One of the most challenging situations development professionals encounter is setting up that elusive first-time visit.

*Check out these three essential steps, with strategies to maximize your effectiveness.*

**FIRST:**

*Do your homework.*

**What links does this person have to the organization?**

- When securing the first-time meeting, knowing a **person** who can make an introduction can be particularly useful.
- We should also know any **previous experiences** the potential donor has had with our organization.
- If an individual has made **previous contributions**, we should be aware of those and able to share their impact.

**What is the potential donor's financial capability?**

*Remember that this is more than financial capacity.*

- What are the **logistics**; that is, how is this wealth held? (Stocks, real estate, etc.) Is it liquid or tied up?
- What other **obligations** are speaking for portions of this wealth?
- What are the potential donor's **attitudes** toward wealth and philanthropy?
SECOND:

Decide how to reach out.
Recognize that at times, a combination of methods may be most effective.

Phone
This is almost always the best first choice.

- It is personal.
- It can create a sense of urgency.
- It allows for conversation.
- If an individual has made previous contributions, we should be aware of those and able to share their impact.

Email

- Is the donor hard to reach by phone (travels a lot, has a busy schedule, etc.)?
- Do you have supporting materials you want to share via a link?
- Is the donor’s personality profile such that he/she prefers written communication?
- Always follow up with a phone call (do not put the onus on the donor to get back to you).

Letter

- Is the donor of a generation that prefers letters?
- Do you have supporting printed materials?
- Would a personal handwritten note be meaningful?
- Always follow up with a phone call (do not put the onus on the donor to get back to you).

Event

- Will you be seeing this individual at an event soon?
- Is there a person associated with the organization who may be willing to make an introduction?

THIRD:

Strategize for an effective message.
Remember, the objective of your message is simply to secure a meeting, nothing more.

1. Introduce value through a link to the organization
2. Share your reason for reaching out by building a value proposition for meeting
3. Prepare to answer questions and objections effectively
4. Specify options of dates and times for the meeting

Interested in conducting more impactful donor meetings? Learn more about our workshop, Tactics for Optimizing Donor Meetings.