



The *Courageous* Donor Conversation

How to prepare for, navigate, and follow-up on tricky donor moments.



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hello

I'm Mallory Erickson

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Conversations

Move Missions



Prompts

Move Missions



Behaviors

Move Missions

These are not the same thing:

1

SKILLS

2

READINESS

Donor behavior

has patterns we
might not realize.



**When a donor conversation
doesn't move forward,
what's usually missing?**

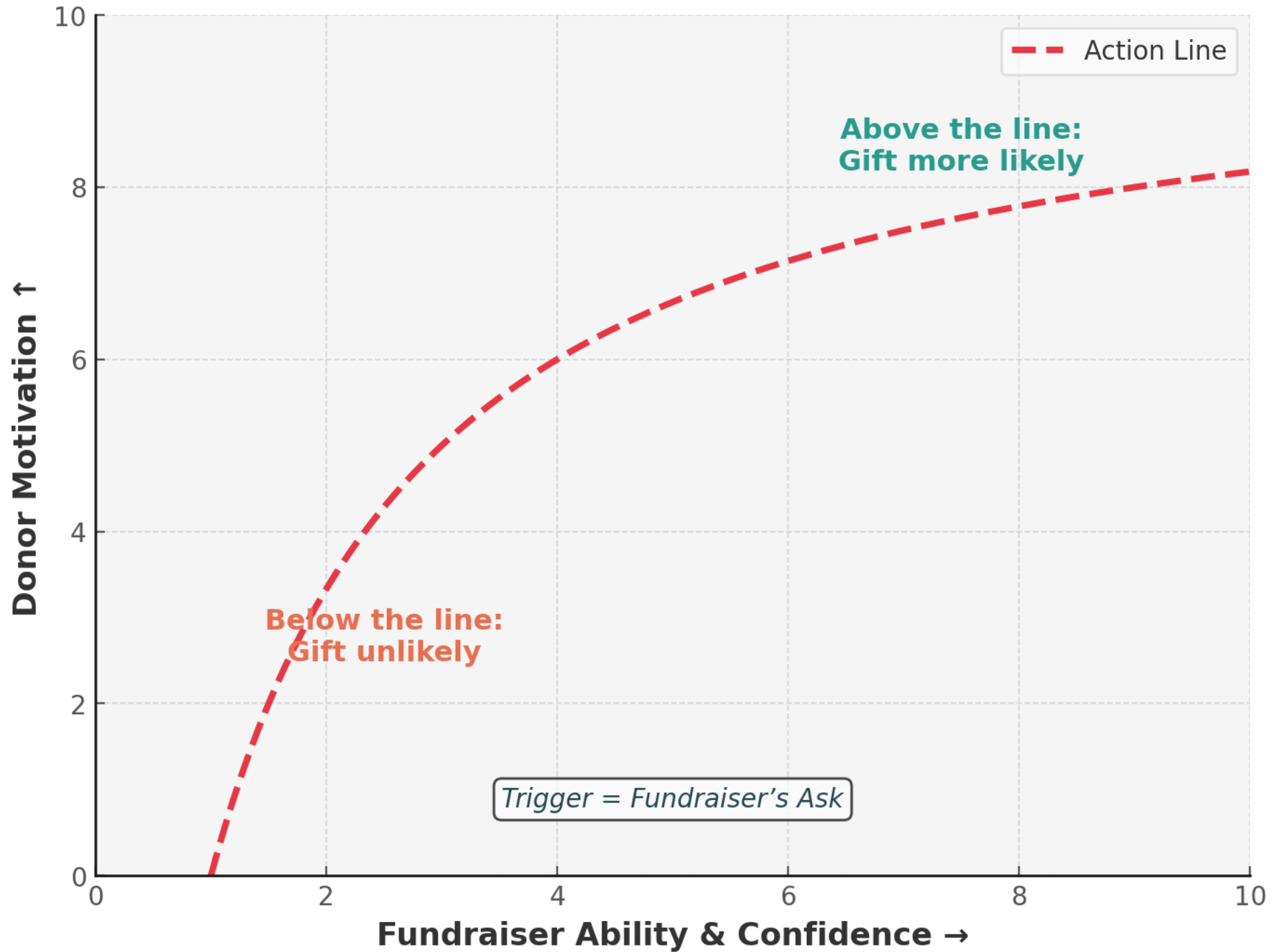
What causes behavior change?

In the Fogg's Behavioral Model, three elements must converge in order for a behavior to occur.

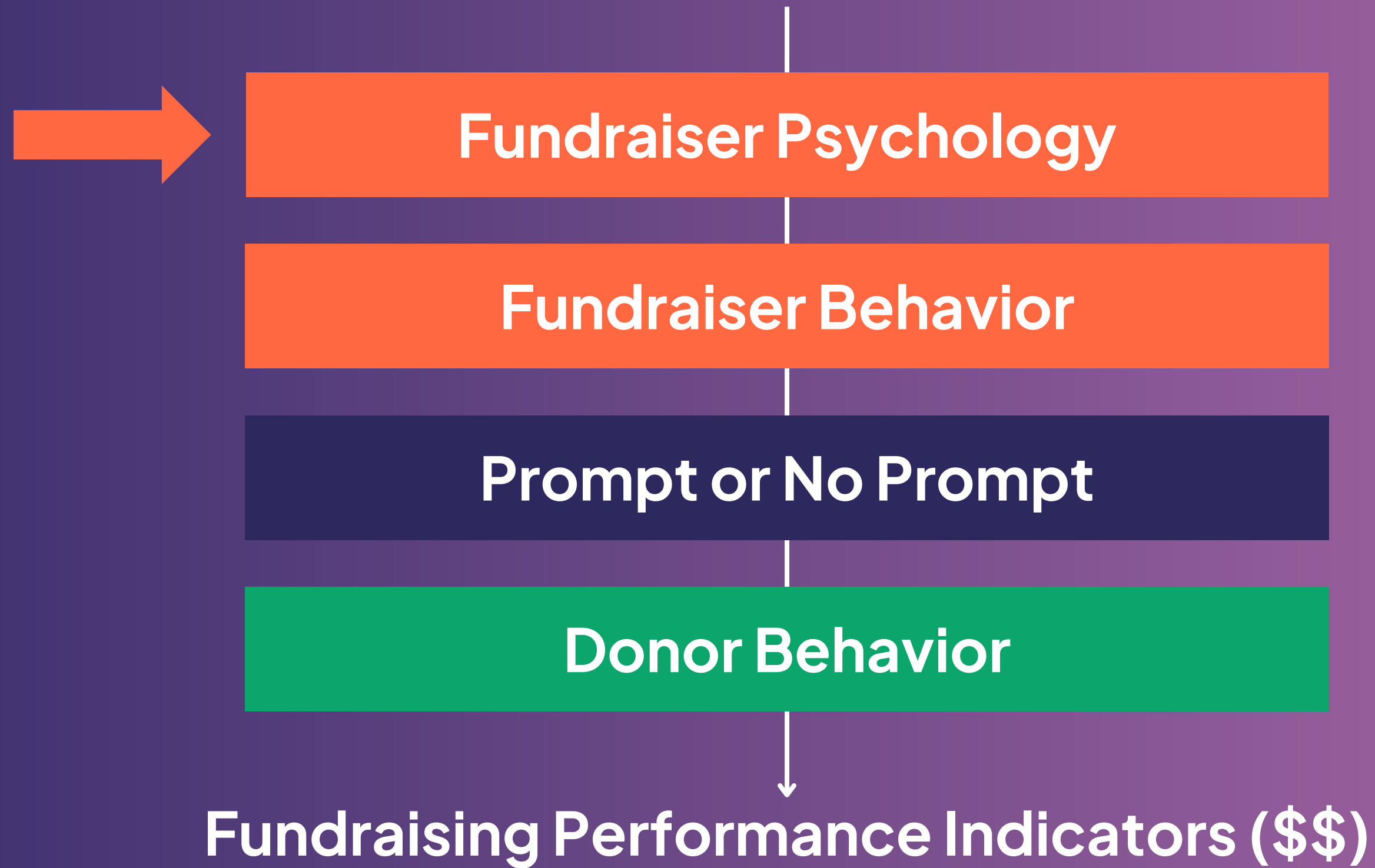
- Motivation
- Ability
- Prompt



Fogg Behavior Model - Fundraising Lens



Donor Behavior is a RESPONSE



How we measure fundraiser behavior:

Communication & Delivery Skills ^

You maintained a friendly, conversational tone and adapted smoothly when the donor's identity was unclear. Your transitions were mostly natural, though some moments could be tightened for clarity and flow.

- Confidence Strong Reach >
- Structure/Flow/Transitions Getting a Grip >
- Balance & Quality of Dialogue Strong Reach >
- Defined Next Step Tivy-Level Talent >

Fundraising-Specific Skills ^

You connected Taylor's giving to specific impact, explored their motivations, and framed the visit as a stewardship opportunity. Some value articulation and alignment framing could be deepened for greater resonance.

- Clarity of Purpose and Goal Alignment Strong Reach >
- Relevance to Funder's Interests Strong Reach >
- Ask Effectiveness Getting a Grip >
- Vision & Value Articulation Strong Reach >

Relationship Building ^

You built rapport by affirming Taylor's motivations, expressing gratitude, and inviting them into the organization's community. Trust-building was strong, though relational depth could be enhanced with more personal connection.

- Donor Engagement Score Tivy-Level Talent >
- Relational Depth Score Strong Reach >
- Trust Building Effectiveness Tivy-Level Talent >
- Active Listening Strong Reach >

Strategic Thinking ^

You adapted quickly to an unexpected situation, gathered useful insights, and framed the visit as a mission-aligned next step. Some framing and insight gathering could be deepened for even greater alignment and learning.

- Insight Gathering Strong Reach >
- Framing for Mission-Funder Alignment Strong Reach >
- Navigating Tension or Pushback Tivy-Level Talent >
- Adaptability and Decision-Making Under Pressure Tivy-Level Talent >

We Are At a Critical Tipping Point



How Did We Get Here

- The history of the sector has led to everything from stigma to inequity
- Giving is declining
- Fundraisers are leaving
- These aren't separate problems

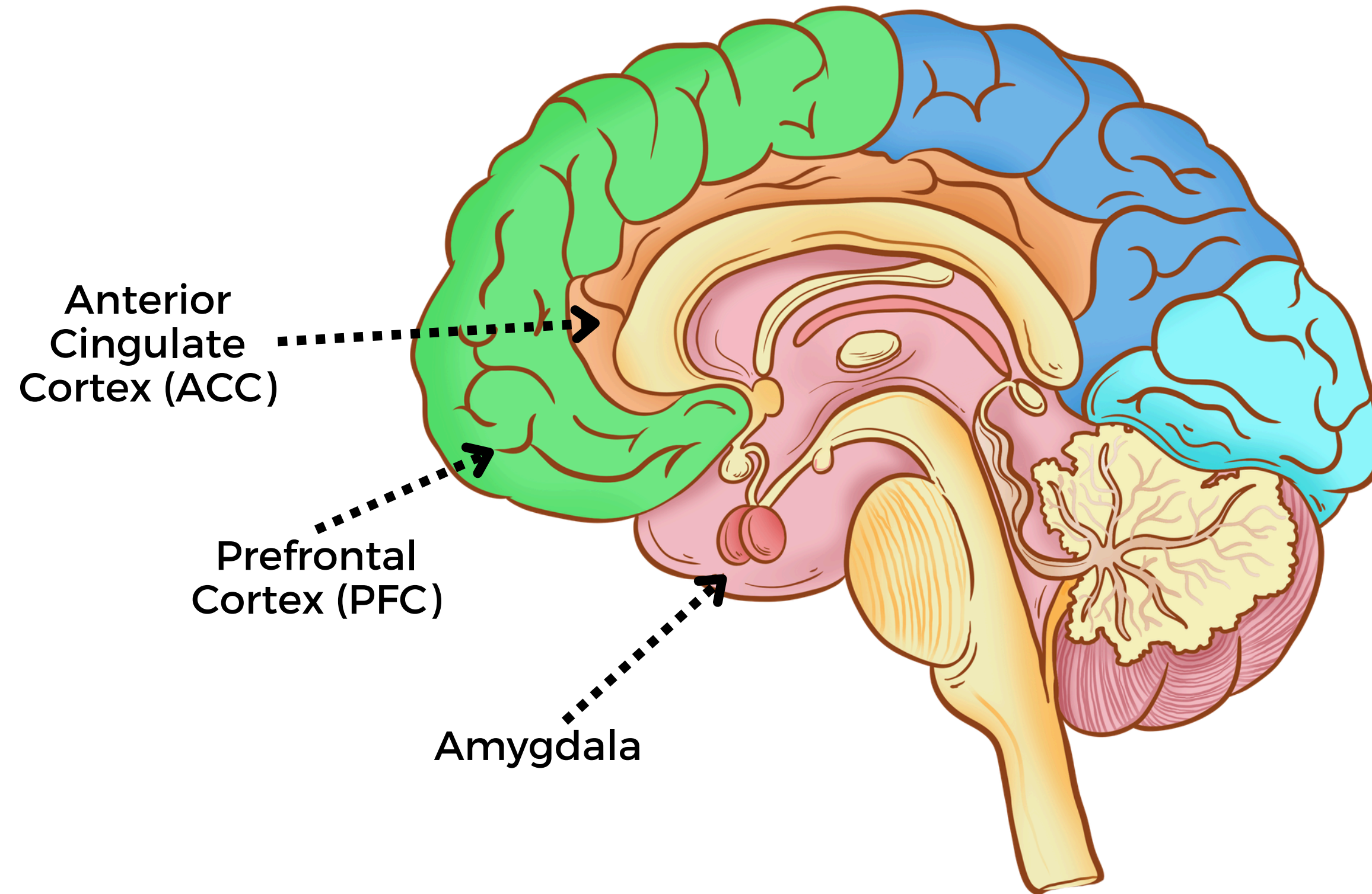
Scarcity Myths

- There Is Never Enough Money
- We Must Compete for Resources
- We Should Operate with Minimal Overhead

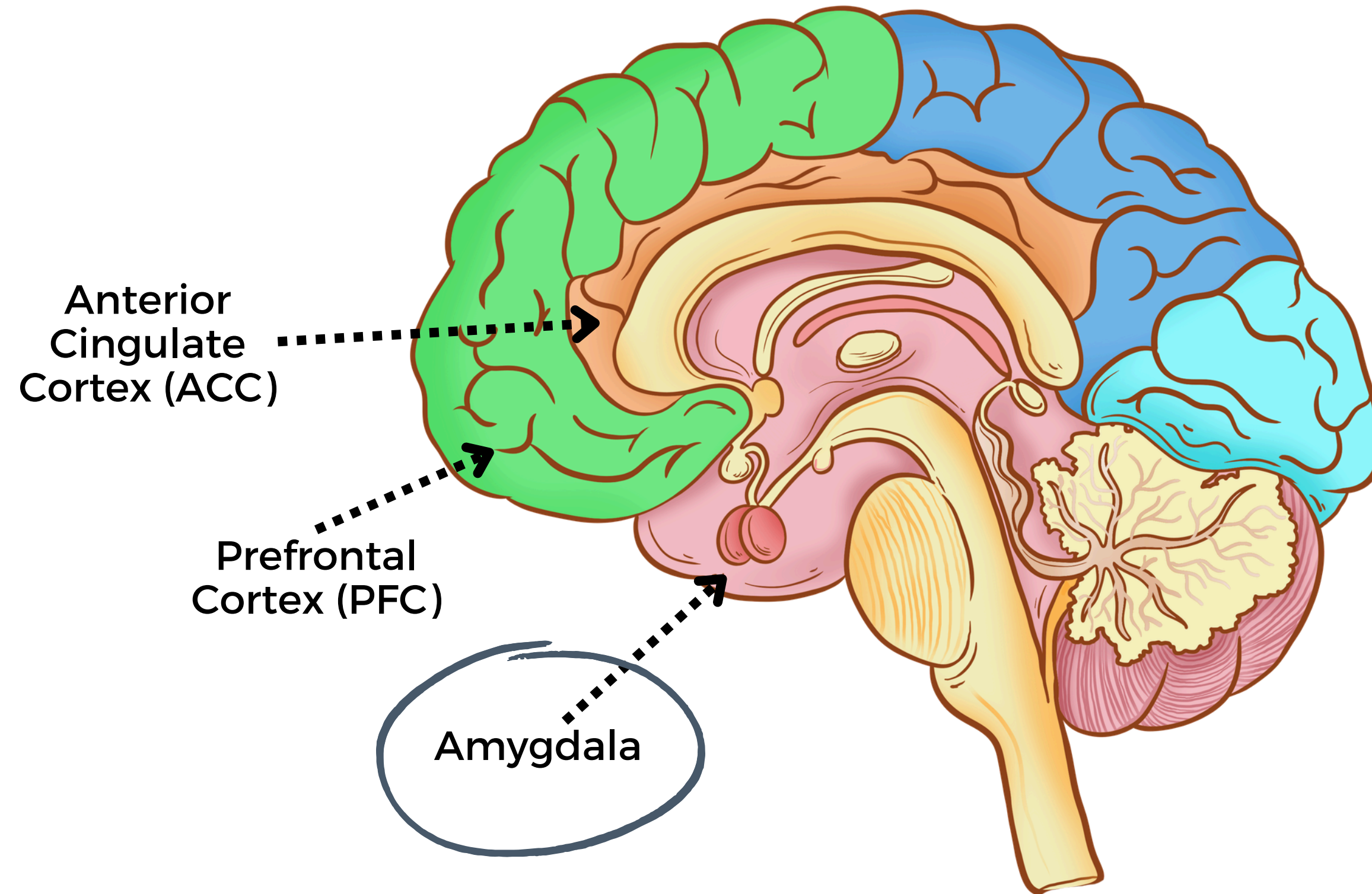
Transactional Norms

- Don't Talk About Money
- Focus on the Rolodex
- Emulate a Car Salesperson
- Do More to Raise More
- Create Urgency No Matter What

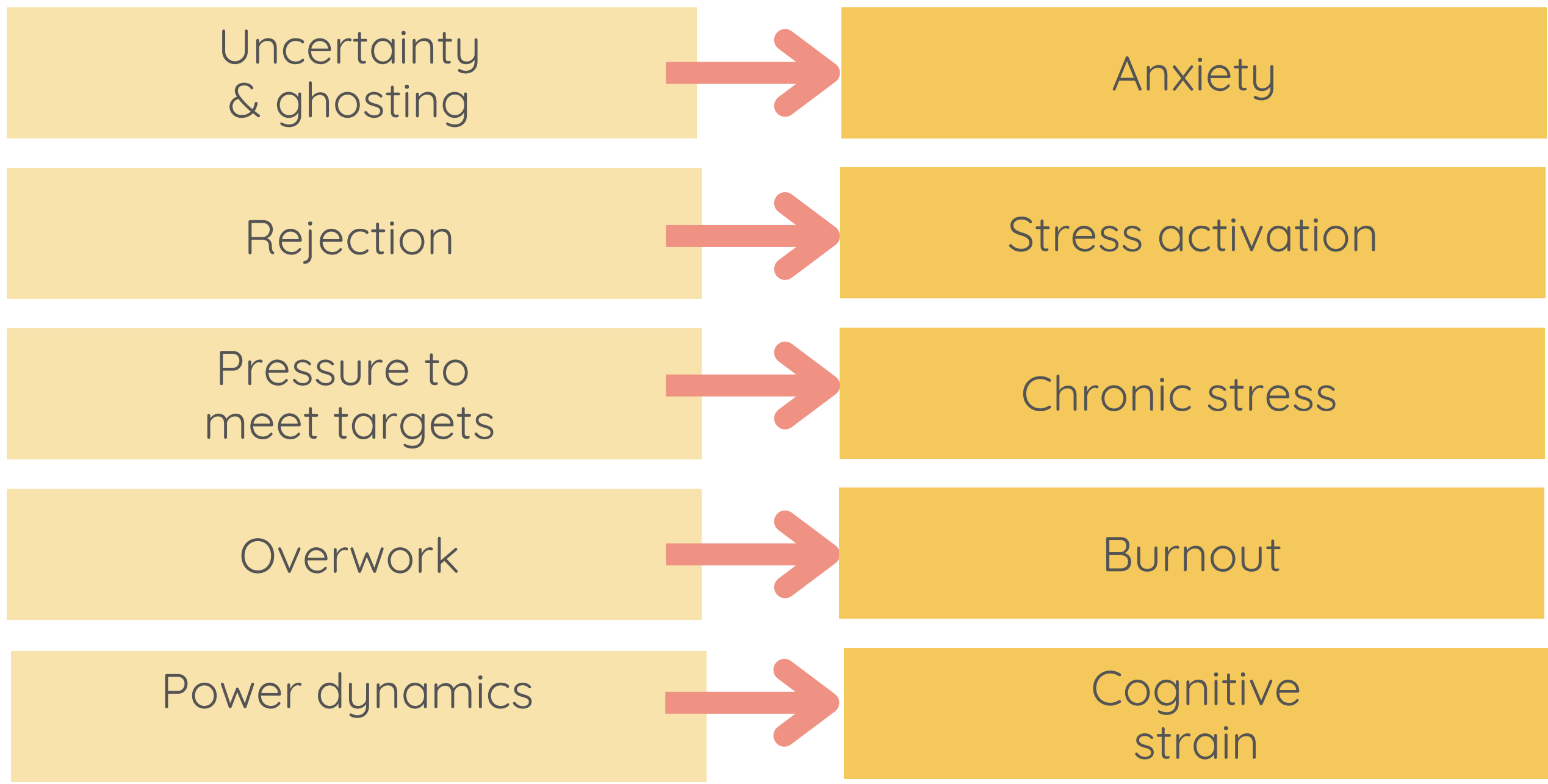
Brain Structures



Brain Structures

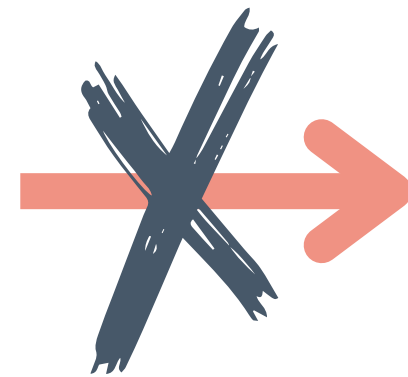


Fundraising Impacts Our Nervous System



Our Nervous System Impacts Our Ability to Connect & Take Action

- Anxiety & stress activation
- Chronic stress & burnout
- Compassion fatigue
- Cognitive strain



- Capacity for connection, compassion, & closeness
- Feelings of trust, empathy, & social recognition
- Innovation, collaboration, flexibility, resilience, etc.

Fear can be really tricky....

Fear can sound like compassion:

“They have so much going on right now. This isn’t a good time to ask.”

Fear can sound strategic:

“We should wait until the campaign is further along before making this ask.”

Fear can sound protective:

“Everyone is treating them like an ATM, I shouldn’t bring up money.”

Fear can sound like loyalty:

“They have already done so much, I shouldn’t ask for more.”

If your goal is to foster
connection....

Fear feels reasonable in the
moment—

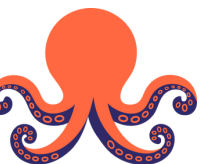
but it's pulling you away from true
connection.

How do we reduce fear?

**THE ROLE
OF
CONTROL**

**THE POWER
OF
KNOWLEDGE**

**AWARENESS
OF
EMOTIONS**



How we measure fundraiser messaging:

The screenshot displays the Practivated Team Management interface. On the left is a dark blue sidebar with navigation options: Dashboard, Your Programs, Marketplace, Team Management (selected), Past Conversations, Coaching with Tivy, Donors, and Your Progress. The main content area is titled 'Team Management' and includes tabs for Members, Teams, Metrics, and Feedback Customization (highlighted in orange). A document upload section shows 'CAYR_Standards_and_Principles.pdf' uploaded on Nov 20, 2025, with an 'Upload document' button. Below this is a table titled 'Standards & Principles' with columns for # Standard, Principle, Evaluation Criteria, Indicators, Scale, and Actions. The table contains three rows of data. At the top right of the main content area, there is a 'JS' label and two toggle switches for 'Active' and 'Coaching'.

# Standard	Principle	Evaluation Criteria	Indicators	Scale	Actions
1 Mission Alignment	Fundraisers must ensure all solicitations support CAYR's mission and program goals.	Clearly explains how the donation advances the mission; avoids unrelated or misleading asks.	<ul style="list-style-type: none">References organizational missionConnects donation to specific program needsAvoids promoting external or conflicting agendas	1-5 scale (1 = no mission link, 5 = strong alignment)	
2 Donor Recognition	All donors must be appropriately recognized and thanked for their contributions.	Demonstrates genuine appreciation and acknowledges the donor's impact.	<ul style="list-style-type: none">Express sincere gratitudePersonalizes recognition based on donor relationshipExplains impact of their contribution	1-5 scale (1 = generic thanks, 5 = highly personalized)	
3 Transparency & Accountability	Fundraisers must be transparent about how funds will be used and accountable for results.	Provides clear information about fund allocation and demonstrates organizational integrity.	<ul style="list-style-type: none">Specifies how donations will be usedShares organizational financials when appropriate	1-5 scale (1 = vague, 5 = fully transparent)	



The Data Source

370

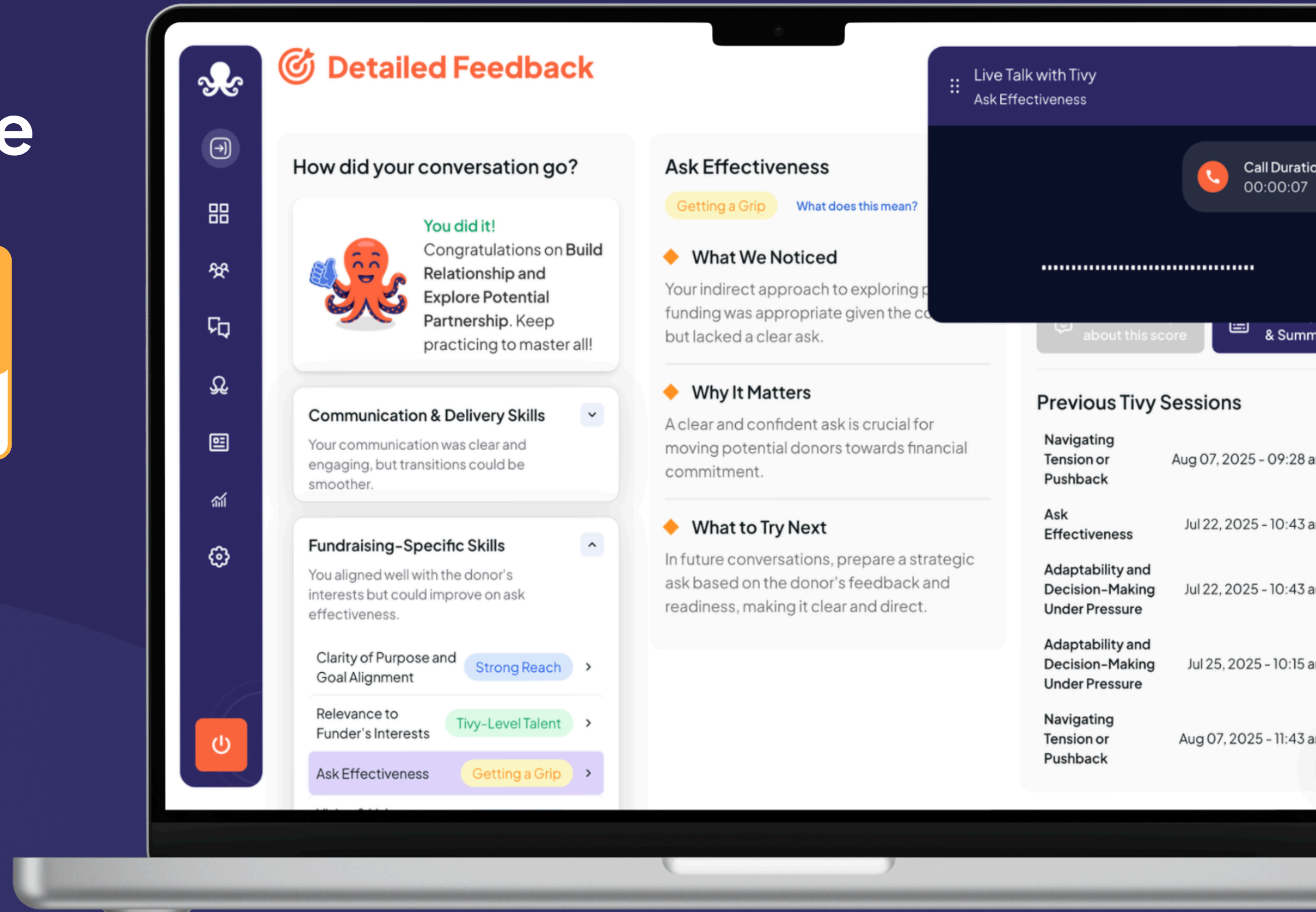
Simulated Donor Meetings

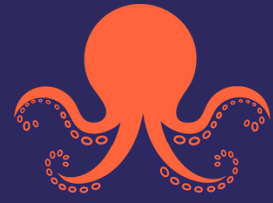
106

practicing fundraisers

16

measurable indicators





Practivated™

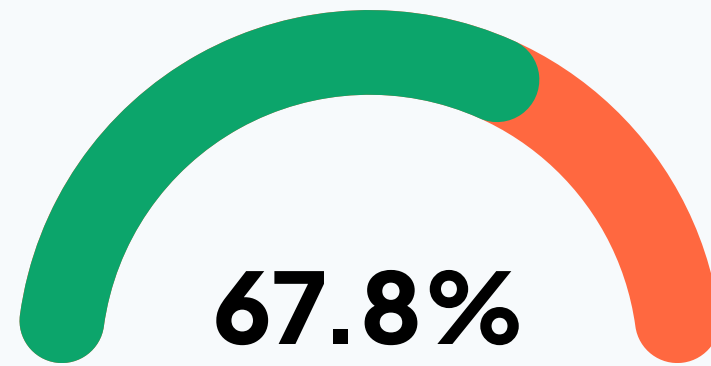
2026 BENCHMARK STUDY

The State of Donor Conversations

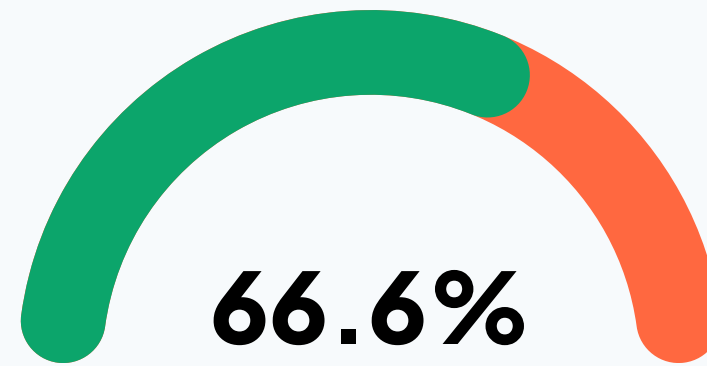


Skill Performance: Where Fundraisers Are Starting

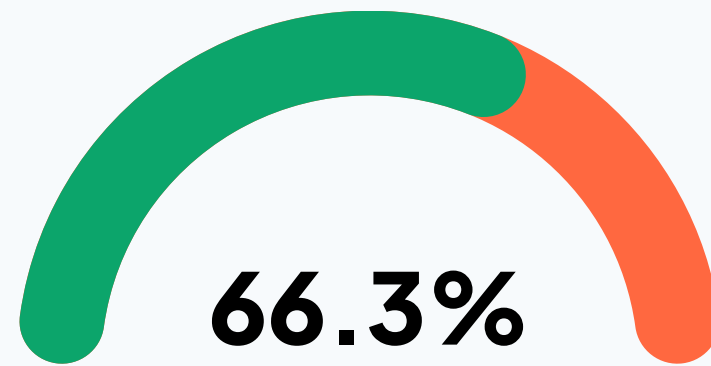
Overall, fundraisers in our dataset showed moderate, balanced performance across four core skill categories. Average scores hovered in the mid-60s (on a 0–100 scale), which signals a solid foundation with plenty of room for growth.



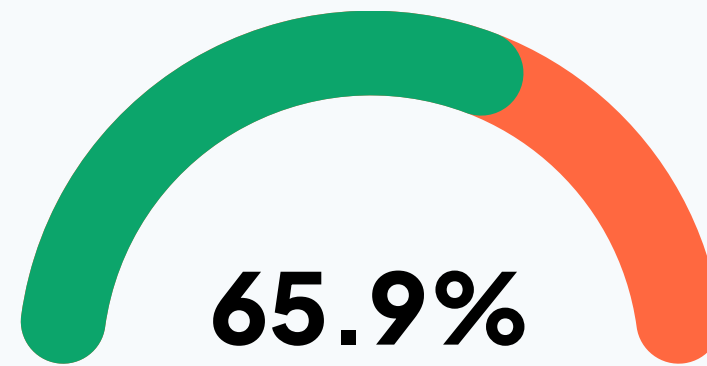
Relationship Building



Communication & Delivery



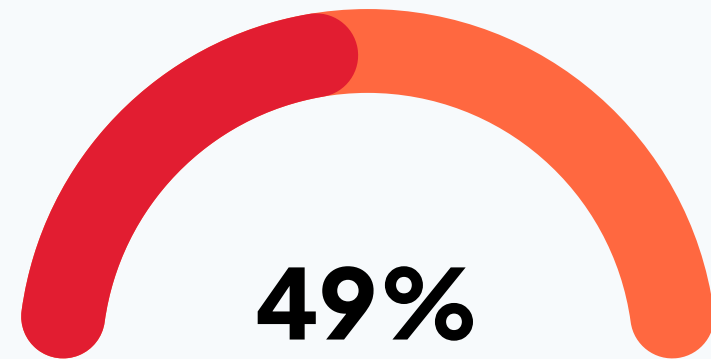
Fundraising-Specific Skills



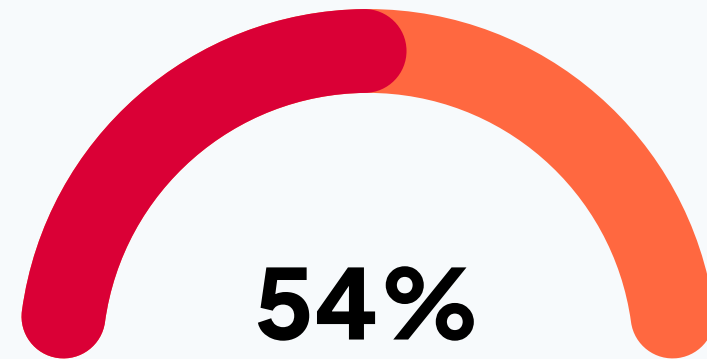
Strategic Thinking

But We Have a Problem: Conversations Break Down When They Matter Most

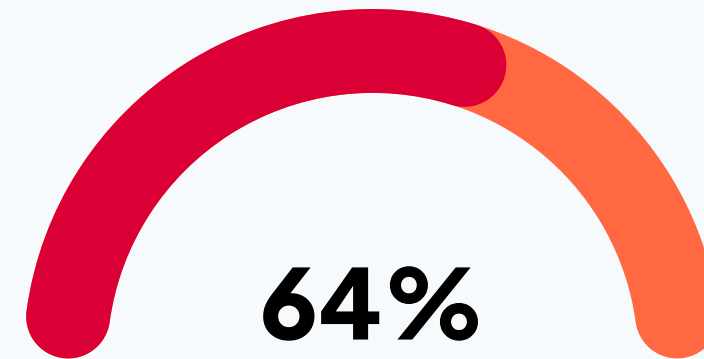
While fundraisers excel at building rapport, the data shows consistent room for improvement in the mechanics of the conversation - especially when it comes to making the ask.



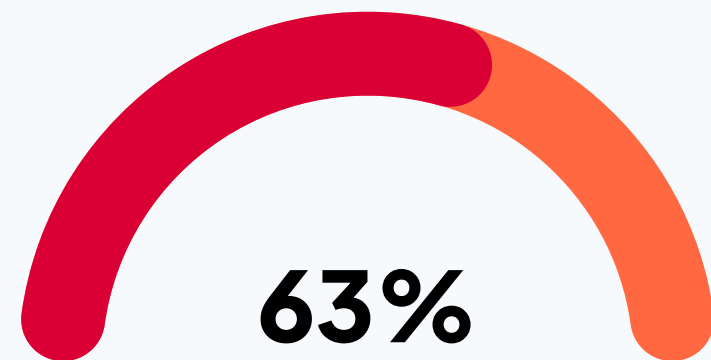
Ask Effectiveness



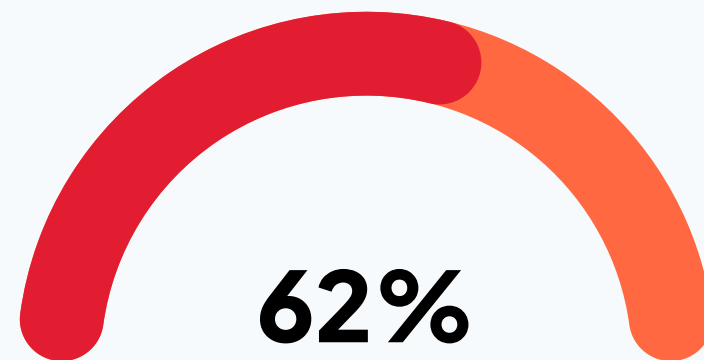
Structure, Flow & Transition



Insight Gathering



Adaptability Under Pressure



Relational Depth



The data suggests that the inability to secure gifts is often the result of **unstructured conversations & unclear asks**, not a lack of connection.

It's a lack of confident follow-through.

The good news

These are teachable skills. And they get stronger with repetition, feedback, and intentional focus.

Does Practice Actually Lead to Improvement?

On average, a fundraiser's 2nd or 3rd simulation score was about 5 points higher than their first – for example, an initial 65% score might rise to ~70% after continued practice and feedback.



Real growth comes from **iterative,**
situation-specific practice and
feedback, not from generic
repetition.

Ensure your feedback has 2 components:

1

Conversation &
Connection Readiness

2

Campaign Messaging
Readiness

Fundraising-Specific Skills

You connected Taylor's giving to specific impact, explored their motivations, and framed the visit as a stewardship opportunity. Some value articulation and alignment framing could be deepened for greater resonance.

Clarity of Purpose and Goal Alignment

Strong Reach



Relevance to Funder's Interests

Strong Reach



Ask Effectiveness

Getting a Grip



Vision & Value Articulation

Strong Reach



Practivated

Team Management

Members Teams Metrics Feedback Customization

CAYR_Standards_and_Principles.pdf Uploaded: Nov 20, 2025

Upload document

Active Coaching

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CASE STUDY



33%

Increase in
Ask Effectiveness



11%

Increase in
Adaptability and
Decision-Making
Under Pressure



97%

Connection
Sentiment

