



Donor Discovery Questions to Ask

If you're looking for the "perfect" set of discovery questions—you're not alone.

Many fundraisers hope there's a proven script that will unlock deeper conversations and lead to larger gifts. But in practice, the most successful discovery visits aren't driven by a formula—they're guided by curiosity, listening, and a genuine focus on the donor.

That said, having the right kinds of questions can make all the difference.

This resource gives you a flexible set of "mix and match" questions designed to help you:

- Build trust quickly
- Understand what truly motivates your donors
- Lead more meaningful, productive conversations

Use these questions as a guide—not a script—and let the conversation unfold naturally.

How to Use This Guide

- Aim for a natural discussion -- don't ask every question
- Listen actively and follow the donor's lead
- Think understanding, not presenting

Meeting Structure & Conversation Flow

1. Opening (5–10 minutes)

Build rapport and understand prospect's connection to your organization.

2. Discovery (15–20 minutes)

Explore values, motivations, and past giving experiences.

3. Impact & Vision (10–15 minutes)

Determine what meaningful impact looks like to your prospect.

4. Next Steps (5 minutes)

Gently explore continued engagement or follow-up.

While all discovery visits are different, generally aim to limit meetings to 45 minutes or less.

Questions (Mix & Match)

Opening & Engagement

- What inspired you to first connect with our organization?
- What has kept you engaged with our work?
- What initially drew you to this cause?

Values & Motivation

- What motivates your philanthropy?
- Which values are most important in your giving decisions?
- What issues or causes feel most personal to you?
- How do you typically decide where to invest your philanthropy?

Giving Experience

- What has been your most meaningful giving experience?
- What made that experience stand out?

Impact & Vision

- What kind of difference do you most want to make?
- What does success look like in your giving?
- Where do you see your philanthropy making the greatest impact?

Personal Insight

- What are you most proud of?
- What principles guide your decisions?
- What do you still hope to achieve?

Family & Legacy

- How does your family influence your giving? Who else might be involved?
- What kind of legacy would you like to leave?
- How would you like to be remembered through your philanthropy?

Advancing the Conversation

- What areas of our work interest you most?
- Would you be open to exploring ways to deepen your impact?
- What would a meaningful next step look like for you?

The most effective discovery conversations are not about asking perfect questions—they are about creating space for donors to share what matters most. Mastery comes from practice, reflection, and intentional follow-up. If you'd like help strengthening your donor conversations or major gift strategy, I'd be glad to connect.

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