Prepare Solicitation Calls

Once we confirm an appointment with a prospective donor, it is advisable to prepare in advance. We do so out of respect for those with whom we are going to engage as their time is precious. We go to be as effective and impactful as possible. To prepare a solicitation call, begin by outlining the call, step by step, and put it in writing.

Here are elements to think through and put in writing:

- Prospects name(s)
- Date, time and location of the meeting
- Participants to attend with the prospect or your organization
- Giving history – to your organization and/or others
- Purpose of the engagement
- Historical context and/or connections
- Meeting strategy and call structure
- Anticipated objections or challenges
- Materials for the visit
- Family names and relevant details
- Other notes of value

It takes time to prepare well. Develop an outline of the call and script out each step in the outline. Then meet in advance with your participants to review the role that each person will have: whom will say what and when; who will ask for support; and who will respond to the prospect's reply.

Be sure to rehearse the solicitation call. I began to do major gift fundraising, crisscrossing southern Illinois as Director of Development for the Diocese of Belleville. While driving, I would rehearse out loud that key solicitation sentence, so that no matter what the circumstances would be once I was engaged with the prospective donor, whether I felt nervous or fearful, all I had to do is begin that sentence I had memorized and practiced repeatedly in my car, and out it would flow. Rehearsing empowered me to ask for funding for our organization.

For many years it has been my practice to review an upcoming solicitation call with a colleague. During this conversation I would talk about the call, the purpose of the call, what I hoped to accomplish through the call. Frequently, I would rehearse the key sentence or sentences I planned to use and get their input. I found this practice to be most helpful. Upon my return from the visit, I would share with that colleague how the call went and what I learned.

When you bring others with you, prepare them in advance for the solicitation call. It is time well spent to meet with them, to walk through how you have planned the call and what you want them to communicate according to the visit outline. When it is time, go and lead the meeting and call upon your fellow representative(s) to engage with the prospect as you had planned. At least in my case, I most always left the solicitation and the consequent discussion for me to handle.

Sometimes it is wise to go on a call by yourself. You may judge that it is essential to create a certain intimacy to obtain a full disclosure between the prospective donor and yourself. In such calls, it could be that an additional person could complicate the goal for the discussion and the outcome that you desire to have. Sometimes the dynamics of a third person can inhibit the prospect from being fully honest, direct and frank with you in the solicitation conversation.

On the other hand, bringing others for additional perspective and insight in terms of what you are asking the person to support can help you accomplish your purpose. Also, bringing someone along for training purposes can be very helpful for their development in the work of major gift fundraising. Finally, sometimes bringing an additional person can create additional positive pressure within the prospect as they consider your request for support.