



Expert Fundraisers Are Made, Not Born — And Here's How

By Kenna Barrett, Ph.D

What makes an expert fundraiser? Psychologist K. Anders Ericsson coined the phrase “deliberate practice” to explain how people acquired expertise, and while there’s nuance in today’s science of expertise, the most inspirational takeaway from Ericsson’s work is that experts are made, not born.

The making of an expert involves intentional repetition and feedback. While frontline fundraisers do get lots of repetition (on visits!), they get little structured feedback. All too often, a new fundraiser tags along with a senior leader for a day before being handed a list of prospects of their own. Development professionals are rarely observed in action by a seasoned professional. This lack of coaching is astonishing considering the immense pressure on frontline fundraisers to deliver.

Deliberate practices in fundraising include my favorite: the role play. This proven technique (some 89% of advanced selling courses use role plays) is underutilized in fundraising. Role play simulations are cost effective and can be designed as reflective learning opportunities rather than high-stakes evaluations.

Role plays leave plenty of room for ingenuity, but these tips will foster a comfortable, dare I say fun, environment. They are designed for managers to make this feel like learning, not judgment. If you’re a one-person shop — pair up with a friend, colleague or family member. I’ve recorded myself from my phone — you’ll be surprised what you learn that way!

Select Some Mini-Scenarios To Workshop

Aim for 20 to 30 minutes of role play, max. You want this to become a regular part of your meetings together, not a grind or snoozefest. If your team needs practice selling institutional priorities, for example, workshop the question — “What’s your top priority?” Or, workshop how to address common objections, such as, “I’ll have to check with my spouse” or “This isn’t good timing.” Choose one shared prompt, and then let staff bring their own prospect puzzles to the table.

In my fundraising course, I create a fictional organization and donor. We run through three points of interaction: the opening phone call (less fashionable, I know, but everyone should know how to handle “the phone”), the get-to-know conversation and the ask. We do an easy scenario first with a cooperative donor, and then a tricky scenario where the “donor” provides some objections. I promise you, we end up laughing!

As the Leader, Go First

Leaders: be vulnerable. Once you’ve chosen your workshop scenario, kick off things by doing the first run-through. Perhaps in the above example about institutional priorities, you give your pitch about the \$10,000 priority. Then divide your teams into pairs and have them take turns playing donor and gift officer. After several minutes, bring the group together and invite reflections.

Often, teams realize they need better shared talking points, which may lead to productive white-board sessions.

Provide Actionable Feedback

Observe the partner dialogues and point out where each team member excelled. You might say, “Notice what Cristina did when I said I wasn’t available. She didn’t just hang up, she asked, ‘When would be a good timeframe to call back?’”

Then, point to an aspect you think can be improved. "I was engaged when you shared Brett's story, but my mind started to wander when you shifted to the capital campaign. Maybe you can use the anecdote about Brett to illustrate the need for the campaign."

The goal: Help your team craft emotionally compelling storylines that get listeners motivated.

Remember, Practice (Not Watching) Makes Perfect

Even though a gift conversation is not a speech, fundraising involves a bit of oratory, and you want to commit key words and phrases to memory. When someone lands a stellar turn of phrase, write it down and incorporate it into your talking points. Aim to build the kind of automaticity that will enable you to communicate with ease.

Think about all the skills the expert fundraiser has internalized. When a donor asks about an endowment threshold, an experienced fundraiser replies "\$25,000," drawing on factual, declarative memory. Not stopping there, the fundraiser goes on to pose follow-up questions that guide the donor to a gift, drawing on a more instinctive form of knowing how. Helping your team members internalize their pitch will build their know-how.

Can role play benefit those who are already experts? Yes! Ericsson found that we all get rusty, and this can happen to fundraisers who shift from road warriors to managers. But if you do have folks who really shine on the road, pair them with a new gift officer.

Good luck — and get (role) playing!

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