



# Positioning for Success

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We've all been there – when two or three people leave a meeting, each with a conflicting take on what has just happened. Partly this is because we experience situations differently – we impose our own values, culture and beliefs. But, importantly, we each have an innate psychological preference for one of three distinct perceptual positions from which we experience the world. As a fundraiser, identifying what someone's preferred position is and presenting your ideas to match it makes you more influential.

We've all been there – when two or three people leave a meeting, each with a conflicting take on what has just happened. Partly this is because we experience situations differently – we impose our own values, culture and beliefs. Fundraisers are usually good at spotting these.

But, importantly, we each have an innate psychological preference for one of three distinct perceptual positions from which we experience the world. There are three positions:

- **Position 1:** The way you experience the world – the perspective you have on any given situation regardless of others' views and opinions.
- **Position 2:** The way someone else experiences the world – stepping into another person's shoes.
- **Position 3:** Observing the interaction from an objective 'external' position – looking down on the action in a detached way.

As a fundraiser, identifying what someone's preferred position is and presenting your ideas to match it makes you more influential.

If you master the perceptual positions, you will have the ability to:

- Build rapport more easily
- Frame your case to inspire and motivate your donors
- Anticipate possible objections and answer them
- Help supporters make the decision to donate

Our experience of studying really successful fundraisers suggests flexibility in positioning is useful because each position is effective in a different way. However, in one-to-one asks with high value donors who want personal 'matching' contact, it is essential.

With a bit of practice, you should be able to spot a donor's preference.

## Position 1

Position 1 is where everyone holds his or her values, experiences and even prejudices. It is useful for you as a fundraiser when you need to clarify what you want to get, for example when negotiating the benefits linked to a corporate sponsorship. It's also useful to help donors decide to give. In Position 1 you should ask the donor to think about your proposition from their perspective.

“As someone who's a life-long supporter of the theatre, I'm asking you to support our redevelopment project. As you probably remember from your visits, when you come into the foyer there are lots of stairs to climb to the seats so it's very awkward for anyone who's frail or infirm – and more or less impossible for people in wheelchairs. I think you share my concern that the current set-up may be denying the opportunity for many people to experience the wonderful productions we enjoy. Your cheque will make the development happen – ensuring the layout makes access easier. I'd love us to share a glass of champagne at the opening night when you cut the ribbon.”

## Position 2

From Position 2, you can gain an insight into another person's perspective – their needs and experiences. As a fundraiser, this will help you understand donor behaviour or reactions. Be careful not to identify too strongly with the donor... you don't need to understand why they shouldn't give you money! Often adopting this position explains why the donor feels something is important. For the donor it can help them identify with the beneficiary's needs, or it may ensure they consider how others – especially people they admire or respect – might regard them.

“Imagine you're a successful businessperson who happens to have a disability. You've moved to be near your elderly mother and you want to share in the area's cultural life by coming to this theatre that you and I both know and love. You buy your ticket and turn up for the performance excited. But when you get to the foyer you're faced with 20 stairs – and no provision for wheelchair users to get to the seats. Worse still, you feel embarrassed for your elderly mother who hasn't the strength to get up those stairs herself. It feels undignified for you and your mother to be carried, so you end up watching the show from a TV monitor in the bar until the taxi comes. You feel unwelcome and think other people see you as an encumbrance.

“How do you imagine that businessperson feels about how their mother was treated? Don't you think you'd tell colleagues – potential sponsors – about the poor customer care?”

“With your donation both these people will enjoy great theatre. Imagine coming into the foyer for the opening of the disabled access and then moving effortlessly in your wheelchair to the best seats in the house having finished a glass of champagne.”

## Position 3

Position 3 is like viewing the event as a movie where you and the donor are the actors. Fundraisers with this skill can step outside themselves in a difficult meeting to assess how things are going. This position is also useful for rehearsing what you might do or say or reviewing a situation that you believe you could have handled better, to learn from it.

“Imagine there are people in the theatre bar at intermission. You overhear a businessperson in a wheelchair apologising to his flustered elderly mother for the embarrassing situation. She looks very miserable. He sounds angry. In another corner, you and your friends are laughing and talking about how much you’ve loved the performance – and drinking champagne. If you put down that glass for a second what could you say to that businessperson to explain the unfairness? If you could write a cheque at that moment and fix the problems there and then wouldn’t you do it? What would someone who loved theatre do?”

A skillful influencer will flexibly use all three positions live – moving fluidly between them to build rapport. You can also use the three different positions to review past situations and learn from the different perspectives.

Perceptual positioning is a wonderful tool to gain insight into your own and others’ behaviour, communicate more effectively, engage donors and win their support. The same skills can also be put to good use in any interaction where you are looking to influence others, be it donors, colleagues, suppliers or board members.

## Tips

- Practice the positions in different situations with colleagues
- Chat with prospective donors to gauge their preferred position
- Prepare your pitch using the donor’s preferred position
- Step into each position to anticipate objections and prepare responses
- As and when you notice the donor making a shift, adjust your position to match
- Review past situations, using the positions to learn from it.

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## About the Authors

Bernard Ross and Clare Segal are co-directors of The Management Centre (=mc), the UK’s leading training and consultancy provider for the not-for-profit sector. Between them they have over 50 years of not-for-profit experience, and have worked with organisations such as Oxfam, UNICEF and Greenpeace. They are also co-authors of *‘The Influential Fundraiser’*, which was published in 2009.

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