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INFLUENCE—WHAT IT IS AND WHY YOU NEED IT IN YOUR FUNDRAISING

Influence is a special kind of communication skill you probably already have. But it's a skill that you can, and must, improve to be the outstanding fundraiser your cause needs.

In this chapter we'll

- Explore how you and your improved communication can be critical to your organization's success
- Explain why high-level influence skills are particularly relevant and important to fundraisers and fundraising *now*

Our straightforward definition will help you understand exactly what influence is and what its key elements are. Arising from this definition are three implications. We identify how, if you work through these implications, you'll have *long-term* rather than *short-term* payoffs.

Finally, we help you understand the two main reasons why attempts at fundraising influence so often fail—and how our tried-and-tested 5Ps framework can help.

You Are the Success Secret!

Here are some typical fundraising challenges you might identify with. You're a committed, intelligent fundraiser working hard to secure resources for your organization and its important work. You accept the reality that you don't have the biggest marketing budget, or the most-recognized brand, or the best donor list, or the best board, or maybe even the "easiest-to-explain" cause. But you also accept that there's no point in complaining about the unfairness of it all—and you recognize that you have to raise funds in competition with organizations that may have those budgets, brands, donors, boards, and causes.

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So if the question is, “How can I succeed in the competition for funds and what’s my organization’s success secret?” we believe the answer is *you*. Specifically, it’s your ability to communicate your cause in a way that persuades donors and others to take action and offer you support. The competitive edge is your *ability to influence*. This book is about developing and improving that competitive edge so that you become a powerful and effective influencer.

Why Influence Now?

You could argue that fundraising has always been about influence. And in many ways that’s true. But there are three pressing reasons why influence is a more important skill than it has ever been:

- First, today’s donors and supporters are more sophisticated and demanding. So our grasp of techniques for persuasion also needs to be more sophisticated and targeted. It’s not enough anymore just to ask people to help “the poor” or “the sick,” or “the lame.” Today’s donors want to feel they are making informed choices and definite impacts, which means they demand better communication. But they don’t necessarily want *more* information. They want it faster and in a way that they can readily understand. That puts extra pressure on us to deliver. *Influence skills can help us provide information to donors in a targeted and appropriate way to secure the result we need.*
- Second, we’re all aware of the *negative* publicity certain types of mass fundraising are getting—wasteful direct mail, intrusive telephone fundraising, and spam-like e-mail and viral approaches are all attracting significant criticism. (Whoever thought *viral* marketing was a good name? Since when have viruses been thought of as something good?) As donors we don’t want to feel we’re part of a mass-marketing initiative. We want to feel special and important. So we like communications that are obviously about us and

involve and engage us—but not in a way that just looks like a search-and-replace-key-field-in-a-database. Increasingly, there's a higher value placed on one-to-one and person-to-person contact, or at least what *feels* like such contact. *Even if we're making one of fifty phone calls we should be able to change and adapt a basic message, using influence skills, to make the individuals we're contacting feel important and valued.*

- Third, influence skills can help you engage an exceptional individual donor in a way that enables him or her to make a transformational gift to your cause. The reality is there are now more wealthy people in the world than there have ever been.¹ And the great news for fundraisers is that more of these wealthy people are philanthropic. Okay, we won't all meet the megagivers like Bill Gates, Ingvar Kamprad, Mo Ibrahim, Tom Hunter, or Carlos Slim at the dinner table. (If you only recognize Bill in this list, try Googling the others. Wealth and philanthropy are worldwide phenomena.) But we can and do meet people all the time who could make an exceptional gift. If you are introduced to potential high-value donors—whether it's Ingvar Kamprad or a local furniture store owner who wants to “give something back”—they'll want to deal with you one-to-one. *It's in these one-to-one very-high-payoff situations that you'll also need access to influence skills to engage and enthuse the megadonor.*



The Poor Will Always Be with Us — And the Rich

The U.S. Council on Foundations' projections are that we'll witness no less than \$41 trillion in asset transfer by the middle of this century in the United States. At least

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\$6 trillion of this will be for charitable giving. One result is that upward of \$300 billion will be available in annual foundation giving alone.

The implication for fundraisers worldwide is that there are increasing opportunities for fundraising for exceptional gifts.

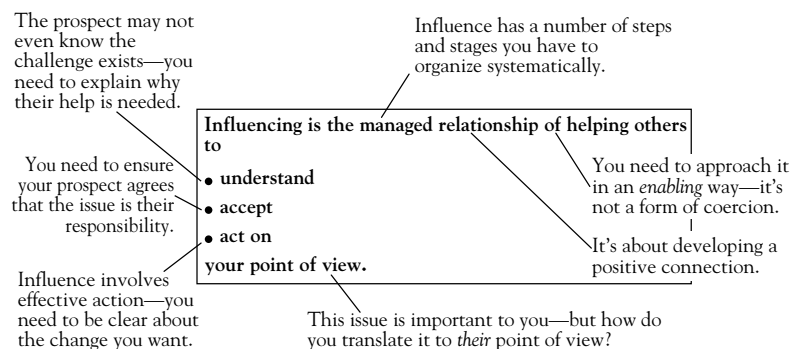
(Statistics taken from a speech by Steve Gunderson—the Council’s president—presented at the annual conference of the National Association of State Charity Officials (NASCO), October 2006.)

Defining Influence

So we know why we might want to influence. But before we explore *how* we influence we need to define *what influencing is*. There are a number of definitions. Our own definition—which has proved useful to clients and others we’ve worked with—is shown in Figure 1.1.

As you can see from the notes accompanying the main definition, simple doesn’t mean simplistic. The key ideas in this definition will become important later in the book as you develop your understanding of influence. Let’s look at them in more detail.

Figure 1.1 Definition of Influencing



- *Managed relationship*: To achieve a specific outcome with an individual or group, you need to be clear on the result you want *and* have a flexible plan about how to achieve it. The book explores how to develop a specific kind of relationship.
- *Helping others*: Influence is different from negotiation² or coercion.³ In influence you're trying to help someone change their mind or to come around to your point of view. Your prospect or donor should never feel manipulated. Much of the book stresses the different ways you can help people to *choose* to change their minds.
- *Understand, accept, and act*: Successful influence has to have these three elements. We want people to really *know* what the challenge is, *agree* that they have a responsibility to tackle it, and finally *do* something concrete. We don't want them just to think about it! The book emphasizes the importance of *action*—especially when the first response you get is a “No.”
- *Points of view*: Throughout the book we reinforce a key issue—the way we see the world or feel about issues may not be the same for others. The really skillful influencer begins by being curious about people and framing ideas in a way that will help individuals or groups change their minds. We offer you ways to gain that skill.

Try to keep this definition, and the elements embedded in it, in your mind as you work through the book.

Why We Sometimes Can't Influence

Why do so many fundraisers go wrong in their attempts to influence? In our experience there are two common challenges.

The first is that there's a lot of *mechanistic thinking and advice about fundraising*—an emphasis on the one “right” way to write a case; or specific, almost ritual, sequences of “moves” management

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to engage donors; or certainty on the five key questions to ask at meetings; or even the ten “power” words “guaranteed” to close the donation deal.

Much of this approach is drawn from old-fashioned sales techniques that, although not necessarily bad in themselves, are often crudely applied as though donors were some kind of lab rats. The reality is that much of this approach just doesn’t work any more—contemporary donors and supporters are more sophisticated and demanding in what messages they accept or reject.

The second is that *many fundraisers make incorrect or inappropriate assumptions about the beliefs and behaviors of others*. This then leads those fundraisers to draw the wrong conclusion about how the donor will respond to a specific technique or approach. (“I was sure she’d be moved by the photos—how could anyone not be? Why then didn’t she make a donation?” Our misguided fundraiser assumes that *because a donor is socially concerned, she’ll want to support their cause, and the photos will trigger this response.*)

Other examples of this “assumption-laden” thinking we’ve heard include the following:

- “I know you’re an older person and concerned about the environment. We’re an environmental charity, so please remember us in your will.”
- “I know you care about young people and their education. We work with children with behavioral problems. Your \$10 can help stop children from missing school.”

Our experience is that fundraisers approach influence this way because they don’t have the tools to adapt their own thinking and frame it in a way that is useful to others. The donor often says “No” *because* the fundraiser’s “obvious” logic, sadly, isn’t always theirs. This book is designed to help you as a fundraiser to understand *why* people don’t always act “logically” and to show you how to take donors through the influence process

successfully. That way you get the behavior or action that you're looking for—you achieve *influence*.

People Are “Messy”—So Is Influence

There isn't an easy approach to influence in fundraising or any other type of influence. Our experience is that it's complex and messy—largely because the human race is complex and messy. Unlike computers, people are not always predictable. Some donors, in fact, can appear downright “weird” to us. (The assumption is always that *we* are normal.) Their unpredictability is what makes our relationships with donors, and people in general, fun and passionate—and frustrating and puzzling. And because relationships in general are like that, the influence process is also fun and passionate—and frustrating and puzzling. As a result of our experience, we felt we needed an influence model that reflected this “messy” reality.

Note that we're not saying you should bombard a prospective donor with every technique in this book until you find one that works or they give in. We *are* saying that you need to plan your process carefully and build flexibility into it to deal with the “messiness” that will be inherent. It is a relationship after all.

Use the 5Ps Framework—But Use It All!

We've written this book from the vantage point of having used the 5Ps framework with individuals from many leading nonprofit organizations on both sides of the Atlantic. As a result, we can point to a significant body of success for this approach. If you use the framework—and use it systematically—we're confident that you too will be more successful, both in winning people over to your cause and in obtaining bigger and more donations.

There's just one proviso in our confidence. You need to take the time to work through the *whole* framework. You might be

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tempted to skip the foundations and dive ahead to the exciting and clever psychological and interpersonal techniques. There's lots of interesting and challenging material there. But it only works if you have a solid underpinning on which to base it.

Finally, with power comes some ethical considerations. The skills and techniques we share here *are* powerful. They build, as we've said, on natural processes and aspects of human relationships. They have been used by successful and ethical fundraisers in the past. And we'd like *you* to carry on using them in that spirit. We ask only that you consistently ensure you follow two rules.

- *Use these techniques where they fit with your values.*

Persuading your elderly aunt to loan you more money than she can really afford might be in your interests but probably doesn't fit with your values. Likewise, you need to judge which techniques fit with your values in fundraising terms.

- *Use these techniques with consideration for the donor's values.*

A key part of ethics and stewardship is to consider the interests of the other person—donor, colleague, and volunteer. If you feel like you're manipulating someone, then you probably are. So stop whatever you're doing.

Summary

Fundraising can seem unfair if you work for a smaller, less well-resourced, less well-known or harder-to-sell cause. The bad news is that fundraising is unfair. But there is good news too: you have the potential to be your organization's single biggest competitive advantage. And by improving your influence skills you can become a fabulous advantage.

Influence has always been an essential part of fundraising, but now there are pressing reasons to improve your skills. These

include the negative publicity given to some mass-marketing techniques, the need to respond to the sophistication and demands of donors, and finally the growth in the number of individuals who can make a significant gift if approached sensitively.

You'll be most effective if you have a real understanding of what influence is and how it works. A key proposition at the center of our approach is that other people don't necessarily share your way of thinking or making decisions. This might have to do with values, or communication styles, or psychology, or age, or culture. To be successful you need to be able both to recognize differences and to be flexible in adapting to them.

Successful influence is not about the simplistic and mechanistic "moves management" approach endorsed by some agencies and consultants. Nor is it any longer good enough to rely on the old-fashioned "just write a good case statement and share it" school of philanthropic purity. Although these approaches sometimes work *despite* themselves, if your cause is important we believe you should use the best techniques you can.

Influence—and especially the use of sophisticated psychological techniques—involves ethical considerations. These should form part of your stewardship commitment.

At its best, fundraising influence should be about a *win-win-win*:

Win: You secure the help and resources you need.

Win: The donor feels they're engaged and contributing.

Win: Your beneficiaries or cause get the result they need.

In the next chapter we begin to explore in real depth the 5Ps framework. This will guide you through influence situations. It will help you shape your message, identify likely challenges, and establish the key action that's needed. The 5Ps of Influence are

1. Passion: identifying what you want and why it's important
2. Proposal: shaping your idea in a way that's compelling

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3. Preparation: organizing your ideas and thinking
4. Persuasion: using psychology to frame your influence messages
5. Persistence: dealing with challenges and objections

Chapter Two explores how to adopt the first of these stages—to shape your ideas, your *passion*—in a purposeful and practical way.

Notes

1. Philanthropy is even a hot media topic, if not quite the new rock and roll. In 2006 *Time* magazine honored Bill and Melinda Gates as “People of the Year.” In the same year *The Economist* twice featured philanthropy on its cover, and *Fortune* magazine had a cover with former president Clinton and the words, “The Power of Philanthropy.”
2. Usually in negotiation both sides have to compromise on something—such as the price of a service—to achieve a result. If you can’t reach a compromise then the negotiation fails.
3. You’re not trying to coerce someone when you influence—they have to *choose* to support you.