



HOW TO GET A MEETING WITH A NEW POTENTIAL DONOR

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](#).