

HOW TO SOLICIT A GIFT

GENERAL GUIDELINES

1. Set a dollar range in your mind for each prospect before you begin the visit.
2. Make an appointment. Find a time convenient for the prospect. Be on time.
3. Do not make a request over the phone if you can possibly see someone in person.
4. Know your written proposal; have them arranged so you can find what you want. Give the prospect what they need or ask for. Give printed materials after you are finished talking.
5. Talk positively about what your organization wants to do and how it will benefit the prospect.
6. Ask. Wait for an answer. Understand that if a person is quiet they are thinking about their personal situation and to interrupt is a major mistake. Give them time to think!
7. Let the prospect talk and ask questions. Know when to stop talking, and to "close."
8. Be sympathetic with complaints; offer to get additional information. Never argue!
9. If the prospect says no, thank them politely for their time. Leave them smiling, no matter what their answer! It is more important to have a friend than a gift, but leaving with both is more fun!
10. If the prospect says maybe, softly find out why they are a maybe. What is the roadblock?
11. If the prospect says yes, discuss how they will complete the gift.
12. Ask if they want to memorialize or honor someone with the gift.
13. Ask if it would be helpful to make the gift with unrealized assets.
14. Always report results on the same day to the person to whom you are responsible.
15. Always send a personal handwritten note after the visit – especially if they said no.
16. Always make a follow-up contact!
17. Leave materials, and your name, phone number or email address. Make sure that you have their phone number and email address, and confirm if they prefer a phone call or email.
18. Remember that each solicitation will have something unusual happen, so remain flexible.
19. It is important to know when to move on/off with a donor.