



Discovery Conversations: A Step-by-Step Guide

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Discovery

- Intentional conversation to uncover what motivates your donor or prospective donor
- Introduces your organization or project
- Explores where your donor's motivations align with your mission
- Opportunity to build trust and your relationship with your donor
- Helps establish priorities and efficient use of time

“If you’ve got a meeting, you’ve got a gift; it’s just a matter of when and how much.” – Brad Cecil

Discovery Meeting Structure

- *Be clear in the purpose of the meeting when you request it.*
- *Identify roles ahead of time for participants*
 - *Subject-matter expert*
 - *Volunteer/peer influencer*
- **Welcome/Introductions**
- **Organization/Project Overview**
- **Discussion of Gift**
- **Summarize Action Items**
- **Closing**

Tips

- Play the conversation out in your mind as you prepare
- Put yourself in the donor's role and consider questions you would ask
- Be curious
- LISTEN carefully
- Observe verbal and nonverbal cues
- Adjust approach based on different donor types and available research
- Use talking points as a guide, not a script
- Bring materials as a leave-behind
- DO NOT bring a proposal unless specifically requested

Discovery Meeting Questions

- Thank you for your past support!
- How are you/things going at the foundation/company?
- Can you tell us about your charitable giving priorities?
- Is this a project that would be of interest to the trustees/company leadership/you and your family?
- We've noticed you are a committed supporter of ANOTHER NONPROFIT IN TOWN. How did that partnership develop?
- What motivates your decisions: HR or PR?
- How can we strengthen our request to you?
- How are decisions made about funding? Who is involved in that process?

Discovery Meeting Questions

- What is the process to apply?
- Do you have deadlines that we should be aware of?
- Is there a deadline that you recommend we target for our request?
- Do you have any guidance on a reasonable gift range for this project?
- Gifts can be made over a multi-year period – is that preferred?
- Would a naming opportunity be of interest?
- Is there anyone else who should be included in follow up from us?
- What are your preferences for updates moving forward?
- How would you like to receive updates before our formal proposal is submitted?

Example 1:

Individual Stretch Gift

Example 2:

Major Corporate Gift

Example 3:

Foundation Managing

Expectations

Example 4:

Donor Explaining Process

Key Takeaways

- Example 1: Discover the donor's story
- Example 2: Partnership over transaction
- Example 3: Value discovery, not assumptions
- Example 4: Listening and stewardship

Thank you!

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