

## ***Tactics for Optimizing Donor Meetings***

### **A Virtual Professional Education Experience for Development Professionals**

This four-hour workshop focuses on planning for and executing impactful in-person and virtual donor meetings. Participants will work together in small groups to discuss and develop a micro-strategy for their next meeting with a real-world potential donor using the five-step process for an effective donor meeting.

In addition to the workshop, participants will be enrolled in **myAR Plus**, an online reinforcement platform providing access to additional resources and review modules to encourage ongoing professional development and application. During the 12-month enrollment period, participants will receive monthly reminder emails encouraging them to explore the premium resources related to various workshop topics.

Recommended Preparation: *The Art and Science of Donor Development*

## **Syllabus**

### **Introduction**

Participants experience a brief review of donor motivation, the Donor Commitment Continuum, the Donor Development Chart, and methods for securing meetings with donors.

### **Preparing for a Donor Meeting**

Participants discuss how to set objectives in preparation for meeting with donors. They also explore the challenges of conducting meetings virtually, with key tips to optimize the virtual setting.

### **Facilitating a Discovery Meeting**

Participants examine the five key steps for effective donor meetings, in-person or virtual, utilizing High-Value Questions and tools for presenting organizational priorities.

### **Involving Key Partners**

Participants explore a model for a collaborative meeting that leverages the strengths of key organizational partners. They also learn points for preparing to host a meeting with multiple attendees—both in person and virtually.

## **Structure**

### **Classroom Engagements**

Participants will experience the four-hour workshop in a real-time virtual classroom. This session features networking opportunities, application exercises, and interactive facilitator support. Participants should be prepared to attend the entire session, as this is not a webinar, and interactivity is essential to the success of the experience.

### **Pre- and Post-Work Assignments**

Prior to the workshop, participants will be asked to complete a pre-work assignment. Additionally, participants have the opportunity to create and complete additional application exercises.

### **Technical Requirements**

Participants should use the Zoom™ application, following download instructions as prompted from the web browser of their choice. Participants should be prepared to use headphones with a microphone and/or speakers, a keyboard, and a consistent Wi-Fi connection.