

HOW TO HAVE YOUR FIRST MAJOR DONOR CONVERSATION

Five simple steps to move from small talk to something meaningful - without it feeling like a pitch.

FOLLOW THESE STEPS

- 1 Choose curiosity over agenda**
Go in with questions, not a plan to impress. The goal of the first conversation is to listen, not to present. Ask what drew them to your cause originally and let them talk.
- 2 Ask about their values, not their wealth**
"What does giving mean to you?" or "What kind of impact do you most want to have?" These questions reveal far more than any research and make the donor feel seen, not sized up.
- 3 Share one story, not your whole strategy**
If you get the chance to speak about your work, go specific. One real person, one real outcome. Major donors give to impact they can picture not to strategic plans they have to decode.
- 4 Find the overlap and name it**
Listen for the moment their values and your mission connect, then reflect it back. "It sounds like unrestricted, long-term change is what matters most to you, that's exactly what we're working toward."
- 5 Close with a next step, not an ask**
End by suggesting a natural follow-up. A site visit, an introduction to a program lead, a relevant report. Keep the momentum without any pressure. The ask comes later, relationship comes first.

Remember this

Major donors don't just give to organisations. They give to people they trust with a vision they believe in. The first conversation isn't a step toward the gift, it is the gift of their time. Treat it that way.