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# Creating Access to Prospects

## GETTING THE FACE-TO-FACE MEETING

- Never Ask for A Gift Over the Phone. Never Agree to Mail Information Before, or Instead of, a Personal Visit.
- Make A Brief Phone Call – The Only Purpose Is To Get An Appointment (at a time and date convenient for you as well). Make The Appointment For This Topic Only – Never Combine It With Another Topic.

*“Hi \_\_\_\_\_, I’m calling because I’m a part of the effort to renovate and expand Randolph Hospital. You may have heard about the efforts to build a Cancer Center so that local cancer patients can get their care locally and a new Outpatient Center as well. I’d like to meet with you (and spouse) to talk about the building project. I know you are busy but this is an important project – when might it be convenient for us to get together?”*

- Never Meet In A Restaurant – You Can’t Show A DVD In A Crowded Restaurant.

### **THE OUT**

“This is SO important to me that I ...”

**Once Appointment is Set, Call Doug Aitken (336) 633-7755 with Date, Time and Location. He’ll Coordinate Everything. Do NOT try to coordinate with Doug beforehand ... he’ll make your date and time work. Trust Us!!!**

## AN EFFECTIVE SOLICITATION VISIT

- Always go with another person. Never go alone. Doug Aitken will make himself available for any visit, or coordinate visit with the cabinet members. This is that important.
- Visit with decision-maker(s). Top executive/owner in a business, husband and wife, together, for individual asks. Don’t make someone else explain this project to their “boss”.
- Actual visit should take 30 – 45 minutes and be a relaxed, comfortable experience.
- Explain personal commitment/involvement and importance of the project and explain, in your own words, briefly, what the project is, the reasons for it, and give a very brief overview of the fundraising results to date. Provide a copy of the brochure, without the gift plan insert or pledge card (always keep the pledge card in your pocket, out of sight)
- Show the DVD (personal players are available). When DVD ends, ask for questions and answer them.
- After questions, the request is simple. Generally, the cabinet member/co-chairs or Doug Aitken will do this part:

*(Over)*

## To Solicit a Prospect

*“ \_\_\_\_\_, we’re here today to ask you to financially support this important campaign. We’d like to ask you to consider the <name of gift plan> that is outlined here in this handout. <Explain details of the gift plan, including recognition>. \_\_\_\_\_, does this sound like something you can do to provide quality healthcare for the people of this area?”*

## **RESPONDING TO THE PROSPECT’S RESPONSE**

The response will be one of four answers ... and our response.

- a) If yes ... thank the donor and ask him/her to complete a gift intention form.
- b) If no ... politely thank the prospect and leave as quickly as possible.
- c) If he/she requests time to consider the request ... this is a positive answer and means the prospect is seriously considering your request. Graciously grant the time, but **set a return appointment before leaving**. It is best to set the return appointment for within one week of the initial visit.
- d) If he/she offers a lower amount ... if you believe this may be the most the donor will ever give, accept the gift and complete the gift intention form. Many donors will actually give more if given a little time, and rarely will they lower the gift if given time. You may consider offering the donor some time to think about it. A good response is ...

### **THE OUT**

“I really wasn’t prepared for you to make a decision right away. I’d like you to think about your involvement and, because this is so important to me, I want to set a specific time to come back and finalize your decision ...”

**Never leave without either a decision or a date to personally meet with the prospect to receive their answer.**