



# FIELD GUIDE to THE NEW MEGADONOR ARCHETYPES

## IMPLICATIONS AND TO-DO'S: USING ARCHETYPES TO ENRICH DONOR COMMUNICATIONS

**Evaluate your message set against the Archetypes—and add to the set if you notice any gaps.** Archetypes respond differently to opportunities framed in certain ways. Use the *Field Guide to The New Megadonor Archetypes* ([megadonors.lipmanhearne.com](http://megadonors.lipmanhearne.com)) to guide your thinking, and work toward expressing your organization's vision and opportunities using language and narratives that would resonate with each Archetype. You'll streamline your processes and improve your responsiveness to donors when your team is equipped with a complete toolkit of message translations.

**Review your public-facing story from an outsider's point of view.** Would a good-fit prospect newly learning about your organization perceive you as trusted and expert? Would they see your voice in conversations they care about? What impressions would a donor's family and peers take away from your public-facing story—that is, what brand personality are you asking your donor to affiliate with? Do your gift announcements and donor stories portray one style of giving, or a variety?

**Invest in your brand.** As you shape communications about a specific opportunity with your donors and prospects in mind, remember that your prospects are media consumers, too. They will be absorbing other messages about your organization through all of the public-facing channels where you are present (or absent, as the case may be). What you say about the opportunity and your institution must be backed up by what they

read and watch on your website, in your social channels, via print vehicles, and in earned media.

**Deepen your relationships.** Approach your donor conversations with a hypothesis in mind about the Archetype that most closely corresponds to the way you've seen that prospect behave. Use **the following 16 Questions**—and add your own ideas to the list—to invite prospects to reflect on things that matter to them, and brief your communications team about what you learn. Consider assigning an Archetype attribute to individual donor records that can be dovetailed with custom Archetype-specific strategies and substantive, curated direct communications.

**Think about fit.** For some organizations, accommodating certain donor styles would entail changing your organizational culture. *The Field Guide to Megadonor Archetypes* may be useful in guiding internal conversations about fit.

**Think of Archetypes when briefing your communications team about a prospect.** The goal isn't to pigeonhole your prospect, but to think expansively about the experiences that shaped them and the motivators that drive them. Who has been influential in their life, and why? Whom do they hope to influence? What changes has this person lived through—or created—and how do they reflect on those changes? How do they talk about their upbringing? When they talk about the source of their wealth, do they attribute it to fate, hard work, smart choices, or some combination? What do they consider "proof" that a gift has been successful? Use these questions to guide your communications plan.



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## BETTER GET TO KNOW YOUR PROSPECT: 16 QUESTIONS

Experienced fundraisers seem to have a knack for drawing out the formative influences and moments of insight that have shaped a donor's worldview. We've collected our favorite examples here. What would you add?

- 1 What was your early career like? Are there specific turning-point decisions you find yourself reflecting on regularly?
- 2 What are some game-changing breakthroughs you've witnessed in your lifetime? Who or what do you think made those things possible?
- 3 What would you tell people is the most challenging aspect of giving—in general, and in your specific areas of interest?
- 4 What were your early years like? What lessons from your parents and other early mentors have stayed with you?
- 5 In your experiences giving and volunteering, what has surprised you most?
- 6 Do you have a favorite recipient or program you've supported? What about it was most meaningful?
- 7 What would you say are the most important people or opportunities that influenced your life so far?
- 8 What were some lessons you learned early on in your philanthropic work? What did it take to get to those insights?
- 9 How do you stay up to date about the field? What sources do you find helpful?
- 10 Who is doing work in this area that interests you?
- 11 If you could spend an hour with any philanthropist or sector leader, whom would you choose? What would you ask?
- 12 What have you found to be an effective decision-making process in your professional life?
- 13 What does success look like to you, thinking ahead to a year from now? What about within a decade?
- 14 What "unsolvable" problem do you expect to see solved within your lifetime?
- 15 When was the last time you were truly surprised (or delighted)? Tell me about that.
- 16 How do you know when an investment has been a success? What are some early signs?



Telling stories that inspire donors is what moves us at Lipman Hearne. We would be delighted to partner with you. Get in touch with Lipman Hearne via [INFO@LIPMANHEARNE.COM](mailto:INFO@LIPMANHEARNE.COM)—or call us at **312-356-8000**.