

Sample Phone Script Requesting a Meeting

Version for someone you don't already know

Ahead of time:

- Line up your thoughts about what you know about this person (in preparation for what to do if they are resisting getting together).
- Have suggested dates and times ready before you call.

Opening

Hello, is this x? Hi x this is YOUR NAME, YOUR ROLE WITH YOUR ORGANIZATION.

Do you have just a minute to talk?

If yes:

Great.

Thank you so much for your SOMETHING TO THANK THEM FOR, SUCH AS POST DONATIONS, VOLUNTEERING, EXPRESSING AN INTEREST, ETC.

One of the things I most like about working/volunteering for the ORGANIZATION is I get to meet people who share my passion for protecting SOMETHING SPECIFIC.

I'd love to sit down with you to share our vision, get feedback on our plans, and discuss whether the ORGANIZATION is one you'd like to get more involved in for the coming year.

Can we get together on DATE/TIME?

If yes, great, go to wrap up

If one of the various ways people might say no, without being an absolute no, listen and respond. See below for examples. Remember to generate interest!

IF APPROPRIATE: ASK QUESTIONS TO GET THE DONOR TALKING.

If they say they will be out town, have to do something with their kids/grandkids, gently ask questions about those activities and share relevant personal information: "my niece just turned 11 on Saturday!"

Ask questions about THE ORGANIZATION: e.g. Did you hear about our work last MONTH/YEAR doing SOMETHING YOU DID.

Based on their response, pivot back into something like:

I'd really love to talk to you more about this in person. It's a great way for me to learn about how the ORGANIZATION can best make a difference. Can you make a little time on [day, date, time]?

If still no:

I am sorry this is a bad time for a meeting. Again, THANK THEM FOR SOMETHING IF THERE'S SOMETHING APPROPRIATE.

Option 1: The ORGANIZATION can't accomplish its goals without involving more people from the community. I'll stay in touch and hopefully we can meet next year.

Option 2: Although you aren't able to meet, the ORGANIZATION is at a key juncture. MENTION ONE THING THAT'S URGENT AND ASK THEM TO DO ONE SPECIFIC THING (WRITE A LETTER, SHOW UP AT AN EVENT, MAKE A DONATION, ETC.).

If yes, to wrap up:

Agree on location and get/give directions if necessary

Confirm again the day, date and time

If the visit is not in the next week ask: Do you need a reminder call?

Thanks again!

What to say when they say...

I am really busy, that is not a good time for me.

I know how it is. I'm calling you now because I really want to get to know more people who **WHATEVER CONNECTS YOU TO THEM OR MAKES YOU FEEL LIKE THEY'D BE A GOOD PROSPECT**. We're making real progress and I want to share our strategies.

Our meeting won't take long—no more than 30 minutes. Can you make a little time on [date]?

This is a bad time to talk.

I'm sorry I caught you at a bad time. I was calling just to see if we could schedule a time to meet in person to talk about the **ORGANIZATION**. Can I call you back in an hour or would tomorrow be better? (Is there a number where I could call you during the day/evening?)

Can you mail me something?

I'd be happy to put something in the mail, but I really appreciate the chance to talk with folks face to face. It's a great opportunity for me to get away from the computer and phone and figure out how the **ORGANIZATION** can make a bigger difference. And I'd like to talk about your becoming more involved with the organization, which feels more appropriate face to face. Can you make a little time on [date]?

I don't take phone solicitations.

This is not a phone solicitation. I was hoping to sit down with you face to face discuss our work and figure out if it matches your goals. The Center's at an important point in its history and I want to share our plans with more people to get their feedback. Would you have time to meet on [date]?

I love you guys. I'm already planning on volunteering for/donating to you. Don't waste your time on me.

Thanks, but in no way is this a waste of my time. Meeting our supporters is one of the things that keeps me excited about our work. The ORGANIZATION is at a critical juncture and we think it's important to talk with more folks in the community to see how they want to get involved. Can you make a little time on [date]?