

# DONOR VISIT CHECKLIST

## DESCRIPTION

Meeting with \_\_\_\_\_

Location \_\_\_\_\_

Date/Time \_\_\_\_\_

Purpose \_\_\_\_\_

BEFORE	DURING	AFTER
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- Add to calendar
- Make travel arrangements
- Obtain donor research info
- If joint meeting, coordinate with others
- Info packet with business card, gift/pledge proposal or agreement if appropriate, and other items
- Print itinerary or test in GPS
- Review database info
- Other meeting prep: roleplay/briefing
- Get rested up!

- Arrive early, with materials
- Casual conversation, of interest to prospect/donor
- Guide conversation to meeting objective
- Active listening - "fill in blanks" about family, career, interests, resources
- If meal is involved, stay on top of payment logistics
- Thank for time and support
- Inform on next steps

- Mail/email (handwritten) thank you note ASAP
- File contact report in database
- Input proposal or pledge/gift agreement if appropriate
- Pursue follow-up items with donor
- Distribute information internally
- Determine next steps
- Voucher travel/meal expenses

Notes \_\_\_\_\_



Checklist provided by  
Louis Diez  
Muhlenberg College

To find more helpful checklists,  
check out Louis' blog at [www.marktlab.com](http://www.marktlab.com)



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