

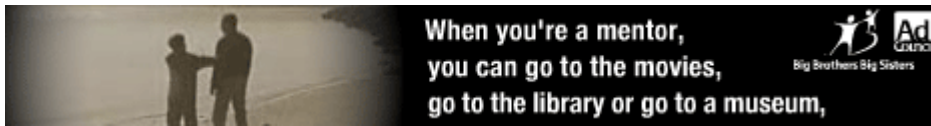


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## Today, I Am Prince Charming: How Role Playing Bolsters Major Gift Success

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### Article

#### [Today, I am Prince Charming: How Role Playing Bolsters Major Gift Success](#)

## Today, I am Prince Charming: How Role Playing Bolsters Major Gift Success

As the parent of a four-year-old I find I am cast in myriad roles throughout any given day. As I pretend to be a prince, kung fu master or dragon-loving Viking, I marvel at how my daughter incorporates my contributions into her grand drama. Later, what I said or did often resurfaces as she crafts new tales. This is the art of role playing in its purest form, an art that is as useful in my daughter's development as it is in the development of major gifts.

Whether a non-profit is just starting a major gift initiative or introducing a new board member to major gift solicitation, role playing can be a valuable tool in an organization's quiver. Why? It offers a safe way to prepare for the often intimidating "ask" while exploring the many nuances of major gift solicitation.

We all know that fundraising is about relationships, the stronger the better. Once your cultivation process has brought you to the point of making an ask, an easy, comfortable relationship can suddenly become daunting. What will the prince say or do? How will the kung fu master act in my presence?

Role playing is a way to prepare your solicitors—the CEO, Board Chair, major gift officer—for what comes next. It transforms the paper script into scenarios that prepare all involved for managing resistance, responding to different personality types and "calling an audible." It gives your solicitors confidence and ways to anticipate meeting outcomes.

### Act I—The Tool

So, how do you use role playing as a tool? First, decide how you want to incorporate it into your organization's major gift plan. A board retreat or development committee workshop offers the perfect setting for this type of training. Make sure there is enough room for small group interaction.

While it is certainly beneficial to watch or listen to a solicitation script, there is no greater training than having to act out the script yourself. I have watched plenty of Disney movies, but when I have to "be" the prince, I have to access a part of my brain and heart to be truly convincing. Role playing is most effective if each person involved in solicitation acts out a piece of the script.

Next, craft scripted scenarios based on individual donor solicitation plans. This will allow the scripted responses to be realistic and rooted in your knowledge of anticipated responses. It will also give the participants a more realistic experience as they play the part.

The next step will be to assign the roles. You will want everyone to play different parts in different scenarios. This helps people think outside of the box and get comfortable with not only their own roles, but those of others. It also helps the players identify with one another.

Once everyone has acted their parts, you will want the group to provide feedback. Team members should discuss what went well and what could be changed. You can also bring this feedback to the larger group for greater discussion and comparison. Another consideration is whether to tape the interaction for playback and self-evaluation?

## Act II—Prince Charming or a Frog?

So, today you are not Prince Charming but rather, let's say, the CEO of a prominent social service agency in your community. Was your performance worthy of a true prince or a frog?

Evaluating the role playing process can be tricky. You want to focus on relevant key factors rather than a person's flair for drama. A good script should include common "landmines" to increase everyone's comfort levels in dealing with and overcoming them.

Understanding a prospect's personality type and motivations for giving will help to prepare for most challenges. To help with this process, you may want to draw on the giving types outlined in the *Seven Faces of Philanthropy* by Russ A. Prince and Karen M. File.

For example, let's say your script has your CEO meeting with an "Investor" to request a six-figure gift to expand your facility and launch a new youth services program. Your "Investor" will be practical. She will want to know exactly how her gift will be used. She will ask questions to ensure that your organization has a well-constructed plan. With this knowledge you can design a script that includes some of the best ways to approach an "Investor" personality type for money.

## Act III—The Closing

Regardless of whether your participants are better suited on stage or in a child's playroom, the role playing process should give them a clearer understanding of what to expect on a major gift call. This should be a positive experience that allows them to face any fears they may have and put into their arsenal the tools they need to be confident, effective solicitors for your organization.

As a famous cartoon kung fu master taught me and my daughter, confidence can take you anywhere you want to go. And, while you may need to kiss a few frogs to get there, Prince Charming does await with the gifts you need to get your organization to its "happily ever after."

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