

THE FOURTEEN QUESTIONS YOU MUST ANSWER[®] BEFORE A DONOR MEETING

1. Do I have all the necessary information and research I'll need on the person I'm calling on?
2. Have I thoroughly anticipated the probable donor's expectations for this meeting?
3. If substantive information or a proposal are being presented, have I previewed these in advance of the meeting?
4. Are the right people— from the donor's side and from our organization— coming to the meeting?
5. If more than one of us from the organization are attending, have we discussed and clearly clarified the roles that everyone is going to play?
6. What are the most prominent messages or ideas that I want to get across?
7. What are the different options for presenting our ideas? A brochure? Video? Proposal? Stories?
8. Is there anything I can send the probable donor beforehand that will make this meeting more productive?
9. What's going on in the donor's world right now? What pressures is he or she feeling (at work and at home)?
10. What will my donor's reaction be to what we have to say?
11. What are the objections the probable donor might pose?
12. What are the 3 or 4 key, thought-stimulating *power questions* that I plan to ask at this meeting?
13. What do I think will be the important follow-up to this meeting? (You can't leave a meeting without either a gift or a date for another meeting.)
14. How can I infuse this meeting with excitement, enthusiasm, and new ideas?

The Fourteen Questions You Must Answer[®]
—Institute for Charitable Giving

