

13 STEPS TO ENSURE YOU GET THE VISIT

1. **Send a letter.** I believe it's important that you let people know that you will be calling for an appointment. You can sign the letter or it may be more effective coming from the CEO or the Chairman of the Board.

I have some sample letters that go with these 13 steps. Choose one that most closely fits your organization and tweak it as you wish. The letter really sets the table for your phone call. You will notice in the letter that I say the person will not be asked for a gift at this time. You may not, however, have the luxury of two visits. Change that in the letter if this is your situation.

2. **Stand.** Making the phone calls can be stressful. Plenty stressful! I have a surefire way to eliminate the stress. Follow me. It really works.

I want you to stand instead of sitting. If you stand, there's a different flow of energy that takes over your body. You can punch in those numbers.

3. **Put yourself in the person's shoes.** For the moment, become that person. Think like him. What is her response likely to be?
4. **Select a time of day and the place to call.** Some will be more available at their home, some in their office. For someone involved in the stock market, you need to call before it opens or after it closes. For a doctor, before she makes her rounds. You get the idea.
5. **Prepare. Prepare. Prepare.** Think about how you want this call to go. Have a strategy. Be positive.
6. **Practice.** I like to write out what I'm going to say, starting with that moment when the person answers the phone.
7. **Keep the small talk brief.** Your job is not to engage a person in conversation. Your focus is to get the appointment.
8. **Be upfront about the purpose.** On this visit, you indicate that you are not going to ask for a gift. You say something such as: "If you decide to make a gift sometime in the future, that will be entirely up to you." It's pretty much the same copy that you might use in the letter.

Let them know that you want to talk to them about some plans that are very exciting. "You are going to be as excited about the new cancer center as I am." "The new library going up in the center of our campus is the most important addition we have made in decades."

9. **Talk about the amount of time.** Let them know that you would like to have 45 minutes of their time. If they don't have that much time, take whatever they are willing to give you. My experience is that a person who is willing to give you 15 to 20 minutes will almost always expand that to 45 minutes. Or even more.
10. **Remember, you're calling to set the appointment.** Keep focused. Your job is not to make the case and certainly not to solicit.

The person you are calling may say something such as: "Tell me more about the project. We can talk on the phone." You don't want to do that. You want to get a personal visit. You need to have a response to that.

Or, "Send me some material. I'll look it over and send you a check." You need to respond with something such as: "Knowing you, I'm certain you would read the material. And then send us a check. But what we're going to talk about is so important that I feel it can only be discussed effectively in a personal visit. When is a good time to see you? Next Tuesday or next Thursday?"

11. **Be patient.** My experience is that 73% of the people voice three objections before giving you a date for an appointment. Be ready to respond.

Be firm. Be positive. You're on your way to getting the date.

12. **Establish the date.** You have gone through all of these steps. You have finally come to a point where the person is willing to give you a date. Keep in mind how important it is that you get to visit with the person. You're 85% on your way to getting the gift.
13. **Send a letter.** You got the date. Congratulations. Send a letter confirming the date and all the arrangements. My own personal preference is that I do not follow that with a phone call to confirm. I let the letter do the job.

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