

Obstacles Major Gift Officers Face and How to Overcome Them

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Scheduling and Preparing for the Visit

- * Failure to “work” and analyze Top 30 list of prospects
 - * who is getting the next five proposals and for how much
- * Relying on emails “only” to set up visits
 - * Establish a “system” to call and be persistent
- * Over prepare for a visit – “paralysis by analysis”
 - * Do the research with your eyes & ears
- * Over emphasis on one visit
 - * Our goal is 200/year

Scheduling and Preparing for the Visit

(continued)

- * Better Gift Officer time management
 - * 4 days/week
- * Failure to capitalize on Alumni chapter events and campus events
 - * Another “touch” for one of your Top 30
- * A “feeling” that proposals have to be perfect
 - * They cannot be completely “vetted” for every detail

During the Visit

- * Missing closing clues in the conversation (think about nonverbal cues)
- * Allowing the prospect to direct/dominate the conversation – pleasant “interrupters”
- * Talking too much and “showing off” with how much you know – especially when two gift officers are present or with President – Listen
- * Not allowing the President or Vice President to direct the conversation

Closing the Major Gift

- * Always believing the prospect is not ready (one more thing we need to do) – Hesitation
- * Being afraid to ask – starting the money conversation (take a folder with you)

Follow Up After the Visit

- * Leaving a visit with “what is next?” up in the air
- * Obsession with paperwork – emphasis on call reports

Remember – at the end of the day,

- * Fundraising is a numbers game – the more visits to qualified prospects, and the more proposals for the right amount of money – the more money you will raise