

Four Philanthropic Personas

Scott Mordell, longest serving CEO of YPO, suggested four personas that he sees in most potential philanthropists. Understanding these personas can help you decide how to best craft your message and approach building a relationship with them.

The Idealist

- Want to make an impact
- Interested in making a difference beyond their business
- Make the world a better place

The Legacy Leader

- Chasing a personal legacy
- Want validation that they matter
- Looking for credit for BIG contributions
- Probably want their name featured prominently somewhere

The Model Citizen

- Value the importance of possessing an exemplary life and polished image
- Want to convey a story about themselves
- Philanthropy builds their image

The Busy Bigwig

- Want to make a difference, but don't have the time to personally engage
- Feel the need to give back or do something, not necessarily driven by passion
- Less involvement overall

Different approaches to philanthropy

Depending on their persona, each of these types will have a different approach to philanthropy. For example:

- 1 They trust the organization to use money well - just want to write a check
- 2 Prefer a business approach - want to ensure money isn't wasted ("give me metrics")
- 3 Problem solvers - want to find a creative way to help with a specific issue

After considering your audience and approach, how do you meet this need for them?

Intrigue Your Audience

Based on each of the personas listed in the previous section, what kind of intriguing beginning do you think would appeal to them?



The Idealist: _____



The Legacy Leader: _____



The Model Citizen: _____



The Busy Bigwig: _____

Change can only happen when we take the time to listen and learn from each other, which is why Leadership Story Lab hosts opportunities for these conversations to occur. We are struck by how powerful it can be just to hear stories about the experiences of major donors. [Hear more about our conversations on wealth and philanthropy.](#)

INSIDE

Out

3 Simple Steps to Create Brief & Brilliant Stories

Pull together the shape of your story using the IRS Story Structure. Start with an Intriguing beginning, Riveting middle, and Satisfying end.

I *Intriguing Beginning*

What happened? Share key facts and figures. Set up a scene. Extrapolate the Conflict, Contrast, or Contradiction buried in the data. Use a **hook**. Intrigue your audience.

R *Riveting Middle*

What does it mean? Translate data and elevate the information into **meaning**. What do the events or details mean to you? What do they mean to your audience? Transport them on a journey filled with challenges and changes. If challenge is the nerve center of a story, then change is the soul of it. Make the middle riveting.

S *Satisfying End*

Why should they care? What do you want them to **do about your story**? What takeaways--up to three--do you want them to remember? Make the ending satisfying.

Continue your storytelling journey at your own pace!

We recommend these resources:

CONNECT WITH FIRST GENERATION WEALTH CREATORS

Our research has revealed that even though each first generation wealth creator is unique, many share surprising commonalities and can benefit from learning more about the experience of others in their new tribe. We invite you to connect with other wealth creators - [contact us for more information](#).

STORY LAB

Every month we host a free, virtual story lab where we discuss a topic, practice storytelling, and give constructive feedback. We keep the group small so that everyone has a chance to share - registration is limited. [Join our next session!](#)

HOW TO FULLY UNDERSTAND YOUR DONORS' STORIES

This article explores [three takeaways fundraisers can learn from major donors](#). This is key if you want to truly understand your audience and craft stories that will resonate with them. They are the best source to tell you what it is like to be them!

LET THE STORY DO THE WORK

Esther's book, [Let the Story Do the Work](#), provides many more templates and examples for other business storytelling tools. Chapter 10 is specifically about "Selling the Social Impact of Nonprofit Organizations Through Story."

ABOUT LEADERSHIP STORY LAB

Leadership Story Lab coaches executives in storytelling and helps them become more engaging and persuasive to gain a competitive edge. Since 2010, Esther Choy and her team have served clients such as United Airlines, Tyson Foods, PwC, Brookfield Asset Management, US Cellular, and SC Johnson. We have helped leaders get promoted, excel in their jobs, and motivate their teams and customers through storytelling.

Learn how you can tell the right story at LeadershipStoryLab.com.

Stay in touch! Contact us for more information about any of these resources:

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