

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

### **A Virtual and Distance Learning Experience**

Navigating how, when, and where you engage with donors is complex. Learn how to execute impactful meetings—no matter the type—with your donors and potential donors in *Tactics for Optimizing Donor Meetings*. The session will prepare you to conduct purposeful, action-oriented meetings by employing Advancement Resources' research-backed five-step meeting process.

Walk away with a micro-strategy in place for one of your real-life donors—and the skills to apply the concepts learned in creating powerful strategies for success in meetings. You will gain valuable ideas for engaging with donors from both our accomplished facilitators and your fellow participants as you explore together the donor-centric approach to meetings. Through its hands-on learning approach, this workshop will deliver in elevating your donor engagement to a higher level through purposeful meetings.

### **Who Should Attend?**

- Major gifts professionals
- Development leaders
- Planned giving officers
- Other fundraisers interested in expanding their major gifts mindset

### **What Will I Gain?**

After this workshop, you will be able to:

- Craft action-oriented objectives in preparation for donor meetings as part of an overall donor engagement strategy.
- Implement a five-phase donor meeting process that leads to action.
- Utilize a variety of methods to secure meetings with donors and potential major donors, including using value propositions, leveraging referrals/introductions, and responding to objections.
- Ask high-value questions of donors that will guide and refine engagement strategy.
- Exercise a variety of tactics to build trust-based working relationships with organizational partners.
- Conduct collaborative meetings with key organizational partners.
- Learn key tips for optimizing virtual meetings.

## What Can I Expect?

Designed to accommodate your schedule, this **4-hour** session is unlike other virtual trainings, as it is not a pre-recorded webinar that you simply watch on-demand. Instead, our facilitators will actively engage you from start to finish through lively large- and small-group discussions, video case studies, and activities based on scenarios commonly encountered by development professionals. In addition, you will create a micro-strategy for your next meeting with a real-world potential donor.

Our workshops are best experienced using the most recent Zoom™ app on a strong, consistent internet connection. Due to the interactive nature of the training, please plan to use a headset or earbuds with a microphone and/or speakers and a keyboard.

## Are There Any Perks?

Participation in *Tactics for Optimizing Donor Meetings* includes a one-year subscription to **myAR Plus**—our premium online learning platform that provides on-demand resources for practicing and applying the concepts you will learn in the workshop. During your subscription, you will receive regular communications exploring topics and resources on **myAR Plus** that are specifically designed for major gift professionals.

## Can I Earn CFRE Points?

Completion of *Tactics for Optimizing Donor Meetings* is applicable for 4 CFRE points. Additional points are available by requesting and completing a personalized program on the **myAR Plus** platform.