Tactics for Optimizing Donor Meetings

A Virtual Professional Education Experience for Development Professionals

This four-hour workshop focuses on planning for and executing impactful in-person and virtual donor meetings. Participants will work together in small groups to discuss and develop a micro-strategy for their next meeting with a real-world potential donor using the five-step process for an effective donor meeting.

Recommended Preparation: *The Art and Science of Donor Development*

Syllabus

Introduction
Participants experience a brief review of donor motivation, the Donor Commitment Continuum, the Donor Development Chart, and methods for securing meetings with donors.

Preparing for a Donor Meeting
Participants discuss how to set objectives in preparation for meeting with donors. They also explore the challenges of conducting meetings virtually, with key tips to optimize the virtual setting.

Facilitating a Discovery Meeting
Participants examine the five key steps for effective donor meetings, in-person or virtual, utilizing High-Value Questions and tools for presenting organizational priorities.

Involving Key Partners

Participants explore a model for a collaborative meeting that leverages the strengths of key organizational partners. They also learn points for preparing to host a meeting with multiple attendees—both in person and virtually.

Structure

Classroom Engagements

Participants will experience the four-hour workshop in a real-time virtual classroom. This session features networking opportunities, application exercises, and interactive facilitator support. Participants should be prepared to attend the entire session, as this is not a webinar, and interactivity is essential to the success of the experience.

Technical Requirements

Participants should use the Zoom™ application, following download instructions as prompted from the web browser of their choice. Participants should be prepared to use headphones with a microphone and/or speakers, a keyboard, and a consistent Wi-Fi connection.