South Dakota Association of Fundraising Professionals

Communicating More Effectively with Donors through Behavioral Styles

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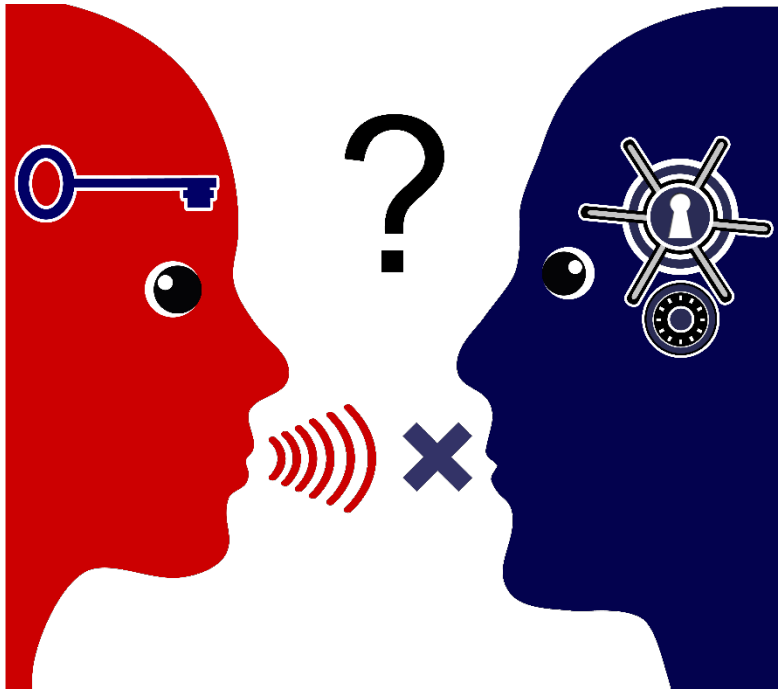
Approaching the Prospective Donor

- How do you best gain their attention
- How do you relate to them
- How do you engage them
- How do you genuinely connect with them

A Difference in Social Style

Failure to understand social styles can cause **frustration, resentment, and loss of donations.**

Understanding styles leads to better communication

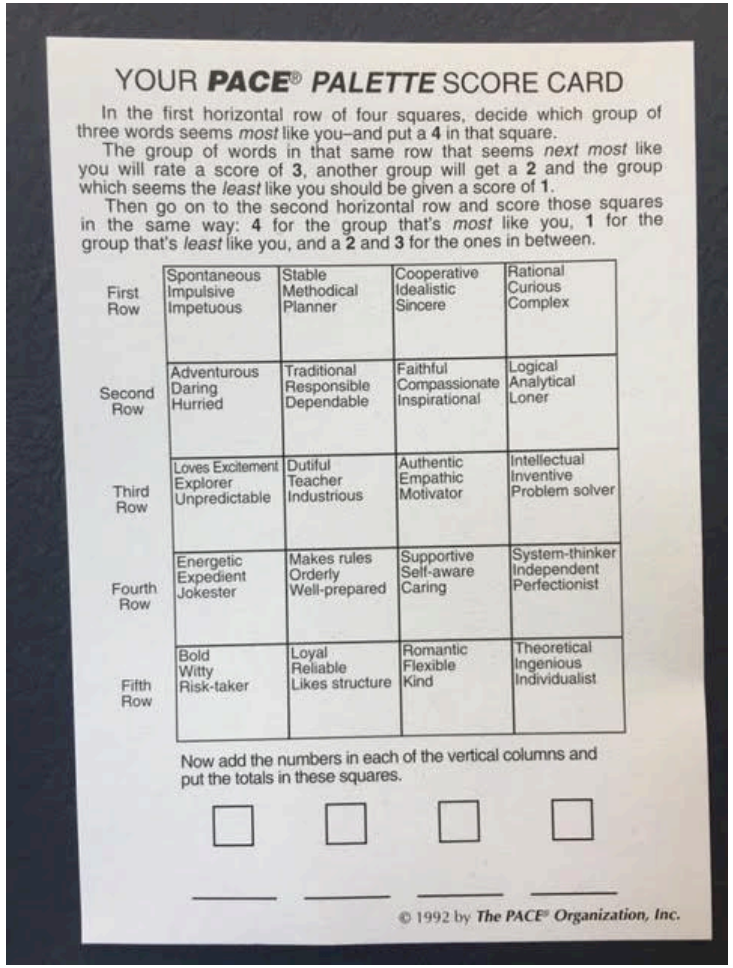


Success and Behavioral Styles

"How can I seek donations in a way that demonstrates respect for the donor, builds credibility for myself and my organization, and sets up a winning situation for both of us?"

The Platinum Rule

Taking the Pace Palette test



YOUR **PACE**® *PALETTE* SCORE CARD

In the first horizontal row of four squares, decide which group of three words seems *most* like you–and put a **4** in that square.

The group of words in that same row that seems *next most* like you will rate a score of **3**, another group will get a **2** and the group which seems the *least* like you should be given a score of **1**.

Then go on to the second horizontal row and score those squares in the same way: **4** for the group that's *most* like you, **1** for the group that's *least* like you, and a **2** and **3** for the ones in between.

First Row	Spontaneous Impulsive Impetuous	Stable Methodical Planner	Cooperative Idealistic Sincere	Rational Curious Complex
Second Row	Adventurous Daring Hurried	Traditional Responsible Dependable	Faithful Compassionate Inspirational	Logical Analytical Loner
Third Row	Loves Excitement Explorer Unpredictable	Dutiful Teacher Industrious	Authentic Empathic Motivator	Intellectual Inventive Problem solver
Fourth Row	Energetic Expedient Jokester	Makes rules Orderly Well-prepared	Supportive Self-aware Caring	System-thinker Independent Perfectionist
Fifth Row	Bold Witty Risk-taker	Loyal Reliable Likes structure	Romantic Flexible Kind	Theoretical Ingenious Individualist

Now add the numbers in each of the vertical columns and put the totals in these squares.

☐ ☐ ☐ ☐

_____ _____ _____ _____

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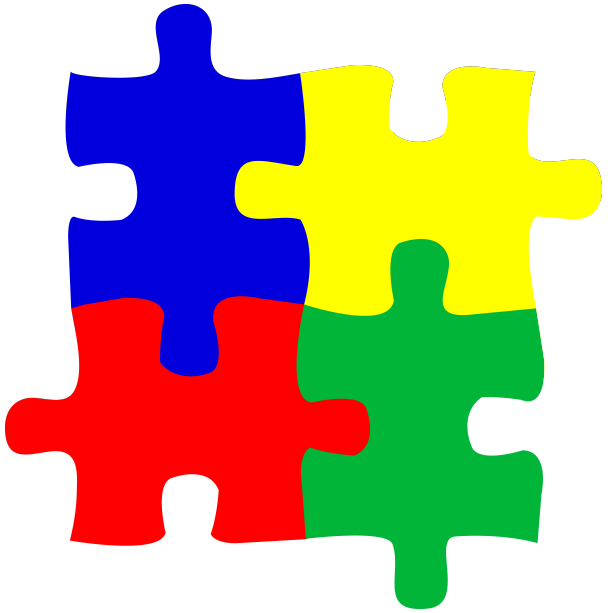
What Color Are YOU?

- RED
- YELLOW
- BLUE
- GREEN



What are your …

- JOYS
- VALUES
- STRENGTHS

What are your …

- IRRITATIONS
- AGGRAVATORS
- STRESSORS

REDS

REDS

Adventure/Spontaneous

- Variety is their spice of life
- Hold other people to the rules but it is OK if they break them
- Naturally competitive
- Cluttered and informal office - like to display their trophies
- May dress boldly

When Communicating with a RED

- Get to the point quickly
- Give the bottom line first
- Give immediate benefits

REDS

- Responsibilities to include challenges and competition
- Assignments to think “outside the box”
- Tasks with definite completion
- Positions of leadership
- As few rules as possible :)

Questions for donors who are REDS:

1. Do you see the significant impact you could have right away by making this gift?

2. Which part of this giving opportunity are you most excited about and why?

3. Do you have enough information needed to proceed with making this gift NOW (or in the immediate future?)

4. What would you like to happen first?

Who are REDS? (40%)

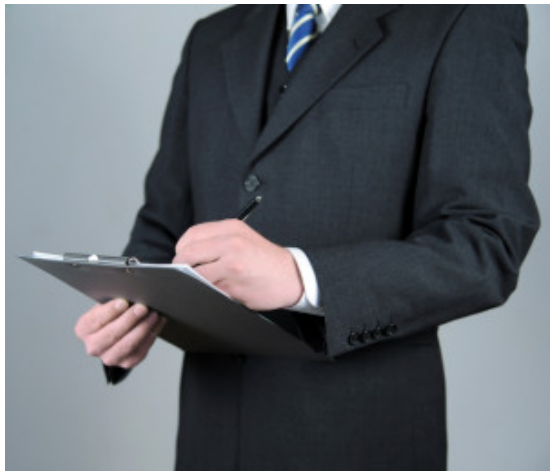
- Donald Trump
- Indiana Jones
- Jim Carrey
- Mel Gibson
- Presidents Kennedy and Clinton
- Road Runner

YELLOWS

YELLOWS

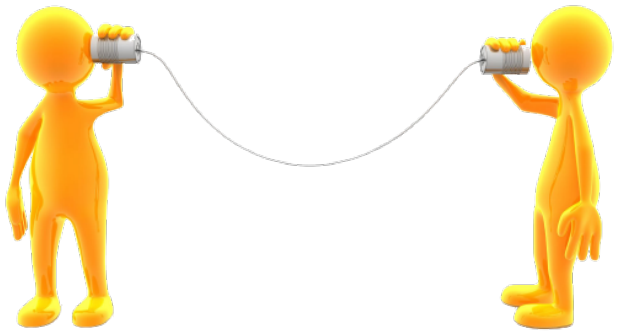
Responsible/Structure

- Balance out the REDS (opposite)
- Great respect for work ethic
- Status Quo
- Rule followers
- Will resist change



When Communicating with a YELLOW

- Use businesslike approach
- Be clear, direct and organized
- Use references and referrals



YELLOWS

Responsibilities which include:

- Organization and attention to detail
- Assignments to follow up with team members
- Positions which acknowledge loyalty and honesty
- Opportunity to make rules for the team

Questions for donors who are YELLOWS:

1. Do you have all the details you need in order to proceed with this gift?
2. How does this giving opportunity fit in within your long term plans?
3. Do you already have an idea what you will be telling others to do? Who first and why?
4. Do you see how this can benefit your financial giving goals? How?
5. Can you recognize the value of giving to this program?

Who are YELLOWS? (40%)

- Hilary Clinton
- Donald Rumsfeld
- Presidents: Washington, Nixon, Ford, Carter, George Bush and George W. Bush
- Most Presidents have been yellow!

BLUES

When Communicating with a BLUE

- Present ideas as people related
- Avoid conflict
- Create a team environment

BLUES

Responsibilities which include:

- Motivating and building RELATIONSHIPS
- Assignments which add fun and enthusiasm to team
- Tasks which involve human interaction
- Positions which involve determining equity
- Opportunities to use communication skills

Questions for donors who are BLUES:

1. Have you gotten a feel for how impactful this will be?
2. What do you feel your family/friends will love about this gift opportunity the most?
3. What do you feel will be the most impactful from this gift?
4. Can you feel how this gift will directly change people's lives?
5. How will this gift make a difference in the lives of others? In your life?

Who are BLUES? (15%)

- Mahatma Gandhi
- Charles Schultz
- Snoopy
- Jim Hanson (Creator of Muppets)
- Eleanor Roosevelt
- Never has been a BLUE President!

GREENS

GREENS

Curiosity/logic

- Want to look at all the possibilities
- Seek wisdom – they want to make a contribution that **makes sense**
- Like to analyze data
- Rules have to be logical
- Will ask the most questions

When Communicating with a GREEN

- Be logical and factual
- Be ready to prove yourself
- Ask for their help to find the solution

GREENS

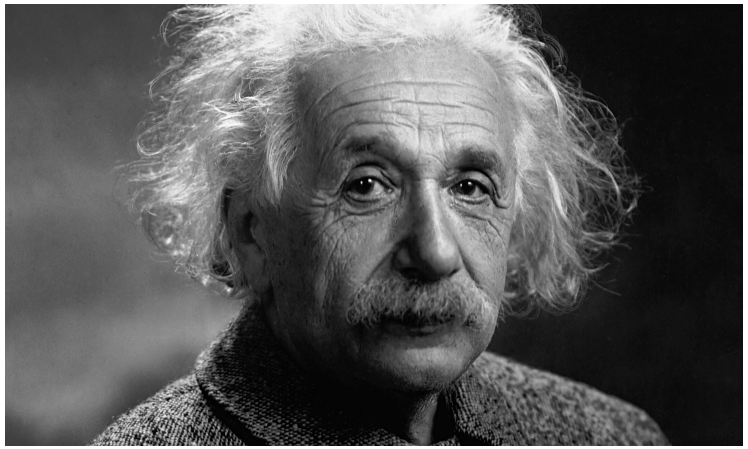
Responsibilities which include:

- Analyzing data
- Assignments to find a better more logical way
- Tasks which provide a mental challenge
- Positions which will allow working independently
- Opportunities to speak objectively in a group

Questions for donors who are GREENS:

1. Do you see the logic in making this gift?
2. Does making this gift make sense to you? Does it fit strategically within your overall financial goals/strategies?
3. Do you have all the information you need in order to proceed with going forward in making this gift?
4. What/if any information are we omitting?
5. Do you know the next steps you will take in order to complete making this gift?
6. What is the decision process for moving ahead with this type of gift?

Who are GREENS? (5%)



- Albert Einstein
- Alan Greenspan
- Mr. Spock
- Sherlock Holmes
- Presidents Jefferson and Lincoln

We just met - how do I know your color?

REDS - will be self-confident and open in a casual way - will talk about personal accomplishments, sports, their next adventure

YELLOWS - will be self confident in a formal way - conservatively dressed in business clothes - might wear a lapel pin - will be proper and mannerly

BLUES - are less assertive and dress comfortably in colorful clothes - are casual and full of warmth, genuinely interested in you and speaks in terms of feelings

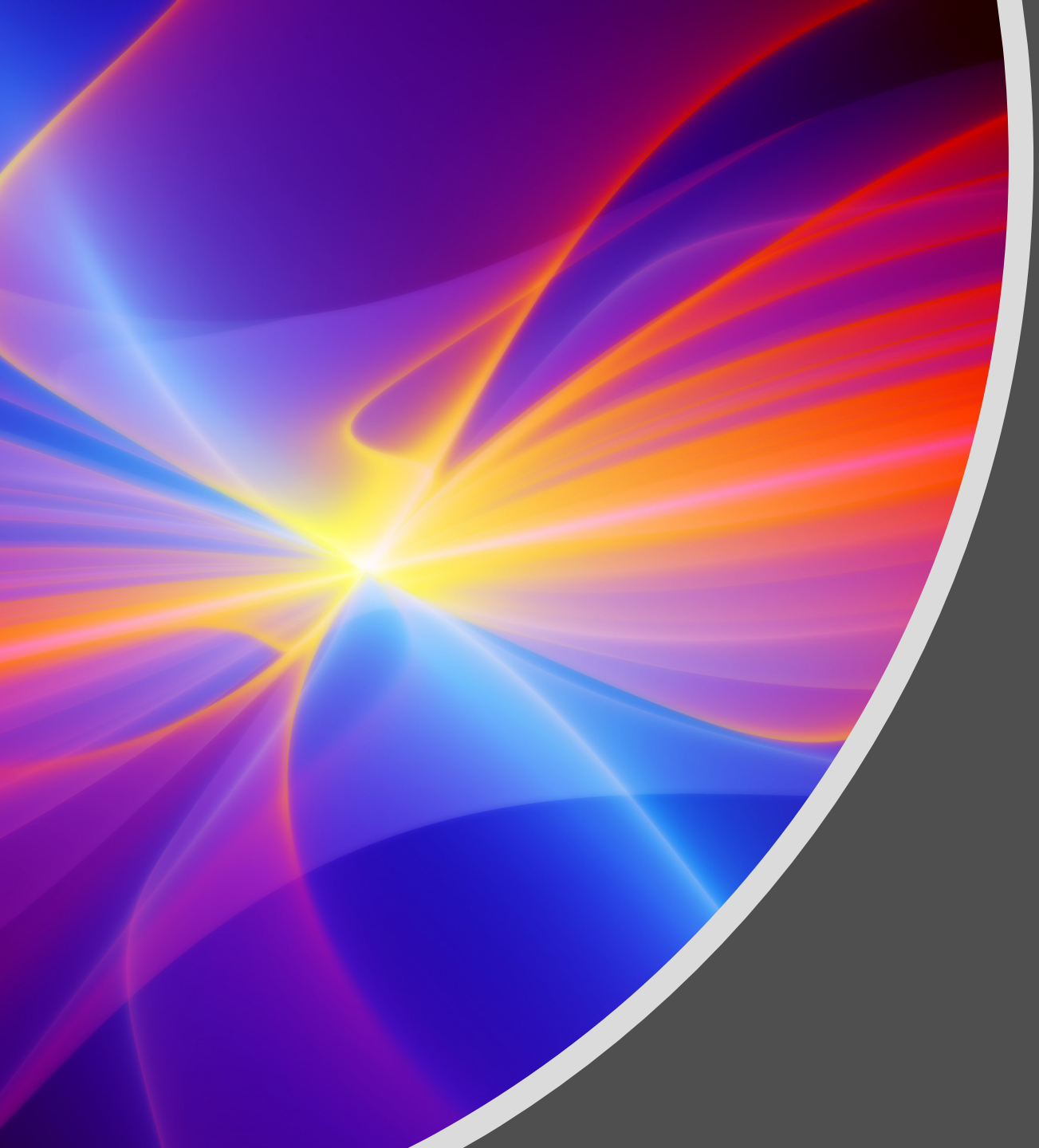
GREENS - will be less assertive and may even seem standoffish - more formal, dress individualistically and generally in subdued colors and will speak in terms of "thinking"

Reading the Prospect's Environment

Notice the Prospect's Surroundings

- Office decorations and how things are arranged
- Furniture
- Pictures, diplomas, awards

Being able to identify a social style does not provide a crystal ball that predicts a prospect's every action, but it does provide a basis for forming reasonable expectations about recurring behavior.



Thank you for your time today!

Best wishes for a more COLORFUL day!

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