



PORTER CAESAR, LLC

Strategic & Fundraising Counsel to Non-Profits

New Hampshire Library Trustees Association

Phone Call Tips for Setting Up a Solicitation Visit

Overall

- Don't procrastinate about making your calls
- Make your call with positive, upbeat energy.
- Assume the donor will say yes to a meeting
- Stand up during the call. This will help you convey more energy.
- Don't give in to making the solicitation over the phone. Do everything you can to set up a personal visit, emphasizing the importance of this project to you personally.
- Keep the initiative by suggesting times and dates
- Remember, you are not asking for yourself – it's for the community and the Library.

Just do it. Make the call promptly to get it done. You'll be great! Here's some language you may want to use:

Hi, *Judy*, this is *Polly Jackson* calling.

As you may know, we're really excited at the Library about [*the new wing we are going to build*] and the very real effect it will have on the quality of life here in *Readersburg*. I'm proud to be playing a part as a volunteer with this project which we will feel will have such positive impact on so many at-risk kids here in town.

Sue McPheeny and I are hoping that we can come and visit with you (and *spouse/partner*) for 45 minutes to bring you up to speed with all the activity at the Library and invite your participation in supporting the effort. We'll bring along some materials to share with you and answer any initial questions you might have about the program.

Is there a good time when *Sue* and I might stop by in the next couple of weeks?

Variations:

- a. If they say, "We'll participate – just send us the material and a pledge card..."
 - *Judy*, this is such an important step for this community that you (and *spouse/partner*) should really know about it firsthand.
 - It won't be a high-pressure sales pitch, for sure. We just want you to know about our plans. We think you will *want* to participate in supporting

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the Library, but whether you do – and at what level -- is, of course, entirely up to you.

b. Voicemail message

- The first or second time you are sent to voicemail, we recommend you hang up and try again to contact them directly.
- The third time, you may choose to leave a voicemail message, which could go something very much like the recommended conversation above:

Hi, *Judy*, this is *Polly Jackson* calling.

As you may know, we're really excited at the Library about [*the new wing we are going to build*] and the very real effect it will have on the quality of life here in *Readersburg*. I'm proud to be playing a part as a volunteer with this project which we will feel will have such positive impact on so many at-risk kids here in town.

Sue McPheeny and I are hoping that we can come and visit with you (and *spouse/partner*) for 45 minutes to bring you up to speed with all the activity at the Library and invite your participation in supporting the effort. We'd bring along some materials to share with you and answer any initial questions you might have about the program.

I'll give you a call back later today or tomorrow in hopes of touching base with you personally, or perhaps you could get back to me if you have the chance at 555-1234.

I really look forward to getting together with you (both) to share our plans.

Thanks so much, *Judy*. Talk to you soon.

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