National Urban League

Solicitation Preparation

A solicitation meeting should be treated as a formal, professional business meeting. As such, time should be reserved to carefully prepare well in advance of the meeting. As the Affiliate prepares for a solicitation meeting, it is essential to consider the following:

1. Who is "best" solicitor?
2. Who can influence the gift-making decision?
3. What should the size of the gift request be?
4. Has the prospect made a gift to the Affiliate in the past?
5. What is the prospect's giving history?
6. Has the prospect given to similar organizations and/or projects?
7. What aspect(s) of the Affiliate's case would appeal most to the prospect?
8. Is there anything at the Affiliate that already recognizes the prospect for previous support? Has the prospect been recognized by other organizations?
9. What gift recognition should be presented?
10. What is the best solicitation strategy?

Consideration of the previous questions can help to develop a strategy that may prove more impactful. In addition to completing the aforementioned process, it will be important to do the following prior to meeting with the prospect:

1. Review and understand meeting materials, including the Affiliate's **marketing materials** and **"solicitation kit."**

    a. Request letter
    b. Personalized solicitation proposal
    c. Case statement or brochure describing the Affiliate, programs, etc.
    d. Description of a specific commemorative opportunity for the prospect's consideration, if appropriate
    e. Suggested letter of intent or major gift pledge agreement form
    f. Business cards and/or contact information of all members of the solicitation team

2. **Know the prospective donor** by studying the prospect's profile and making sure that any prospect research is current.

3. Understand the **facts of the initiative** or area for which the Affiliate is requesting support.

4. Know what the Affiliate is requesting and be familiar with the **components of the request**.

5. Locate and confirm a **private meeting location**.

Each solicitor will impart his or her own techniques or methodologies when conducting a solicitation meeting. Timing and resources (e.g., availability of Affiliate staff) may not always allow for the Affiliate to complete all steps listed above. However, there are five (5) considerations that, to the extent possible, should be considered "non-negotiable" in conducting a solicitation meeting.

1. The solicitation meeting should be personal and private and held in-person in a quiet setting. Only members of the solicitation team should be permitted on the solicitation visit.

2. Careful thought should be put into determining the materials to present to the prospect.

3. All members of the solicitation team should be prepared for the meeting and use the personalized proposal as a guide.

4. The solicitation team should rehearse and practice the "ask" by using briefing meeting materials and the solicitation meeting script.

5. As part of the process, there is the opportunity to role play, anticipate possible objections and responses, determine the roles of each member of the solicitation team and clearly state the impact of the prospective donor's gift.