

Preparing for a Meeting with a Prospect

- Who in your network can connect you to a donor or donors who have an interest in your organization's mission?
- Once a donor prospect has been identified, find out what you can about them and their giving patterns.
- Organize a casual phone call or time when your "connect" can set up the opportunity for a meeting.
- Prepare your materials for the meeting so that you can show the prospective donor how you are giving them an opportunity to make a difference: special programs, special events, your financials that show you are a good investment.
- Choreograph who will talk, when and what about – make sure your "connect" will be there. When in the meeting will the ask occur and who will ask.
- The Ask: How much to ask for? Make sure your ask is within their giving range and appropriate to your budget size.

Be prepared to evidence other similar support in your organization and why this amount is so important to you. Be able to articulate specifically how this gift will make a difference.

- Who will set up the more formal meeting? Send social confirm.

The Meeting

- Your "connect" takes the lead at first.
- Allow the donor prospect time to talk about their interests. This can guide them to you.
- Briefly explain your opportunity.
- Highlight a few points in your materials.
- Make the ask.
- What else do they need or would they like to know? Be definite to set up further contact to follow-up. (Few checks are written at these meetings. When can you connect with them again and how?)
- Thank them for their time at the meeting and for their investment in the community/arts/programs similar to yours.