



Pre-Visit Worksheet

Please take a few minutes to complete this form with your solicitation team and/or Council staff before you call your prospect.

Prospect Name: _____

Solicitation Team: _____

Date & Time of the Call: _____ **Location of the call:** _____

Step 1: Objective. What do you want to accomplish?

Ask for a gift. In the range of \$ _____

Share case for support.

Thank for exceptional support

Learn more about prospect's interests.

Close the gift.

Provide requested information and determine next steps.

Notes: _____

Step 2: Issues. What issues or questions do you need to anticipate? Business performance, spouse/partner input, investments, concerns about the program, campaign, United Way relations, youth protection, leadership standards?

Notes: _____

Step 3: Materials. What do I need to bring along?

Folder

Proposal

Council Fact Sheet

Talking Points

Pledge Form

Other _____

Notes: _____

Step 4: Who. Who is going on the call with me?

Volunteer _____

Council staff _____

Prospect's spouse/partner _____

Prospect's business partner _____

Other _____

Step 5: Scheduling. Who will schedule the appointment?

Me

Volunteer _____

Council Staff _____

Other _____

Volunteer/ Staff:	Steps:
<hr/> Name	SETTLE: (5-10 minutes) Conduct light conversation until all have a chance to focus on the meeting. <hr/> <hr/>
<hr/> Name	CONFIRM: (2-3 minutes) Confirm goal of the visit, amount of time allotted, & reiterate this is a solicitation meeting. Notes: <u>Thanks again for agreeing to meet with us to talk about Scouting in our area and your charitable support. Does it still work for us to spend about 45 minutes to an hour together?</u> <hr/> <hr/>
<hr/> Name	EXPLORE: (15-20 minutes) Thank them for past support of Scouting; ask what part of the Scouting program has had the greatest impact on them, their child, or kids in the unit; is there an aspect they most enjoy? <i>(This is important to know because if they have an interest in camping you can talk about how their contribution will help cover the operating costs of the camping program or if they have an interest in helping underserved youth, you can highlight how their contribution can be used for camperships and other scholarship needs.)</i> <u>First and foremost, we want to thank you for your exceptional support of Scouting over the years – both in terms of the leadership roles you have played (highlight) as well as the generous financial support you have provided. What motivated you to initially get involved – and then, stay involved with Scouting? What aspect of the program means the most to you?, etc.</u> <hr/> <hr/>
<hr/> Name	ASK: (5-10 minutes) Share information about Scouting in the Council – utilizing the leave behind Council Fact Sheet. But talk about the program’s impact on young people and the community – tell a story about lives changed that bring the organization and stats to life; highlight the cost of Scouting and why we need their increased support. Suggest an amount that you would like them to consider. Pause and wait for their response. Reference Recognition Opportunities as appropriate. Notes: <u>Thank you for sharing your thoughts. It is because of your dedication to Scouting and the impact it has had on the young people locally that we want to ask for your consideration of increasing their charitable support. (Where appropriate you can mention Because of the defunding by the Greater Twin Cities United Way, we are going to some of our strongest donors/volunteers/parents – who have had the opportunity to see, first-hand, the positive influence the program has had on the youth and asking them to join with us to help assure that Scouting will remain strong and continue to provide great programs for our area’s young people. We are hoping that you might consider a gift in the range of \$xxxxx. A gift of this magnitude would not only help assure that we will be able to continue to provide quality programming but will also help set the pace for others to make a meaningful gift.</u> <hr/> <hr/>
<hr/> Name	EXPLORE FURTHER: (5-10 minutes) Engage in further discussion about the program, project or gift. <hr/> <hr/>

Name _____	<p>CONFIRM & CLOSE: (3-5 minutes) Thank them for their time. If they are unable to make a commitment at that time, make plans for follow-up. (<i>When and how would be the best way for me to follow up with you regarding your decision or to determine if you need further information?</i>). (Date and method to follow-up with information or regarding a decision). Ask them if they have prospects in their network who should be added to the prospect list. Notes:</p> <p>_____</p> <p>_____</p> <p>_____</p>
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After the Visit: Once you have completed the visit, make some notes to yourself and complete applicable steps below:

Primary Info:	Spouse's name: _____ Spouse's employer: _____ Kids names: _____
Relationships:	Who knows this person? _____ Who does this person know? _____
Secondary Info:	Other facts – Family or Work: _____ _____ _____ Insights or New Information Determined: _____ _____ _____ Other interests outside of Scouting: _____ _____ _____ Areas of interest inside of Scouting: _____ _____ _____ Action/Outcome/Results of Call: _____ _____

- Next Steps/Action to be Taken/By Date: _____
- Send information to prospect about _____
- Return completed pledge form to the Council
- Write a thank you note
- Schedule next appointment for follow-up on _____