

## OVERVIEW OF A DONOR VISIT

While no two donor visits look exactly the same and there's no specific agenda you have to follow when meeting with a prospect, this is generally how it works:

- Start with some small talk, build a rapport, and discuss any mutual interests, people you know in common, connections you have, etc.
- Uncover the prospect/donor's interests, passions, and concerns. Why does s/he care about your issue or organization? If s/he were to give, what would the benefit be to him/her?
- Make a BRIEF presentation about your work. Allow the prospective donor to participate and ask questions. A general guideline is that you should only be talking 20% of the time during the whole visit.
- Ask for a gift, naming a specific amount or range. Then, BE QUIET, maintain eye contact, and wait for them to respond. This will feel like an eternity, especially the first time, but it's only a few seconds.
- Address any concerns or objections.
- Close the meeting by restating and clarifying any agreements or next steps.
- Send a personal, hand-written thank you note immediately after the meeting. The organization should send another acknowledgement when the gift arrives.

### Suggested Questions to Ask Donors – and Prospective Donors

The most important part of all these questions is remembering the responses and making sure all the information ends up in the database after your meeting so it can be used to personalize future communication.

- Why did you first give to our organization?
- What interests you most about our organization? Why? What areas are less interesting to you?
- What are the most critical results you expect our organization to produce? Why?
- If you had an hour with our Director/Board President, what would you tell them?
- What do you tell others about us? How do/would you describe us to others?
- Why does this cause matter to you? Why now in particular?
- What do you believe would most transform \_\_\_\_\_ (whatever problem you are working to address)?
- Which other organizations do you believe effectively address this cause?
- How does our organization compare to others working on this cause?
- How does your belief in our group compare to the other groups that you support?

Always be sensitive to what questions are appropriate for whom. Everyone has different boundaries that must be respected. And so must yours.