



Four Steps to Effective Solicitation

Solicitation is not a sales process. It is a time for you to visit with friends and prospective donors and share helpful information about the mission. No experience is required for those making the visit. You simply need to be willing to share your perspective.

1. Set the appointment

Sometimes this is perceived to be the most difficult part of the process. It involves the first contact with a prospective donor, and there are often questions that arise about the nature of the appointment. Relax and don't oversell. You are asking for some time (30 to 45 minutes) to discuss the nonprofit mission you already know he/she supports. It is too important to do over the phone or through the mail.

2. Prepare

Take time to review the proposal and practice your request. It shouldn't be too polished, but should come from the heart. If you are bringing someone else with you, talk with them ahead of time and review the agenda for the visit so that you work together.

3. Make the visit

The visit itself is the easiest part, and you will enjoy your time with each prospective donor. Just relax and remember that you are there representing a noble mission and organization in which you believe. You are not asking for any personal gain.

The visit has four elements:

- Casual conversation
- Tell the story
- Make the "ask"
- Handle the response

4. Follow up

It is during the follow-up visit that most gifts will be made. When the prospective donor is prepared to offer a decision, receive it gratefully.