

Scheduling Visits is Scary... But it Doesn't Have to Be That Way



Kevin Fitzpatrick,
The Major Gift Coach



Believe your org is the best

“When I fully believed that we were the best investment firm in the world, my business tripled in 2 years.”

-Phil the Philanthropist

Tips for Scheduling Visits

- ⊕ Smile and stand up!
- ⊕ Use your cell
- ⊕ Use a headset/headphones

Tips for Scheduling Visits

- ⊕ Prepare your list
- ⊕ Schedule it on your calendar
- ⊕ Track Everything

Tips for Scheduling Visits

- ⊕ Be bold
- ⊕ Be direct
- ⊕ Be brief

Don't Ambush People

You have to be clear why you're meeting.

Disclaimer

Only use this EXACT script for people in your database that you do not know well personally. The better we know someone the less formal we have to be.

Script for Scheduling Visits

Good morning, Jill, Kevin
Fitzpatrick with Acme Nonprofit.
The reason I'm calling you today
specifically is to schedule a visit
regarding Acme Nonprofit. How
does next Tuesday at 10:00am
look for you?

Leaving a Voicemail

Good morning, Jill, Kevin Fitzpatrick with Acme Nonprofit 555-555-5555. The reason I'm calling you today specifically is to schedule a visit regarding Acme Nonprofit. How does next Tuesday at 10am look for you? Please feel free to call me back or text me at 555-555-5555.

Texting

- ⊕ My 92 year old grandma texts
- ⊕ AKA EVERYONE texts
- ⊕ Use the same script as the phone

Email

- ⊕ Use the same script
- ⊕ Use a familiar name in subject line

What's at Stake?

“My husband and I have a rule that we will meet with anyone who reaches out to schedule a visit with us.”

-\$10 Million Donor

Time to Schedule a Visit!

Information is pointless if we don't put it to use.

Referrals

There is no greater advantage to getting a visit scheduled than having a peer's endorsement.

Objections

- ⊕ Say something!
- ⊕ Affirm their objection
- ⊕ This is not your only chance

Stop Making Excuses

Start Making Calls. You're One Visit Away from growing your mission and your impact.