

**Nonprofit 911 – July 14, 2009**  
**The Influential Fundraiser:**  
**Using Psychology and Neurology to Win Over Donors**  
with Bernard Ross  
Sponsored by Network for Good

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**Rebecca Higman:** I am very happy to introduce our speaker, Bernard Ross who is the Director of the Management Centre in UK and he is an expert in strategic thinking, organizational change and personal effectiveness. He works internationally in Europe, the US, Africa and South America. He has worked with a wide range of nonprofit organizations over 25 years, including the British Red Cross, Amnesty International, Greenpeace International, UNICEF, Oxfam and the British Film Institute. So without further ado, I am happy to turn the floor over to Bernard.

**Bernard Ross:** Thank you, Rebecca, and it is very nice to be able to speak to you and your colleagues across the States.

**Rebecca:** Thank you so much.

**Bernard:** Later on in this session, I am going to tell you something about Rebecca that she doesn't know about herself from listening to her voice and from hearing some of the things she said. And you will be able to recognize a pattern that Rebecca uses the way she likes to speak. She has quite a high tune to her voice and she uses a lot of words like "see" and "look for." So when she was talking about web pages, she talked a lot about the design and the layout because the visual things are very important to Rebecca. And if she were a donor and I am a client at a fundraiser, that would be important for me to notice and to use when I try and make contact with her. So let me tell you later when I come to that about how to do that.

And part of that is about this session I want to do today which is based on a book I have just written with a colleague, which if you look at the first slide, this is about two things. It is about neurology, which the way your brain is organized. It is a slightly horrible thought, but if I were to slice the top of your head, where do you store different bits of information in your brain?

If your brain is like a giant computer, where are different bits of information stored? And how can our knowledge of that help me understand you as a donor. And although I am talking about donors, I could also be talking about board members or colleagues whom I want to influence, not just to ask for money. How would that help me?

The second thing apart from the neurology, which is like the hardware of the brain, is psychology, which I think of as being the software for the brain. So psychology is like our beliefs and attitudes. And again, if I want to send Rebecca an Excel file with a

spreadsheet in it, if she doesn't have Excel she couldn't read it. And if she wanted to send me a PowerPoint slide and I didn't have the program PowerPoint, I'd have to upload it.

So how can we learn to upload other people's programs, beliefs, attitudes, values in order that we can understand them, not only do we need to accept them, but we can understand them? So this session will kind of flick between neurology, the hardware, and psychology, the software of your brain in order to be effective at fundraising.

And I think I want to say strongly that these are almost the only competitive advantages that you can have. And you probably don't have as big a marketing budget as The Cancer Charity or the Track Fur Cause, the furry puppy dog cause, so how can you gain a competitive edge in a tough fundraising market? And the answer is by using the potential you have in terms of neurology and psychology.

If you look at the second slide, I think I want to explain a little bit about what I mean by influencing. And I think influencing skills involve three things, first of all getting people to understand what the challenge is. Let me give an example about a cause that is so important to me.

I heard Rebecca mention that those at least one HIV and AIDS charity there listening in. I am sure there are several. That's still a terrible disease that affects lots in the world. I have a very special commitment to Africa and to working in Africa and especially sub-Saharan African.

I wonder if you know that it is just a matter of doing the mathematics that at the current rate of infection, by the year 2020, there will be 65 million AIDS and HIV orphans in sub-Saharan Africa. That's 65 million children aged under 12 who will be orphans as a result of the AIDS and HIV pandemic.

I am guessing that some of you at least are drawing in your breath saying, "Oh my goodness I didn't know that." But I wonder whether or not you do know that, you will decide to commit your life or some of your money to doing something about because often as fundraisers for social causes we believe that if people just understood that one in three women will be affected by breast cancer or one in six children will be subject of inappropriate exploitation from adults or one in ten is socially excluded as a result of their sexuality from some rules in society. If all people understood that we take action for our cause and I don't know that that's true. Sometimes a piece of data doesn't change people's minds.

The second level which is important for influence is do people accept that it something to do within because you might say, but I understand there are going to be 65 million AIDS and HIV orphans in sub-Saharan Africa, but actually there is nothing I can do about that, maybe President Obama will do something about it or Prime Minister Brown and maybe Mr. Zuma, the President of South Africa, will do something about it.

So very often we need to get people to accept that they can do something about it and especially when we share big problems. If I were to say your \$20 a month does make a

huge difference to this cause even though you know the cause will take many millions of dollars to solve.

So part one, getting people to understand the nature of the challenge. Part two, getting people to accept that they can and should do something about it. It is not someone else's responsibility. The third part of influencing, I think, is the hardest part and the part I am going to concentrate on in my session really, which is getting people to act because very often we understand something and accept it, but we don't act on it.

I can't see you out there, but I am going to ask you to think about this question: how many of you would like to lose weight? That maybe quite a personal question, but I can't see you. So you might be saying, "But I like to lose a little weight. I maybe have five or six pounds I would like to lose."

OK, let me ask you a question. Do you understand the secret of how to lose weight? My guess is that lots of you think, "Hmm the secret of how to lose weight..." Maybe there are two secrets; one, eat less; and two, exercise regularly. Goodness, you know the secret. And maybe you accept that it is your job to look after your weight. It is not your mother's or your sister's or your partner's.

So my question is if you understand what to do and you accept what you should do, that it something that you should do something about, why don't you act on that piece of knowledge? You see in a funny way that piece of knowledge about eat less, do regular exercise, that piece of knowledge hasn't acquired a positive charge or positive energy. And if it doesn't have a positive charge or positive energy, if we can't give pieces of information a positive charge or a positive energy, then we will not achieve influence. So lots of this session is about giving this information positive charge and positive energy.

Let me introduce you to a model that my colleague Clare Segal and I have developed and it involves the five P's. And the five Ps are laid out as five cogs. They are Passion, Proposal, Preparation, Persuasion and Persistence. And the reason why I have laid them out as pieces of cogs is because the process of influence is not a straightforward linear step one, step two, step three, step four process.

It is actually an interactive process where some things you ratchet back, some things you ratchet forward, where one small turn of the wheel can have a big difference and I want you to keep that in mind as we go through the five elements of our model that you might be flipping back or flipping forward as you go through the process of influencing someone.

Let me take you through then the five elements and give you in each case a little insight into some of the tools that we use, or we are suggesting we use, in our book and in the downloads that it will be helpful to you. And these are really just meant to be insights because actually although this is relatively simple, it is not easy. Being good at this stuff is a challenge.

Let me take you into passion, which is my first wheel that is now highlighted. If you are there with someone else, I would like you to turn to that person and ask them, "How are

you?" And see what the response is. And if you are there by yourselves ask yourself, how am I today.

And you might also like to say, tell me what your job title is even, if you know ask them what your job title is and listen to the response. Now, I don't know, but the answer you heard back was -- but perhaps when you say to people in not-for-profits, "How are you?" They say, "Oh I am fine. Things are OK," and because what we do is very difficult, so sometimes we feel quite crushed by the burden of what we are trying to achieve.

And sometimes when we say our jobs or we say something like I am the regional manager in-charge of social care instead of saying, I'm the regional manager in-charge of social care! So passion is about two things. And the first person to start with passion is passion for yourself. Can you switch on passion when you need to do it?

I don't mean faking things, but I mean maybe you wake up in the morning and the cat died and that's a bad thing. And I am sad for the cat and I am sad for you, but the donor doesn't know and probably doesn't care. How do you talk yourself up and get yourself energized for the donor? Here is my first tool. And, again, there is a big download about this on the website that Rebecca mentioned.

My first tool is called anchoring. You may not have heard of this one before, but it is a technical word relating to the idea that we throughout our lives collect anchors or triggers which give us strong emotions. And it goes back to a piece of psychology from a very famous Russian doctor called Pavlov before we had Pavlov dogs.

And Pavlov did a famous experiment where he had some dogs in a cage who were hungry and he brought in some meat which had been cooked. The smell of the meat really went through the hole and he rang a bell as the food was brought into the room where the dogs were.

And he did this several times, rang the bell, brought in the food to the hungry dogs; rang the bell, brought in the food to the hungry dogs. And then the fifth time, he just rang the bell, didn't bring food in for the hungry dogs. And the dogs salivated as though they could smell the food.

And actually we all have anchors in our lives, we are not dogs, but we have anchors in our life. So there is almost certainly an anchor you have about smell, which reminds you of your childhood or a taste that reminds you of your childhood, maybe a comfort food that always brings back when your mother or your father used to make something for you.

And that is an anchor and it is great that we have positive anchors. Sometimes, sadly, we collect negative anchors like a piece of music. There is a piece of music my partner had of her mother's funeral and sadly now, every time she hears that piece of music, she flashes back to her mother's death some years ago.

So we create anchors. The interesting thing to me is can we generate our own anchors to get us passion? And I think we can. If you look at the next slide, there are two swimmers

and one of them you probably recognize. One of them you maybe don't. This is after the first race at the Olympics.

And the guy in the front looking very excited and very gleeful is a British person who has just come second and he is hugely excited that he has just come second and he is waving to his mother and feeling excited because he is so in the moment. You probably recognize the athlete at the back and you notice that he is not waving to anyone; in fact he is not looking at anyone at all. He is in a little world of his own despite the fact that he is the one who has just won. The guy in the front is second.

And what that athlete at the back is doing is he is remembering, he is anchoring, what it is like to win because he wants to go and win seven more medals. He wants to remember what the feeling of winning is like and how you get there.

And I think sometimes as fundraisers when we have given a great presentation or a fantastic donor interview or given a great interview for a new job, what we need to do is to learn to be more like the swimmer at the back and capture how does it feel, how did I do that, can I remember this movie of how I am successful so that when I need it, when I am feeling down or low or the cat died, I can play that movie back, and that is anchoring. And that's a great way to give yourself a direct practical energy that you can get back. So you will find out more about anchoring in the download.

I feel a little better looking at the next slide about donors and making donors passionate or if you like donor motivation. And you notice here that I have a slide which has two dimensions to it. One dimension is called hygiene factors and one dimension is called motivators.

And this is based on a piece of thinking from a psychologist called Herzberg and what Herzberg says is that in any motivational situation, there are some things which are hygiene factors. So, for example, if you went for a new job and the first day you turned up and the person who greets you says, "Oh goodness, you turned up today, hmm..., I wasn't expecting you. We don't have a desk. We don't have a staff manual. We don't have a computer," you would really be not very happy about this new employer.

But if you turned up on your first day for your new job and your boss or your supervisor said, "Hi, and yeah we are expecting you. You have a computer, you have a desk, you have a chair," you wouldn't call home on your cellphone in which you may say, "This is fantastic. This job has desks and computers." I can hear some of you laughing and saying, maybe we would, actually.

The hygiene factors then are those things which if they are not present will make us unhappy about any kind of psychological transaction. And donors need hygiene factors too, so donors need to know, for example, that you have a good board. They are not motivated by having a good board, but it is the hygiene factor for them.

Donors need to look at your accounts and see that your accounts are clear and transparent. I am not going to give you money because you have good accounts, but it is a hygiene factor. If accounts aren't transparent, I am worried. Donors like to see that they

can get tax breaks for what they are doing. They are not going to give you money because they are getting a tax break, but if you were to explain how the tax break system works, is that useful for them?

You can think about all the different things which are hygiene factors that will make a donor not feel happy but if they are not present, they will feel unhappy. On the other side of what are conventionally called motivators for donors and I am going to tell you there are 27 different motivators for donors, 27. You can find a list of them in the downloads and in my book.

I also think that most donors, I don't think, I know from doing this work that most donors aren't motivated by one thing. Donors are almost like, I kind of want to apologize for the next as well, but it is a good one, almost like an ATM machine where you have to "beep, beep, beep, beep" put in a four-digit code and you should put in the right four-digit code, the money comes out.

Donors often have a cluster of three or four motivations and you need to hit the three or four buttons from them from the list of 27 and if you do that, you will be successful. I'd like you to think a little bit about the idea that there are 27 different donor motivations and see how many of them you can work out. I'd like to move on.

So back to my model, we have done passion. We are now going to look at the idea of proposals. How do you shape a frame what you can ask for either interpersonally or written or even on the web? And I want to make a strong statement here. I don't apologize for doing it. I think it is worth saying.

Almost everything you have ever been told about writing cases is not wrong, but just old fashioned. It is about 70 years out of date. So let me tell you what's new in cases and, more importantly, what's working. I think you can construct a case from two dimensions and if you look at the grid on the next slide, you can see what the two dimensions are.

Cases are about two factors -- a positive or a negative outcome on a present reality or a future reality. And that gives you four possible case propositions, and every case can be written in four possible ways.

The interesting thing for donors is that all donors have a preference for one or more of these options. They may not share the same preferences you have. That is very important. You probably like one of these options, but of course if you are trying to convince, for instance, a donor, you need to click into or match their preferences.

Let me walk you through this. Let's think about a positive future, a vision. Some things you might say to a donor -- let me go back to the HIV and AIDS crisis in Africa -- "It would be fantastic with your money we could make sure that every woman in sub-Saharan Africa has a clinic she can go to get antenatal advice within as little as two day's walk. Every woman would have a clinic within two day's walk, wouldn't that be great? You could make that happen. You could do it for one clinic or 100 clinics."

Some things you might want to say, that there is a future negative. I am going to call that a risk. The risk is that if we don't provide antiretroviral care for women who are pregnant now it is just the math that by 2020, if we run the risk, there will be 65 million orphans, AIDS orphans, aged under 12 in sub-Saharan Africa. That is the risk we run. Some donors will prefer that risk; will identify more with that risk than with the vision.

There is a positive present, which is an opportunity. I could tell you now that most HIV issues can be dealt with through a class of drugs called antiretrovirals. And some of the leading antiretroviral drugs are about to go off patent; any company will be free to copy them in two year's time.

I can tell you now that many of the big pharmaceutical companies are offering to sell antiretroviral drugs, maybe five years worth of antiretroviral drugs, for 20 percent of the cost now because they want the money up front and they know they won't be able to make any money in two year's time. "If you could give me, as a donor, a million dollars now, or \$10,000 now I can get 100,000 or \$10 million worth of drugs if we take this opportunity now in this short present timeframe."

Finally, there is a negative present, which is a crisis. Let me tell you, I am sure many of you remember the tsunami, which happened on Boxing Day, 2000, I think it was. In that tsunami 155,000 people died. Let me tell you, because you may not know it, that every two weeks a tsunami sweeps across Africa, and 155,000 people, the same number who died in the tsunami, die every two weeks as a result of AIDS and HIV. That is a crisis that we have to deal with now. In the same way we dealt with the tsunami crisis we have to deal with that crisis now.

I have used the example of HIV but, of course, I don't need to use as dramatic one as that. I could say I run a lot of theatre projects here in the city. My vision is that every child in the city will be able to come to take part in theatre projects and do that. I would love you to donate your money in order that we can open the building next door and make it available to everyone.

Or I could tell you my future risks, my future negatives, which is my risks. Let me tell you that if we don't fix the weakness in the roof then this building will not be useful in two year's time and no children will be able to come to the theatre.

I could tell you that this is a fantastic opportunity and that the building next door has become available. It is a special price because of the credit crunch if we can buy it in the next three months. If you can make a donation to buy it in the next three months we will be able to acquire the building, what a fantastic opportunity.

Or I can tell you there is a crisis; there is a negative crisis now, which is that we don't have enough money to pay the electricity bills in our theatre center. Tonight at 5:00 I will switch off the lights and we will not open tomorrow and every child in this town will not have the chance to take part in theatre.

You probably can take your cause or case and translate into one of those four modalities. If you do that you will notice that you have a preference for one of them, but the donors

may have a different preference. Your job is to match the donor's preference, to transfer your case into one or more of those.

Let me go into my next model, which I want to do quickly. Passion. Get yourself geared up, get other people. Proposals. Shape and organize the way you present your idea. Preparation. And my tool for this is very simple. When you are going to meet a donor you should think about your limits. I am looking at the next three slides together here.

A limit is you like to get, you intent to get and you must get. This is very, very useful, especially when you are dealing with a corporate, but you can also use it with individual donors. What would you like to get, a 100,000 gift. What must you get, a 20,000 gift. What do you intend to get, between a 40 and a 60,000 gift.

What would they like to get? They would like to have their name on the building. They must get at least their name on a plaque inside the building. They intend to get a plaque inside the building and an invitation to a special gala event.

You can think about your like, intend and must and the donor's like, intend and must. When you do that you can see what I have called the classic engagement, which is where your like, intend and must and the donor's responsive like, intend and must overlap and they can move between each other. It is not a fixed overlap.

I have given you an example in the next slide of a fundraiser trying to make a sponsorship deal with Driver Core, which is an invented charity. She is trying to make a deal with Driver Core on behalf of a breast cancer charity. If you want a general example from the web you can do that. But it gives you an idea of how you can think about the like, intend and must, around about cash investment, monetary support and continued support. It is a wonderfully power model to think about. What would you like to get? What do you intend to get? What must you get?

Let me move on now to our next slide and that is about preparation, which is about thinking about the issue of persuasion. In the book this is the area we spend the most time on. There is a huge amount of what you can do on how to persuade people. I think persuasion is thinking about what is the software in someone's brain? How do they think about and process information?

I just want to give you one simple tool which I think might be useful to you. But most of the tools, whatever they are, are about building rapport. They are about getting on with people, because lots of donors aren't like you. They are older than you, or they are younger than you. They are a different race or culture from you. They speak a different language. They are a different sexuality. They have a different faith.

You need to be able to get on with those people, to have a rapport with them, to have a sense of trust and understanding without losing your sense of identity. So how do you get into rapport? One way is to understand, and I am looking at the next slide now, that when we communicate we communicate through three channels.

The words we use, "Hello it is nice to see you." The tone of voice we use, "Hello, it is nice to see you!" Or, "Hello, it is nice to see you." And the body language, a hug or a kiss or a slight grumpy face.

These channels have a relative impact. The relative impact is not the same as their importance. But the relative impact is that the words perhaps only constitute seven percent of the message. The voice constitutes 38 percent of the message, and the body language constitutes 35 percent of the message.

Although people are listening to our words, like you are listening to my words now, the tone of voice that I use to accompany the words makes a big difference to the content. And if you could see my body language, whether I was being expressive, or standing up, or sitting down, or looking glum, or looking cheerful, it would add a huge amount to that. I would love to be with you and show you some of that stuff but there are some nice illustrations in the book.

And for a moment just ask if you can be curious and I want you to very quickly look at the three statements in the three boxes and think about what does the red one say, the pink/red one, what does the yellow one say and what does the blue/green one say if you can see them on a computer screen. Or what does the statement on the right say, statement in the middle and the statement in the end.

And now look away and say them to yourself about what did each of those three statements say in the three boxes. So look away and just say them to yourself. OK and now look back. Now my guess is something that like 80 percent of you -- I can't see the exact number, but it is what normally happens when I do this exercise -- think that the box on the right says "a bird in the hand." And it doesn't. It actually says "a bird in the the hand."

My guess is that you thought the middle slide said, "Paris in the spring," but it actually says "Paris in the the spring." And the last one says "once in a lifetime," but in fact says "once in a a lifetime." In this my point is that we are very often not really curious about people and by learning to be curious about people, by which I mean really studying what this person is really like where I am thinking, "Oh I know what women of that -age are like." "I know what middle aged persons or men like." But if you actually generally study people, we can discover some interesting stuff.

So let me tell you one interesting thing which I'd love you to learn about and pay attention to and this really brings me back to Rebecca and some of her preferences. There is a body of work called "neurolinguistic programming" or NLP, which is a dreadful title but it stands for something quite important: neuro, the brain; linguistic, the words; programming, the way we organize and sort.

And what neurolinguistic programming tells us is that the words we use gives a very good idea about the way in which we process information and make choices. And this body of work came about from two social scientists called Bandler and Grindler, a alumnus study of people who were excellent, people who were doing really well, so some lawyers seemed to get clients more often, some doctors or therapists seemed to enjoy

more success than other people and interestingly studied car sales people, so that slide is a slide of car sales people.

And they actually filmed a number of car sales people on different car lots and noticed that on the same car lot selling the same cars for the same financial deals, one car salesperson would do 10 times better than the other car sales people and other colleague in the same car lot, so why was that.

And they studied the videotapes and studied the videotapes and they did cool things like mirroring and matching and all that stuff, but actually the single biggest thing they noticed was that people actually speak in one of three language systems and that these successful sales people noticed this unconsciously and believed it matched the potential buyer's system.

So the three systems are, I am looking at the ear at the top of the slide, an ear for auditory. Some people when you speak to them, you will notice they say things like "We need to understand what it is that you are saying. It doesn't make sense to me. I'd like to talk this through with you." And she is talking double dodge.

So they will use words or phrases to do a sound or auditory and those people very often have very even melodious voices or they speak like that. And when they breathe, they tend to breathe very evenly and they very often hold their hands either across the chest or they will clutch their chins as they speak.

So if you look around the room and if you are in a room, you might see some people really paying attention by holding their chins and those people are quite possibly auditory, one of the key clues. Some people, and I am looking at the slide, are visual. So if you download the mp3 for this, listen again to Rebecca's introduction and notice that she uses a lot more words about visual, like "I am pleased to see so many of you are here," but in fact she can't see anyone who is here at all.

But Rebecca makes movies in her head, she likes to process information visually. So she might say to me, "I see what you mean" or "I don't see what you mean." Whereas if a person is auditory is more likely to say, "That doesn't make to me, I don't understand what you are saying." Rebecca is more likely to say, "I don't see what you mean" or, "Can you sketch out to me what is important?"

And these car sales people that we talked about would sell the car saying, "You'd look great in this car. It is got beautiful lines. It is a fantastic color." Whereas to the auditory person, he would say, "She sounds like a racy car, you can hear the radio and you will be able to drive home without having to listen to any air intake, rattles or vibes in this car.

And there is a final cluster of this system or of people that use language and the bottom symbol is a nose and a heart and a hand because some people are kinesthetic. And by kinesthetic I mean feeling -- that is they like touch or they like senses or they like emotions. So they will say, "I can't really get a handle on what this is about," or "I feel like I am really being pushed into a corner" or, "This is so tough" or, "I am loving this."

Now next time you are with someone, maybe even after this seminar is finished, why don't you ask someone, "Tell me what you like about your house or your apartment or tell me about your last holiday." And some people will say, "I love the pink color of my house." Some people will say, "We got a fantastic view of the yard with all the firs." And some people will say, "I just feel really safe and comfortable there."

They are talking about the same house, but they are showing a preference to one or more of these linguistic systems. And my point is like the car salespeople, if you learn to match a donor's preference for how they consume information, you will get your message across, be more influential more easily. And that is also true on the web, in emails. Just read any piece of text and you will notice people's preference. So NLP, a way of changing your language in order to match someone's preference.

I am looking at my watch and I think we have got three or four minutes left before we move to questions. So let me move on to my last button, which is about persistence. Two tools I have here and I think persistence is to me the key skill in fundraising. The reality of fundraising is that people more often say "no than not" even using these wonderful tools I am introducing to you, people say no more often than not. You have to kiss a lot of frogs in order for any of them to turn into a prince.

So you have to learn to be persistence and the anchoring tool I talked about earlier is good for doing that. We can also think of another technique that I call perceptual positions. And again, there is a big download about this but the basic principle of perceptual positions is very simple.

When you ask people a question like how was the party? What was the party like? Some people will say or will go inside their own body and will almost imagine they were back at the party last night and say, "It was fantastic. I had such a good time. I was in my best shirt and my trousers and I was dancing and it was great." That is they will almost relive the event and will kind of probably shake themselves like they were dancing again.

Not everyone does that. Some people will say when you say how was the party, "Well, I went into the room and people were looking as though I was really behaving badly, but I was just enjoying myself. I don't know why some people feel they have to judge you. I was having some fun and dancing around, but that is not wrong and I had such great fun that people were really thinking I was over the top."

But there are some people who will talk about -- when they talk about an experience will refer to how other people perceive them and some people will do what is called position three that is, when you say how is the party? They will say, "Well, I was dancing with this guy and some people were kind of looking on and you know I was talking to the guy but I thought that was fine because I could see that nothing wrong was going on. We were just like dancing and it was kind of fun and we were all listening to music." But they actually almost feels out as if they were in the movie and can play it back.

And a good little exercise for this is when we finish this seminar if you want to shut your eyes, imagine yourself being at say a dinner at Christmas or Hanukkah or Id or some festival and imagine yourself sitting at the table with your relative and then imagine

yourself going around and sitting on the other side of the table and looking at yourself. How did you look? And then standing over the wall like a waiter and observing yourself interacting with your relatives. You'll get a picture of that.

What you'll discover is you have a preference for one of more of these perceptual positions, and what you'll discover is that donors do too. And if you learn to understand the preferred position from which donors like to find out about things, you can adapt your story or your tale or your example to make it relevant.

If you have a preference for position two, you might well say to someone, "Imagine what it's like if you're a 12-year-old and you're alone in the city and you don't know what to do" And some people will go, "Hmm. I have no idea what it's like to be a 12-year-old alone in the city."

But some people will immediately, even though they're 50, imagine what it's like to be alone in the city. That's because they do position two. Again, there's a great download about this which explains it in more detail. And it's not easy, but it's very powerful.

Let me give you my last two and then I'm finished, and I'm happy to answer questions. And the last two are just about nine no's." There are nine ways that people say no, and really what they mean is, "Ask me a better question." Let me go through the nine no's and see if you guess them quickly as we go through them, and how many you can get.

I think sometimes people say no and they mean, "No, not for this." So we hear no and we get distressed and we go away, when actually they mean, "No, I don't want to give you money for your education program. I'd be interested in giving money for you social welfare program." So actually they mean, "Ask me a different question. Ask me for money for a different cause."

A second no is, "No, not you." That means they don't want you to ask them for money. They'd like someone older or younger or a different faith or a different sexuality or a different character. They'd like someone else to ask them for money.

A third one is, "No, not me." People sometimes say, "No, not me," because they say, "You thought I was a decision maker." Actually it's my wife or my husband or the marketing manager or someone else. You just asked the wrong person. And they mean, "Ask me who you should ask."

Some people say, "No, not now." We hear no, but maybe they meant, "No, not now. Wait for a year's time when my company goes to IPO." Or, "Wait three years time until my daughters have left university and I have some money." Or, "Wait until a new financial year and we can talk about a gift."

Some people say, "No, not unless..." We hear no, but they mean, "No, not unless I get to meet the president." Or I get to meet the mayor of the city or I get have my name on the building. What's the condition they want to actually have?

Some people say, "No, too little." That means, "I'm curious." I did say, "No, too little." Sometime the Bill Gates of the world want to do something big. They don't want to do a small project. They want to be challenged or ambitious about a big project. So give them a big project that appeals to their sense of results or importance.

Some people say, "No, too much." You asked to big a sum. And actually what they mean, "Ask me for a different sum. Ask me for less. I can't give you \$100,000. Tell me what \$50,000 would do." Or \$25,000, or \$1,000, or \$500.

Some people say, "No, go away." At which point you should probably go away very politely and thank them for listening to you. Thank them for listening to you.

I think I've got through my nine. I'm just trying to check if I've got through them all. There are nine no's, there's a download about those. And the nine no's are just with us learning to be persistent and learning to hear the no and thing, "Are they asking me to ask a better question?"

So this is my Five P Model: passion, proposal, preparation, persuasion, and persistence. I think if you use those you become a much, much better fundraiser, without an increase in the marketing budget, a huge brand, you're just using your own skills of your own neurology and your own psychology to reach other people.

There's a little slide next which says [ManagementCentre.co.uk/download](http://ManagementCentre.co.uk/download). You'll be able to click and download a whole lot of free articles. And if you'd like read the book, I'd love that. Or there's a special website about the book which gives you key study examples you might find useful. That's all downloadable there.

So, Rebecca, I make it just 10 till, so we've got 10 minutes for questions if I can hand back to you. And thank you for the chance to do this.

**Rebecca:** Excellent. Thank you for joining us, Bernard. And we do have questions that have come in so far. Our first question comes from Catherine. Catherine says, "On the page about making the case of that matrix, what percentage of typical donors fall into each box?"

**Bernard:** What a great question. I'd have to say I don't know. I know one thing. I know that every part of us as fundraisers would love the key driver for donors to be vision. The positive result that all of our organizations have, the vision we have of how great it would be. Every pragmatic fundraising part of me knows that the most common thing that drives people is crisis, sadly. Sadly, a crisis will drive people to action. And you know the same thing is true for losing weight. I think lots of us only think about losing weight when we've go, "Oh, my goodness, I can't button up my pants, I can't fit into that dress, I'm going to look terrible at my wedding or terrible on the beaches." The crisis that drives us to action.

So I couldn't allocate a percentage. And actually, I'd like Catherine to be curious about which drives other people. But if you had to ask me for a generality, I'd say choose crisis.

Although sadly, I wish it wasn't so. Fantastic questions, Catherine. Thank you. And thank you, Rebecca, for asking it.

**Rebecca:** Absolutely. Our next question comes from Mitch. Mitch would like you to review what those percentages were that you mentioned for each of the channels on slide 19.

**Bernard:** OK. The percentages are - and these are about the relative impact. So if you think about the words, the words constitute perhaps seven percent of the message. The voice is 38 percent. And it's interesting to me how much voice is. That's a huge percentage. That makes voice tone very important, say, on the phone. And body language is 35 percent. So again, please don't hear that as the words are not important. It does not mean that. What it means is that if the words are contradicted or challenged by the voice tone. "I'm sure things are going to be fine here in the fundraising department despite the cash crisis." I'm thinking oh, hang on, there's a contradiction between the words -- "I'm sure things are going to be fine despite the cash crisis" -- and the tone, "I'm sure things are going to be fine."

I prefer the voice tone over the words, and the same is true with body language. So be aware you need to match all three, otherwise you experience a phenomenon known as cognitive dissonance. That's a problem if we don't get that right. I hope I answered that question.

**Rebecca:** We have a great question from Nancy. Nancy says, "Regarding creating cases, if I'm making an appeal to a number of different people, for instance through a newsletter or a letter appealing for donations, should I try to appeal to several different views - negative, positive, present, future - in the text, to cover all the bases? Or is that too confusing?"

**Bernard:** Another great question. I would say to try and do all four. If you don't know what the preference is then have different points where you refer to different propositions. Maybe give them a crisis, since that's the strongest driver, and even say we can turn this into a risk. We can take advantage of this opportunity and we could make it into a vision. So you could actually use them as a little sequence like that: crisis, risk, opportunity, vision. You can use them in a sequence. I think that tool is very similar to the tool I mentioned in terms of changing language to visual or sympathetic.

But if you look at a piece of DM or a website, you can very often see the preference of the person who has written it. It will be very apparent to you. It's very useful to mix and match those. And again in the book, I think I've done quite an interesting analysis of Martin Luther King's famous speech, where he talks about moving between the quotations from the American Constitution, and then he goes on to talk about the red hills of Georgia, which is like a picture, and then he finally talks about the deserts sweltering with injustice.

I mean, Martin Luther King is born and speaks and dies before any of this psychological stuff is discovered, naturally works in all three modalities because he's speaking to a quarter of a million people.

And I think you'll notice that lots of great authors or lots of great speakers actually naturally reflect between those three styles. Just for the rest of us, we have to practice. Back to you, Rebecca.

**Rebecca:** Jennifer might have a good follow-up. She said, "When writing general information like newsletters, what's a good group to cater to in terms of those preferences -- auditory, visual, and kinetic?"

**Bernard:** Again, a fantastic question. Here I actually have quite a solid piece of data, which is that - and this is what you mentioned at the start that I do a lot of work in African and South America. I'm in Washington next week; I was in Rome last week. And I'm in Asia in a month or so. The interesting thing about the visual, auditory, and kinesthetic, is that it's worldwide. It's not a cultural phenomenon. This is about the way our brains are hardwired. And globally hardwiring, something like between five and 15 percent of people are predominantly auditory. Auditory is much more unusual than usual.

Something like between 25 and 35 percent of people are predominantly kinesthetic. They like the feeling of words. And something like between 45 and 55 percent of people are predominantly visual. So they're more like you, Rebecca.

Now having said that, a quick tip is that interesting lots of people in the finance sector or the IT sector, most people in the IT sector, I would say, were predominantly auditory. So you know to use a lot more words from the auditory register.

That's very important if you're speaking to the treasurer or to the finance director of a company and you want to try and impress them, just notice whether they're perhaps more auditory. So you might want to say, "I'd love to talk you through the budget. But shall we get out of here, it's quite noisy here, and go somewhere where we can hear ourselves think?"

Those are classic little auditory statements. And you'll find you can build much better rapport with a finance director, whereas maybe if it's the CEO of the organization you're dealing with you might say, "I'd love to see what your plans are and re-sketch it, what the big picture is, then we can focus on how we can help you." And you might come back to them and say, "I'd love to see a way of working with you, because until quite recently it's seemed quite foggy, but now we can shine a light on what's possible."

So even in a single conversation, you can just switch styles and match people. With practice. I should say, with practice.

**Rebecca:** Excellent. We have a couple of questions that I'll put together, so Pat and Jill wrote in about different outreach channels. "How can you use some of these techniques for emails, letter writing, phone conversations, which are different ways where a lot of fundraising is done where you don't have the opportunity to have body language, etc?"

**Bernard:** Sure. I've tried to steer away from the body language part, of which there is a lot in the book. I think body language is a hugely rich source of information. Certainly if you use email, but if you get someone to send you an email, you can get useful

information from them about their language preference, visual, auditory, kinesthetic. Let's say someone from a company invites you to their office and you ask for directions. A visual person would say, "When you emerge from the subway, you'll see a big yellow sign just over the street. Just watch out for the cars as you cross the road. If you look out for the receptionist, she'll let me know you're there."

Whereas a kinesthetic person might say, "Once you've fought your way off the subway, you might have to battle your way across the road. Hopefully there'll be a welcoming sign there and then our receptions, who should greet you and I'm sure make you comfortable when you come see me."

Those are exactly the same instructions simply done in a different modality. And I could do the same for auditory. So by listening to people, by hearing what they're saying, you can actually pick up on their preferences. Either by email or on the phone.

If you ring someone up and say, "Can I talk to you now?" They might say, "I can't really see how I can see how I can talk to you just now. I'm trying to focus on what's important here in the house. I don't pull down the shutters, but I need to just blank you out." So this is a visual person saying, "Go away. I don't want this call."

Whereas as a kinesthetic person might say, "This is a very difficult time to call. I'm really struggling to get through the things I have to do today. I don't want to cheese you off, but could be make a more convenient time to talk?" So that's a kinesthetic person giving you the brush off.

So if you pick up on those kind of things in an email or in a phone conversation, you can match them and that will give you greater rapport and greater influence, because you'll be able to communicate more directly in the style they prefer. That was a long answer, Rebecca.

**Rebecca:** We have a really great question from Sue. I think she's turning it around and not just talking about the donor, but about herself as the fundraiser. She says, "No is more passionate and personally giving for the agency I work for. Still, I hate to ask for donations? We have excellent outcomes and I'm proud of all we've accomplished, yet I still feel uncomfortable asking. What's causing this?"

**Bernard:** Oh, I don't know. There might be all kinds of reasons. I'm not a psychotherapist, I should stress. I think it might be interesting - sometime it's about the personal rejection, that when someone says no, they're saying no to us. That's like when we ask someone out on a date. You say to someone, "Do you want to come out with me?" And you're terrified they're going to say, "With you? Really not." But actually that hardly ever happens. Most people would say, "Oh, I'd love to, but I'm busy." That's the worst that they say. So sometimes it's about that fear of failure, fear of rejection. And to be a really good fundraiser, you have to be able to overcome that.

The one thing I would suggest is if you're looking for a practical technique - and again, there are some practical techniques mentioned in the downloads and in the book - is to try the anchoring technique, to try and remember a time when you felt powerful and strong

and good about asking - because you must have had that experience at some point - and to retrieve that memory and find a way of cueing yourself. Sometimes you can choose to pinch yourself or to touch your finger or to rub yourself. That's what the anchor really is, when you give yourself a little stimulus to bring back that memory.

Recall that very intense experience you had when you were successful and happy about asking, and you had a good outcome. But you had the feeling. It's not an intellectual thing. It's a feeling thing that you have to have. Make sure you're going into first person, that is that you need to be in your own body doing that, and then give yourself an anchor.

So when you need that - it's a bit like a famous swimmer, how do you record that like on a DVD in your brain for when you need feeling or that strength or that passion or that commitment or that engagement, you can get the feeling back.

Don't dissipate it like the guy at the front, who's just so in the moment he just can't remember it. Make sure you capture it and organize it. Then you can use it for later. I hope that helps.

**Rebecca:** Definitely. Let's see, we've gotten three or four people who are writing in and would just like a quick rundown of the nine nos. A few people missed one or two.

**Bernard:** You probably recognize that there aren't really nine. It just sounds good to say nine nos. But in fact, you can make up many more. I'm more interested in now just saying how can you think about, "I'm not just being rejected here. The person is asking me to ask a better question."

OK, I've got up my nine no's, which I didn't count as I went through them. But I will count them off now. Absolutely this is on the downloads, so if anyone's worried about it.

OK, here we go, they are:

"No, not for this." Ask me for a better cause or a different reason.

"No, not you." I don't want you to ask me. I want someone different to ask me.

"No, not me." I'm the wrong person to ask. You think I'm the decision maker, I'm not.

"No, not unless..." These are the conditions attached to it.

"No, not in this way." I can't give you cash, but I can give you a building or some transport or some printing.

"No, not now." I think we mentioned to which you should say, "When is a good time? When will things be different?"

"No, too much." Which is, I don't have that amount of money.

"No, too little." I want to do something important and meaningful. And that doesn't have to necessarily be about billionaires or millionaires. I remember when my mother died in the hospital, and I remember going to the hospital. The guy in hospice - I said, "I want to

help." And he said, "That'd be great, if you could buy us a new TV. We need a new TV for the ward." And I said, "But that'll cost like \$500. I want to do something big for you. Ask me to raise you a million dollars. I'm a really good fundraiser." And actually he didn't ask me to do a thing that was big enough.

And my last one is, "No, go away." To which you politely say, "Thank you very much for taking the time to listen to my proposition."

**Rebecca:** OK, Jessica is wondering what strategies you have for getting the conversation going once you've got the donor already on the phone or at the table.

**Bernard:** OK, fantastic question. And I would say the first thing to do is to ask them about themselves. How did they come to be interested in the cause, or what kind of a day have they had, or have they ever supported a cause like this before? Do they support any other causes? Most donors aren't mono-causal. I think I may have just invented a new word. Talk to them about what interests them. Just by asking questions like "How was your day" or "Tell me a little bit more about what you do for a living," they will give you more information about how they organize and think, what some of their psychological preferences are.

They're talking about a subject that's not mission-critical to your fundraising ask, but you're all the time collecting information. This sound slightly Twilight Zone. Collecting information about what language preferences they have and some other, what I call "mental software preferences" they have.

So I'd begin by talking about them. It's like going on a date. You get the person to talk about themselves and find what interests them, and see if there's a match in any way. I would encourage you to use dating as a way to find out about fundraising.

**Rebecca:** OK, we have a question from Jerry, and Jerry says, "Have you any experience in using donor levels, or donor-level tables? Some fundraisers have alluded to a method of having donation levels using dollar amounts and something like gold or silver or platinum levels, and asking donors to look at the chart and point to what level they see themselves giving."

**Bernard:** That's interesting. I've never done that. I wouldn't point to the chart. That seems like a fairly odd thing. What I've worked with, I think I technically called them "super-clubs." Super-clubs are very interesting for other areas, which I'd love to do a seminar for you about. In general, super-clubs shouldn't be - for example, you should never call them gold, silver, and bronze, because no one ever wants to be in the bronze club. And the silver club just sounds like it's for people who didn't get into the gold club.

So for example, if you're doing an art gallery, you might call them the "Picasso Club," the "Brach Club" and the "Mondrian Club." And what that means is each level has its own - and it's good to call them after names like that, where each level can be valued and valuable, but they're not gold, silver, and bronze, because that carries some negative connotation for people who are not in the top level.

The second thing is to think very careful about how you position the price points for those. Because in general, I think you should have as few people - here's an interesting thought. You should have as few people as possible in the club. And it's a bit if you think about an airplane having first class, business class, and economy class.

Most people are very happy in economy class. They might have paid between \$200 and \$500 for a ticket, but they kind of know what the deal is. If you move up to business class, a business class ticket quite often costs five to six times as much as an economy class ticket. But you don't get five or six times as much room. What you get is a little more attention and love from the people.

And if you move up to first class, there's maybe only four or five people there and you're getting a lot of love and attention, but you're paying perhaps 10 or 12 times as the people in economy. And actually, people at those much higher levels, what Jerry was calling the gold and silver -- but I really don't want you to call it that -- actually what they value is being part of a small group who is given a lot of individual attention from either the CEO or a donor manager and stuff like that.

So I'd encourage Jerry to think about having a small setting, a donor goal for the club, and then looking at how few people to have in the club. It's a very interesting, kind of counterintuitive area that's different from the rest of fundraising.

If you give me until tomorrow, I can attach another download about that, because I think super-clubs are really interesting. And if you think about airplanes, it gives you a very interesting insight into what people are prepared to pay for a certain level of attention because it's about attention, I think.

**Rebecca:** Excellent. That would be great for more information about that. And then I think this might be a great question to end the call with. It seems to summarize pretty well. This question comes from Pat, and Pat made a comment. "It seems like I need to be a psychologist to be a good fundraiser. What are your comments on that?"

**Bernard:** I agree.

**Rebecca:** [laughs]

**Bernard:** In a sense, I want to say - do I mean a good psychologist? To me, lots of the stuff, when I go back to the curious example I gave you about the three statements: Paris in the spring, a bird in the hand. It's not curious to read things and go, "Oh, I know what that says. I don't need to read it." And I think very often even fundraisers are very like that with donors. "Oh, I know what..." that kind of woman or that kind of businessperson or that kind of age group or that kind of faith group. "I know what those people are like."

For me, the issue is to be genuinely really curious about people, what's different and individual about them, and move away from the math, as far as you can, the math idea. And if you do that and are curious about people, the tools I'm offering are psychological tools, but these are things that really skillful people do anyway.

You probably have a friend - I don't know if you do, Rebecca - you probably have a friend. I certainly had a friend and university who was really popular with everyone. And I used to hate him because he was popular with everyone and I wasn't.

And when I met my friend Rory -- who's a real guy -- later in life, I realized that Rory did all these things that I do now, that I've learned, that I've taught myself. He did them all naturally when he was 12 or 14. And I had to learn to do them.

If you are the kind of person who is wonderfully able to be skillful and engaging and blah, blah, blah, without trying, then good luck to you. Bless you, you have a fabulous gift. If you're like the rest of world, you just have to practice at it in order to go on with - sometimes there's very difficult donors, or people who are donors who are not like you. Then, yeah, become a psychologist, if that's what it means. If that's the price to pay for the cause, then I'm prepared to pay the price, I guess.

**Rebecca:** Excellent. Bernard, thank you so much for joining us today. We're already getting a lot of positive feedback about today's presentation.

**Bernard:** Thank you.

**Rebecca:** So thank you.

**Bernard:** Thank you. And I hope this stuff helps. This is transforming the abilities of lots of organizations to genuinely -- I don't want to use the word "compete" -- but to genuinely be on an even base with everyone else. So good luck to all or your listeners. I hope they find the downloads useful. I hope to have a chance to work with you again soon.

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