



Donor Meeting Planning Guide

	Write Your Responses Below
1. Donor name:	
2. This donor/prospect is in which step of their decision-making process? Attention, Interest, Desire, Action, Gratification	
3. What type of personality does this person have?	
4. Meeting objective: <ul style="list-style-type: none">• What new information do you hope to learn during the meeting?• What action do you hope the donor/prospect will commit to during this meeting?	
5. Open the meeting <ul style="list-style-type: none">• Greeting/Social question(s)• Donor-centered purpose of the meeting <i>(e.g., "The reason I wanted to meet with you today is...")</i>	
6. Questions to ask: List 3-4 open-ended questions you plan to ask during this meeting. (Remember to drill down.)	
7. Benefits of programs/initiatives: What if any programs/initiatives do you want to explain during the meeting?	



Donor Meeting Planning Guide (Continued)

	Write Your Responses Below
<p>8. Ask for the Gift (OPTIONAL) Write the Benefit Statement you will use to ask for the gift if the time is right.</p>	<p>I know that _____ _____ is important to you. I'm suggesting a gift of (amount/type of gift) _____ to support _____ _____ Here's what giving this gift will mean for you: _____ _____ Can you commit to this?</p>
<p>9. Manage Objections/Concerns List any objections or reservations you think the donor/prospect will raise and how you will address them.</p> <ul style="list-style-type: none">• Acknowledge• Ask questions to learn more• Respond with a problem-solving approach• Confirm donor/prospect's agreement	<p>Objection/Concern:</p> <ul style="list-style-type: none">• Acknowledge: (e.g., "That's important. Let's talk about it.")• Ask questions to learn more:• Respond (Use a problem-solving approach):• Confirm donor/prospect agreement: (e.g., "Does that address your concern?")
<p>10. End the Meeting</p>	<p>Summarize and confirm details:</p>