

On the Road Again: Best Practices for Donor Visits

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How do you ensure a successful donor visit?

- Strong preparation
- Asking good questions
- Thoughtful follow up



Why meet with donors?

- Discover new prospects
- Cultivate relationships
- Solicit for gifts
- Steward existing gifts



Before a Visit

- Issues with scheduling
- Ways to contact donors
- Pre-visit research
- Establish a visit objective
- Assumptions to be avoided
- Confirmation
- Information to leave behind





During the Meeting

- Start and end with thank you
- Be clear about who you are
- Don't forget the spouse and/or other important players
- Ask open-ended questions and then listen

Visit objectives

- Learn about the donor's personal history
- Learn about the donor's engagement with your organization
- Learn about the donor's philanthropic interests and goals



In the Meeting

- Expect the unexpected
- Don't wait until the last minute to bring up fundraising



After the Meeting

- Thank them again!
- If your visit isn't in your database, it never happened.
- If you promise to follow up, follow up.



Ensuring a successful outcome

- Be prepared
- Focus on visit objectives
- Follow up thoughtfully and strategically





Questions?

Thank you!

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