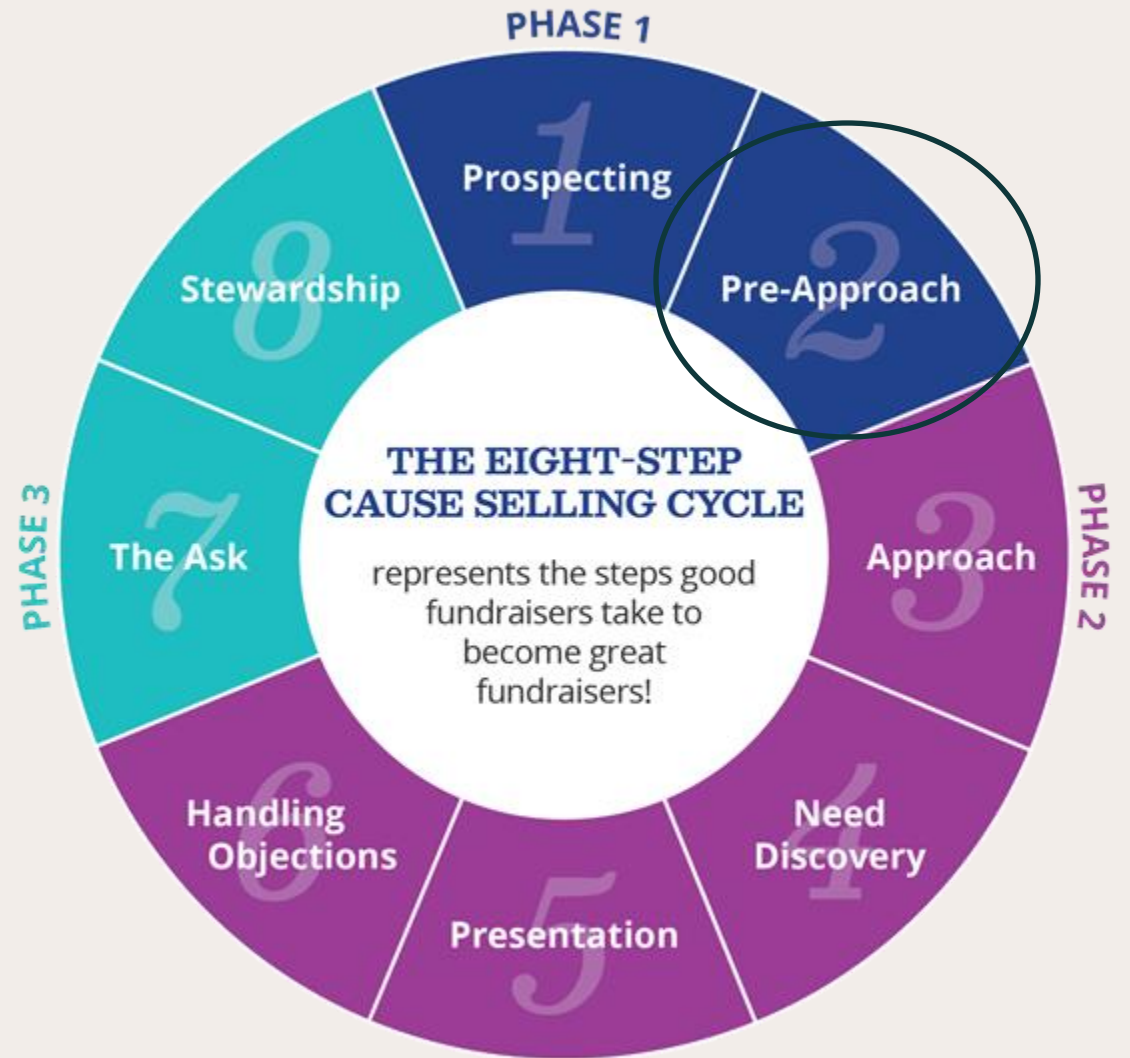
What is Prospecting?

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



What is Pre-Approach?

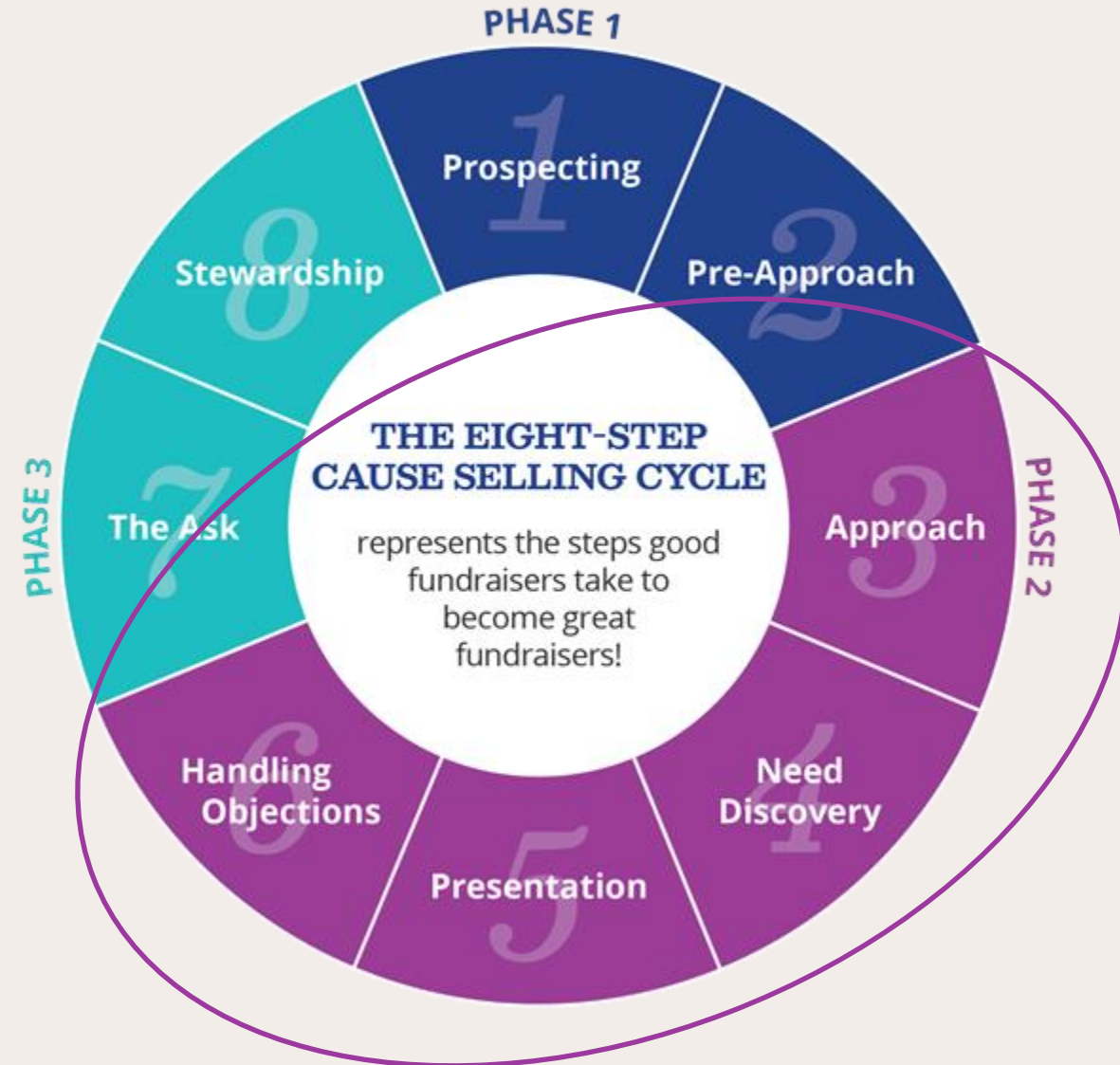
The planning and preparation done **prior to contact** with prospect



Major Gift Officer Activity

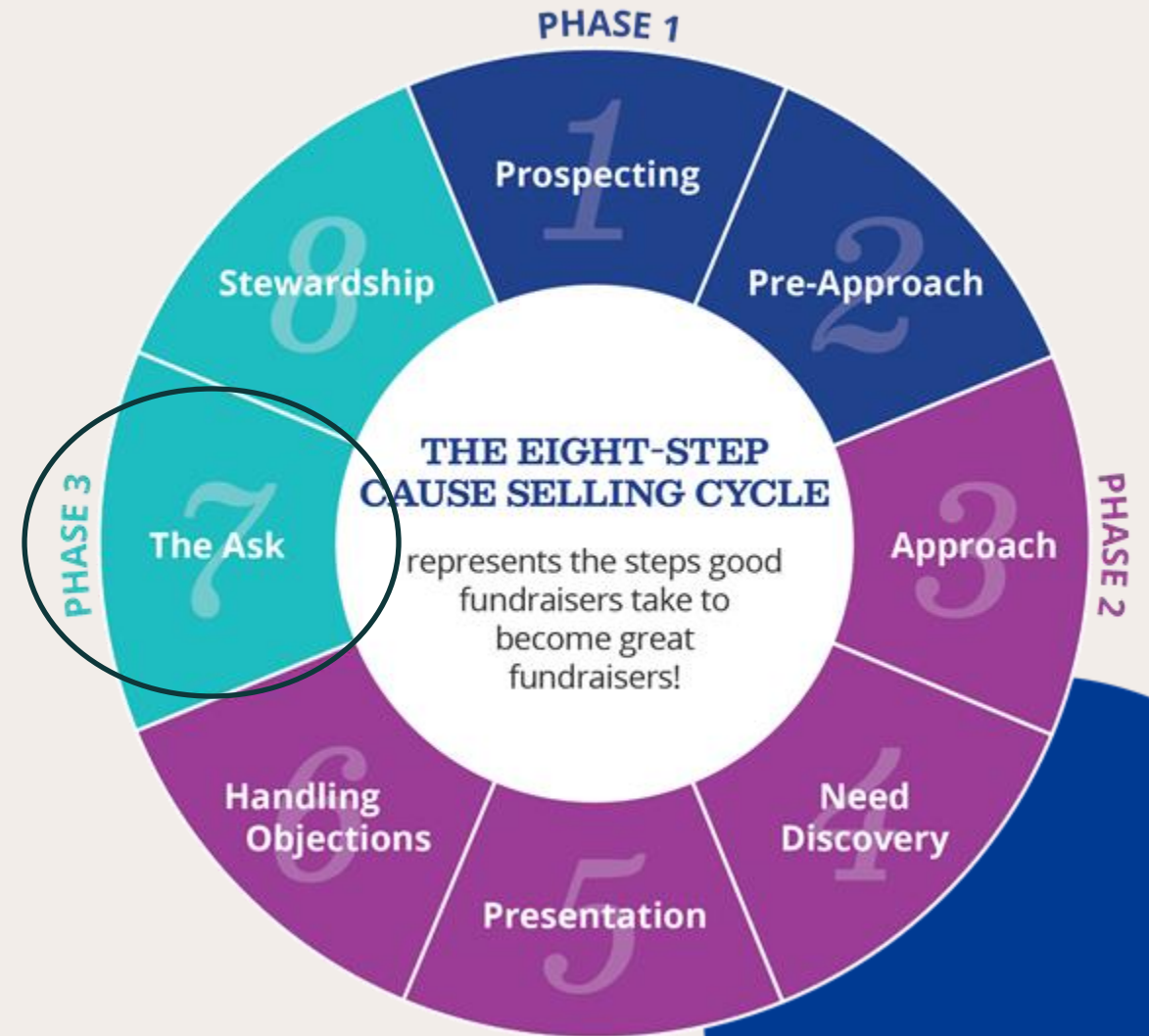
Activity leads to results.

In fundraising,
we evaluate effort, but
measure results.



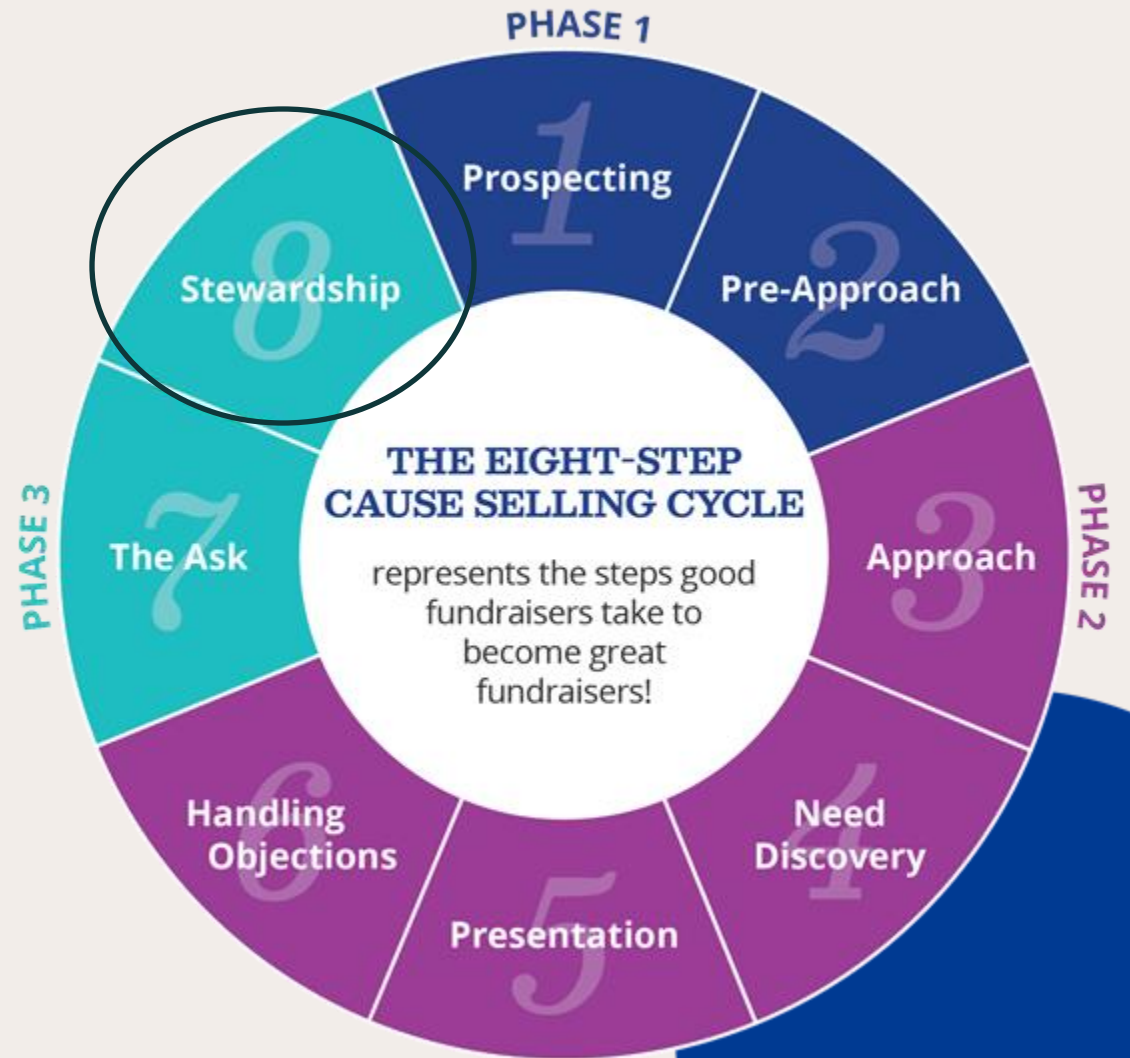
What is The Ask?

The **natural conclusion** to a successful interview with a prospective donor: a **clear and concise** invitation to support your cause



What is Stewardship?

Follow-up that fosters
**long-term donor
loyalty**



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

Tell us in the chat!

Time Management for MGO's

Prioritize the following:

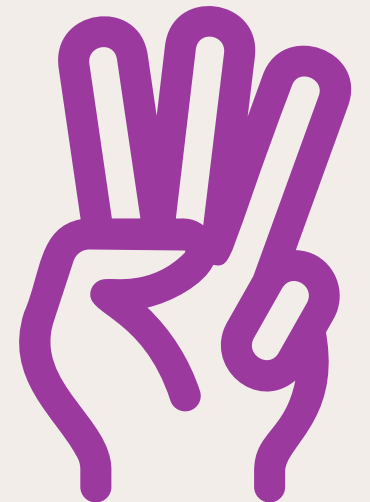
1. More one-on-one donor interaction
2. More efficient communications
3. More high-quality, target lists



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.

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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?

Tell us in the chat!

What donors really want to know...



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 an MGO, where do you go
to find professional development?

Tell us in the chat!



The Importance of Professional Development



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



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Register for our NO-COST **ONLINE LEARNING PORTAL**



QUESTIONS?



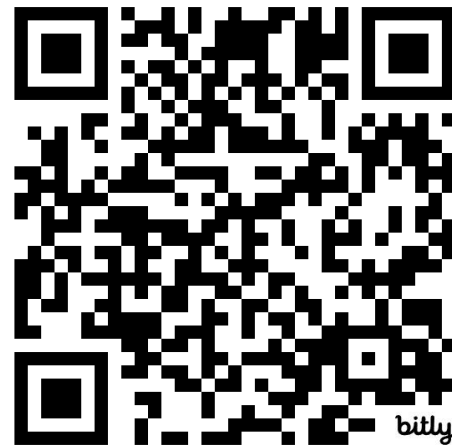
@CauseSellingEd

Connect with Us!



Fundraising Academy
Cause Selling Education

Jarrett R. Ransom,
MBA



Don't Miss Our ICON Sessions!



Jarrett R. Ransom, MBA

Sunday, Apr 26 | 9:00 - 10:00 AM
**Managing Value-Driven Donor
Objections with Confidence**
Room: 28 A-C



LaShonda Williams, MPA, CFRE

Sunday, Apr 26 | 4:30 - 5:30 PM
**Activating Digital Fundraisers to
Break though Pipeline Barriers**
Room: Ballroom 20-D

THANK YOU

TAKE YOUR CAUSE AND
CREATE IMPACT.



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