



PEAK PERFORMANCE
FUNDRAISING

SYLLABUS — PEAK PERFORMANCE FUNDRAISING

Course Title:

Peak Performance Fundraising

Course Author:

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Course Description:

A step by step guide that covers all aspects of relationship based major gifts fundraising. What makes this course unique is that it is not passive or theoretical. As you go through individual modules you will be required to take specific actions with your donors. This is not a distraction from the work of fundraising -- this is fundraising. You will learn about how to deliver a fabulous giving experience to your donors that makes your organization the first organization they think of when they are ready to make a major gift. You will also go through the process of ranking and prioritizing your donors, scheduling and preparing for meetings, and preparing short-term and long-term Moves Management Plans. You'll learn how to understand your donors' listening preference, and how to craft your message in a way your donor can most easily grab onto it. You'll learn about the importance of asking strategic questions and listening the gift. You'll learn how to ask for gifts, and, better yet, how to close them. You'll learn about the 6 levels of fundraisers and how to attain the highest level!

Modules:**MODULE 1: Creating a Great Giving Experience**

We will discuss:

- The Starbucks Experience and making ordinary things extraordinary
- Loving your donors and treating them as human beings, not wallets
- Consistency Theory
- You cannot script service

MODULE 2: Peak Performance Metrics

We will discuss:

- Shortcomings of wealth screening services and the power of personal visits
- Process of growing, cultivating, pruning Moves Management Lists
- How to use Points System
- Getting in the way of success
- Continuously having all types of meetings and keeping your funnel full

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Modules (Continued):

MODULE 3: 12 Steps to Getting Visits

We will discuss:

- How asking for a visit is the first ask and needs to be prepared for in the say way you prepare for asking for a gift
- Strategies for increasing your visit close ratio

MODULE 4: Understanding Listener Types & Creating Tailored Messages

We will discuss:

- What makes a good story?
- How to tailor stories to listener types
- Understanding your own listening preference
- Marketing principles and donor psychology

MODULE 5: Asking Strategic Questions & Listening the Gift

We will discuss:

- The 85/15 Rule and why you need to get your donors talking
- The importance of asking questions
- What happens when we fail to listen

MODULE 6: Preparing for & Scripting Meetings

We will discuss:

- How to script meetings and prepare a “line of questioning”
- Creating a quiver of stories based on Listener Types
- The 80/20 Rule
- Understanding the limited amount of time you have in any meeting for your pitch

MODULE 7: Creating Short & Long Term Moves Management Plans

We will discuss:

- The importance of having to plan instead of saying, “let’s see what happens...”
- How to create a bold yet realistic plan
- How to adjust your plan following each meeting
- Adjusting Prospect Evaluation Worksheet Scores & re-ranking your donors

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Modules (Continued):

MODULE 8: Asking for the Gift

We will discuss:

- Transactional gifts vs. transformational gifts
- How much to ask for
- Preparing a pitch and writing a pitch script
- Knowing when to ask
- “Ready, Aim, Fire”

MODULE 9: Closing the Gift and Dealing with Objections

We will discuss:

- Answers to common objections (RSTLNV)
- Action steps
- Challenge questions

MODULE 10: Stewardship and Consistency Theory

We will discuss:

- Keeping the sizzle
- Which is better? Assimilation or Contrast?
- Why is it easy to “WOW” your donors
- True service comes from the heart