

10

**PERSONAL
FUNDRAISING
POWER**

OF
17

Influencing Donors



**Bright
Spot**

The Members Club

THE FUNDRAISER'S MEETING CHECKLIST

The Fundraiser's Meeting Checklist

How the Checklist helps you relentlessly improve your skills, meeting by meeting.

As you study different ideas to improve your skill when meeting donors, there are two obstacles which could get in the way of the meeting going well.

We might forget what we had planned to say / do and we might obsess on the techniques, rather than giving our attention to the donor.

Checklist, by Atul Gawande explores the amazing difference that checklists have on performance in fields such as medicine and the airline industry. Importantly, however experienced and skilful you may be at something, research shows that using checklists reduces mistakes and improves performance. Doctors said that if they were to be operated on, however experienced the surgeon was, they would still want that surgeon to use a checklist, because the human brain has a tendency to be both fallible and over-confident).

How to be present and at your best in every donor meeting

After preparing for your meeting, look at each of the items on the left hand side, to remind yourself of key steps or ideas you have prepared in advance. Ticking each item off in the middle column helps both to remind you of the idea, and to help you let go of the details, because you know that you are as ready as you can be. Now, on the way to the meeting rather than getting stuck in your head, obsessing about particular things to say you can focus your attention outwards. This focus will help you be fully present and interested in others when the meeting starts.

Learn from and build on every meeting.

Following the meeting, however well or badly it went, make 10 minutes to review each element of the meeting. Do this using the right hand column of the checklist. This helps you take a balanced view and notice what you did well. Often the human brain can over-look these things and this tool to help you notice and appreciate the positives is great for your confidence and sense of progress. This sense of progress is so important, not least because many factors in these meetings are beyond your control, and many meetings will not go exactly as you'd have liked. So it's essential that you keep track of something you can control, which is your own progress.

And almost certainly some element of the meeting will not have gone as well as you'd have liked. The checklist will help you work out what this might be, so that you can decide what one or two things are most in need of improvement or extra research before your next meeting. Deliberately pausing to review your meetings in this way will help you continue to keep getting better and better in the areas that would otherwise reduce your chances of success.



The Fundraiser's Meeting Checklist

Meetings with (potential) donors / supporters - plan to succeed and learn every time

Name of meeting	Date
-----------------	------

Element of the meeting to prepare	Before the meeting:	Following the meeting: check how well you performed. Score out of 10. What did you do well? What could you do to prepare / do this element even better next time?
Expect (and imagine as vividly as you can) a specific, positive outcome. Clarity is power.		
Get in a good state . Could include: before the meeting, smile, even if you don't feel like it. Listen to music to put you in a good mood? Movement? Confident, upward body posture and calm, deep breathing.		
Focus on give not get. Ask yourself, how can I conduct this entire meeting in such a way as to help the other person?		
Plan to understand and appreciate their world, before you say much. Plan for helping them talk and feel listened to early (eg brief summary and question(s) so you don't say too much).		



The Fundraiser's Meeting Checklist

Continued

<p>Really listen. Understand; care; do not judge.</p>		
<p>Match – say things (about your charity / fundraising opportunity) that build on, are relevant to what they care about. Have you prepared persuasive ideas on likely topics (eg using the Magic Formula questions)? Are you able to tell brief examples / stories? To invoke the problem before describing the solution in any depth? To show that your solution works?</p>		
<p>Confirm question. This is a closed, ie 'yes' or 'no' question about the value of the topic (eg the service/project) you just explained. ie once they say 'yes, that makes sense...' then your ask becomes much easier. If they say 'no', find out what you still need to solve / re-frame for them.</p>		
<p>Ask. Really it's an offer of something in their interests for the next step</p>		
<p>Next step. Clarify what the next step will be (eg date of phone call / meeting)</p>		

You've been working on:

10
OF
17

PERSONAL FUNDRAISING POWER
Influencing Donors

