

We always say that in Planned Giving, people skills are far more important than technical skills. Why? Because people give to people, not to institutions.

Yet sometimes, even the most socially adept among us need a little help to get the conversation started. That's why we've developed these 15 conversation starters. Use them the next time you meet with a donor or prospect. They'll help break the ice, establish trust, and get you started on the path to building a meaningful, mutually beneficial relationship.

## Are you named after someone in your family?

1

This will give you a glimpse into the donor's family life, and give them a chance to talk about someone who may have been important to them. Side note: Be sure to write your donor's name down, and ask for the correct spelling.

## Where did you grow up?

2

This will give you a glimpse into the donor's family life, and give them a chance to talk about someone who may have been important to them. Side note: Be sure to write your donor's name down, and ask for the correct spelling.

## What is the biggest change you've seen in your lifetime?

3

This is an especially poignant question for older donors, but we've all seen something that's affected us and our outlook on life.

## Who knows you better than anyone else, and why?

4

This can show you who made a difference in your donor's life; who's truly important to them.

## Do you or your family have any favorite traditions?

5

This question will give you some insight into the most important events and people in your donor's life.

## What are you reading? What is your favorite book/who is your favorite author?

6

This is a great question for folks who love to read, and their answers can reveal a lot about their personality and what's important to them. If they're not readers, that's OK—you just learned something else about them.

## What do you like to do to relax?

7

Believe it or not, this question can reveal a lot about your donor. You can learn whether they're a workaholic, if they enjoy getting outdoors, the arts, sitcoms, sports ....

## If you could change one thing about (situation that affects world, mission, etc.), what would it be?

8

By finding out what your donor values, you can find out how to help them create a legacy.

## What keeps you awake at night?

9

You might get the same answer as above, or you might learn something new.

## What drew you to (your organization)?

10

Good stewardship starts with finding out what's important to the donor or prospect, and why they might want to help your organization.

## How do you view your financial future as you age?

12

This will help the donor focus on the three finance "buckets": needs (needed to survive), wants (something useful or lacking, but not necessary), and desires (more like a goal). As each bucket fills, the runoff flows to the next bucket. Find out which bucket the donor's philanthropy falls into—wants, or desires.

## "Would you rather" questions. For instance, "Would you rather vacation in the mountains, or on the beach, and why?"

13

This off-beat question can reveal a little more about your donor's personality.

## What's the most important value you think people should hold? Honesty, kindness, empathy, integrity, something else?

14

This is an opportunity for your donor to tell you exactly what they value.

## What do you want to be remembered for? What do you want your legacy to be?

15

This will help your donor decide how they want to invest in their legacy.