

## Find a Mentor to Smooth the Way

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If you are new to planned giving, you may find yourself at some point struggling, frustrated or overwhelmed and searching for answers.

The value of a wise, savvy mentor is priceless. By strategically hooking up with the right mentors, your planned giving experience and career can be positively affected, qualitatively improved, mellower and more productive.

I've had many fabulous mentors during my 25-year planned giving career. Like a sponge, I've absorbed everything I could and fervently thanked each mentor. Now, mentoring others is my way of paying back all the help I received.

How can you go about inviting these incredible people into your life? First, take a personal inventory. By considering your and your organization's needs, skills, knowledge, strengths and weaknesses — you can strategically identify the right people who can most help you.

### **Advisors**

To boost your technical planned giving skills . . . take advisors on your planned giving committee to lunch and become acquainted. Brainstorm prospect names, ask for technical help, discuss difficult cases, or ask them to accompany you on donor visits or review donor proposals. Volunteers appreciate it when their expertise and skills are put to good use.

Join the nearest planned giving council, attend their meetings and conferences, and network with your peers, as well as the advisors and guest speakers present. Consider forming a planned giving study group.

Try to select the best possible legal counsel for your planned giving program, and take the time to build a positive, open relationship of trust and communication. In my first planned giving position, I selected as legal counsel the top law firm on the West Coast. They become incredible mentors for me as I learned hands-on from them and successfully closed case after case.

### **Board Members**

To enhance the board's support of your program . . . identify the board members on your planned giving committee who truly understand and support your program. Ask them to be advocates for your program at the board level and support your budget and personnel requests.

### **Your Peers**

For management, program and career advice . . . networking with your peers is invaluable. If your local planned giving council or AFP (Association of Fundraising Professionals) chapter has a mentor program, take advantage of it. Or, identify a seasoned planned giving director from a noncompetitive organization, have someone introduce you, and then invite him or her to lunch for a friendly exchange.

### **Toastmasters**

To enhance your public speaking, salesmanship and presentation skills . . . consider joining Toastmasters, an organization designed especially to turn hand-wringers into terrific speakers, or take adult education classes. Many planned giving trainers can teach you how to explain planned giving concepts in simple terms and close gifts.

It's a tradition in planned giving to pass it on in grace and style — so as you learn from your mentors, sincerely compliment them and let them know what a difference they make.