1. **Build rapport.** Chat a little. Start with topics having no bearing on your organization or fundraising campaign. “Who’s your job?” What are your kids doing these days? I notice you’ve got your garden in; what are you growing this year?” Don’t spend a lot of time on idle chatter—the meeting could get away from you—but it’s good manners to ease into the topic at hand.

2. **State your goals for the meeting.** This step is optional but recommended. You might say, “Margarita, I’ve come today with three things on my mind. One, I’m here to tell you about our work. Two, I want to learn more about you and your interests. Three, it’s my responsibility to ask for your financial support. To tell you the truth, I’d like to know why you’re interested in our organization, so let’s start there.” This provides a clean segue into the next item.

3. **Uncover the person’s needs and interests.** Find out why he or she cares about your work. For a donor, the questions might be, “You gave us $500 last year, which is a big gift. Why did you do it? Why do you care about this issue?” When talking with a prospect who is considering a first gift, perhaps you can ask, “What’s your experience with our work? Why does it interest you?” Initiate a dialogue by asking questions.

4. **Present your organization: your goals, programs, and what the donor’s gift could accomplish.** Provide “inside information.” Tell stories. Where relevant, cite statistics. Keep it brief; don’t overwhelm the person by reciting your 14-point strategic plan. If you have visuals that tell your story—maps, graphs, photos, charts, or site plans—this is an opportunity to use them. Encourage questions.

5. **Ask for the gift.** Look the donor directly in the eye. Be clear, explicit, and straightforward. “Sally, as I mentioned in the letter, would you consider a gift of $1,000 to support our work? Your gift would have huge impact in the community. What do you say?” As an alternative, “As I mentioned in the letter, we’re seeking gifts of between $500 and $5,000 toward a goal of $50,000. I appreciate that this is a wide range—the amount is up to you. Please give as generously as you can.”

Once you’ve asked for the gift, wait—**keep your mouth closed.** Don’t make excuses or start to backpedal before the donor has had a chance to respond. Just sit quietly and wait.

From: *Train Your Board (And Everyone Else) to Raise Money*, 2014 by Andrea Kihlstedt and Andy Robinson
6. **Deal with any objections.** Some of the objections you’ve answered by phone are likely to come up again now. Think in advance about these objections and how you might respond. For example, if the person says, “You’re asking for more than I can afford,” you can reply, “The amount is up to you. I hope you will give as generously as possible. What do you think you could afford?” In response to, “I’m unable to give right now,” you could say, “Another option is to make a pledge now and pay later. If that works for you, it works for us.” Most of these responses are nothing more than common sense, so:

- Take a breath
- Ask yourself, “What’s the logical response to this concern?”
- Respond accordingly

7. **Close the meeting.** Restate any agreements you’ve made so both parties leave with the same expectations. Once again, be clear, explicit, and straightforward.

8. **Report your results** to the fundraising staff or campaign chief to ensure appropriate follow-up with the donor.

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