

## Individual Donor Visit Materials

### Sample calling rap:

"Hi, is George there?"

"Yes, this is George."

"Hi, George! This is Mary Grace from \_\_\_\_\_. How are you doing?"

"Fine."

"Good. I'm glad I got in touch with you- I promise to keep this quick. I'm calling today to follow up on a letter I sent you last week, asking for a time to stop by and visit with you. I'll be in your area on Wednesday, June 20th- would it work for me to stop by at 2 pm?"

"That should be fine."

"Great, thanks! Let me just make sure I have your information correct. Are you at 122 Main Street?"

"Yes, that's right."

"Great, and do you have a pen handy? I just wanted to give you my name again so you know who to expect."

"Sure, go ahead."

"Ok, my name is Mary Grace with \_\_\_\_\_ and I will be there at 2 pm on Wednesday, June 20th. I really appreciate this. We're doing great work to \_\_\_\_\_ and I'm excited to talk to you about it."

"Ok, see you then. Bye."

"Bye."

Phone responses:

1. No, thanks.

Ok, did you get the letter I sent you?

-Maybe, I'm not sure.

No problem, the letter was explaining that \_\_\_\_\_ has made it a big priority this year to meet with as many supporters as we can. It's really helpful for us and I will be in your area visiting other folks that day too. Will Wednesday at 2 pm work for me to stop by?

2. I'm not the best person for you to talk to.

We're definitely looking to meet with as many supporters as we can so I'd love to meet you! Did you get a chance to see the letter I sent?

-Maybe, I'm not sure.

No problem, the letter was explaining that \_\_\_\_\_ has made it a big priority this year to meet with as many supporters as we can. It's really helpful for us and I will be in your area visiting other folks that day too. Will Wednesday at 2 pm work for me to stop by?

3. I'm too busy.

No problem, this visit wouldn't take too much time. To be honest, most of them are pretty quick. Did you get a chance to see the letter I sent?

-Maybe, I'm not sure.

No problem, the letter was explaining that \_\_\_\_\_ has made it a big priority this year to meet with as many supporters as we can. It's really helpful for us and I will be in your area visiting other folks that day too. Will Wednesday at 2 pm work for me to stop by?

4. I don't know much about your group.

I hear you. One reason I'm hoping to meet you in person is to fill you in on all the good work we're doing right now.

Did you get a chance to see the letter I sent?

-Maybe, I'm not sure.

No problem, the letter was explaining that \_\_\_\_\_ is working right now to \_\_\_\_\_. I'd love to fill you in and hear your feedback on this issue. Wednesday at 2 pm work for me to stop by?

**Donor visit outline:**

- I. Greeting, small talk
- II. Agenda and time check
- III. Your personal story
- IV. Getting to know the donor
- V. Campaign story 1 - \_\_\_\_\_ Victory
- VI. Campaign story 2 - \_\_\_\_\_ Current campaign/work
- VII. Questions from donor
- VIII. Ask for money
- IX. Paperwork, options to give, confirmation, next steps

**Example donor visit:**

- I. Greeting, small talk

"Hi George! I'm Mary Grace from \_\_\_\_\_. Thank you so much for letting me stop by today- I really appreciate your time. This is a great neighborhood you live in, how long have you been here?" etc.

- *Thank them for letting you come by and for their time.*
- *Introduce yourself, accept coffee/water/food.*
- *Make a connection (Ex: I like that painting.)*

- II. Agenda and time check

"Again, I really appreciate your time today. I'm hoping to get to know you a little better, tell you more about the work that \_\_\_\_\_ is doing, and talk to you about your financial support of the organization. I usually chat with folks for about 45 minutes, will that work for you?"

- *Agree on how much time you'll spend together (ideally 45 min- 1 hour)*
- *Go over the things you want to cover*
- *It's very important to tell them you're going to ask for money. We don't want that to be a surprise at the end of the visit.*

- III. Your personal story

*-Tell them a little bit of your history, college career, work background. The idea is to impress them and explain WHY you're working with \_\_\_\_\_.*

#### IV. Getting to know the donor

"So, George, what about you? Where are you from? I'm curious, when you think of \_\_\_\_\_, what comes to mind? Which issues are most important to you? What other issues, besides ours, are you interested in? What do you do for work? What's your family like?"

*- This part is critical in figuring out what organizational issues they care about and what OTHER issues they care about. The second part is almost as important as the first. Concentrate on connecting with people on anything in this part- it doesn't have to be relevant to our work. You want them to think "This person could be my friend, we have something in common." That might be passion for an issue that you work on or it might be basketball. It doesn't really matter- just make a connection.*

*- Find out where they're from, where they went to school, how many kids they have, what they do for work. This is not a checklist- do not bombard with questions, just let the conversation flow.*

#### V. Campaign Story 1- Victory Story

Donor: "Yeah, that was great! I'm so glad \_\_\_\_\_ is working on that issue."

"Me too, I'm really happy to see our progress."

#### VI. Campaign Story 2- Current campaign

Donor: "Wow, that would be great. I'm totally in support of that effort."  
"Great!"

**Note-** *with both campaign stories- err on the side of keeping it simple instead of overdoing it with details and information. You do NOT want the person to think, "Wow, I really don't know much about this. I'm probably not their target member who should give a lot to this group."*

*You want the person to think "I basically understand these issues and we're on*

*the same page about them."*

## VII. Questions

"George, I know I just gave you a lot of information. Do you have any questions about the work we're doing or does it make sense?"

Donor: "Actually, I was wondering what your budget is each year?" or "No, that all makes sense and sounds good."

*This is when you make a specific point to ask them what questions haven't been answered yet. These could be issue-based questions, organizational questions, budget questions, etc. Make sure you don't make them feel uncomfortable if they don't have any at all- that's fine too! The reason this is a dedicated piece of the visit is that we don't want them to interrupt the ask if we can help it. That part should be momentum- building.*

## VIII. Ask for money

"As you can see, our organization works on critical issues and we have a talented staff and Board that get real results. To support all of this great work, I'm working to raise \$XXXXX this month. So George, I'd like to ask you to deepen your support with \_\_\_\_\_ and make a significant investment of \$XXXX."

*- Give the context, say their name, and ask for a specific amount confidently.*

*Then-*

- CLOSE

C - Close your mouth

L- Listen

O- Open-ended questions

S- Speak from the heart

E- Exact right amount

Donor: "Whoa, I wasn't expecting for you to ask me for that much. I was thinking of a much smaller amount. I have two kids in college and a mortgage. \$XXXX just isn't possible right now."

"I totally understand. I'd love to figure out an amount that you feel comfortable with. What is it that you like best about \_\_\_\_\_'s work?"

Donor: "Well, I really like how you're on the forefront of such important issues and that you're willing to take on tough stuff."

"Yeah, me too! That's what I've been so impressed by so far at my time with \_\_\_\_\_ . The organization really is tackling issues that are affecting all of us and they have tangible solutions. It's a group that's strategic and really gets things done. I feel like it's pretty unique and great to have good organizations working on these issues. I hear you that \$XXXX is too much right now. I'd love for you to give \$XXX to our work."

*- Speak from the Heart: This is when you reiterate why you love \_\_\_\_\_'s work and why you think it's important that they contribute. Take their mind off \$\$ for a minute and bring them back to the important issues.*  
*- Exact right amount- This is also called re-targeting. You might have just gained extra information that helps you to retarget an amount that will work better for the member.*

IX. Paperwork, options to give, confirmation, next steps

Donor: "Yes, I can do that. That is a more realistic amount."

"Great! Thank you so much. I promise we'll put it to good use. You can contribute by check or credit card, and you can give a one time gift or break it up into monthly gifts. What works best for you?"

Donor: "I can write a check right now for \$xxx."

"Perfect! Thanks again. Also, I would love to stop by next year and visit with you again. Can I get your cell phone number and confirm your email address? (*work number, etc*). And would you be willing to follow us Twitter and join our Facebook group?"

Donor: "Yes, I'd love to meet with you again and here is my correct contact info: .... Yes, I can definitely follow you on Twitter."

"Ok, well thanks again for everything, It was great to have a chance to meet you and I hope you have a great rest of your day!"

*- Thank them for agreeing to give, explain the options they have (check, credit card, sustainer, one time gift) and confirm the amount.*  
*- Next steps: Make sure you have as much contact information as you can possibly get: cell number, home number, work number, address, email address,*

*and preferred type of contact. Explain that you will be contacting them in the future to chat again (we want them to expect our call next time around). Thank them and go to your next visit!*