

Setting the appointment

When you call your prospect to set up a legacy conversation:

1. Introduce yourself and your affiliation with your agency
2. Tell them you're working on the Create a Jewish Legacy committee
3. Update them (status of initiative – number of pledges towards the goal)
4. Explain that you would like to meet to talk further about your agency's plans and how they might participate
5. Set up a time and place to meet (wherever and whenever is best for them)
6. Let them know if someone else will be joining you at the meeting to help answer their questions

Face-to-Face Solicitation Checklist

- Know why you are doing this
- Make your own legacy pledge first
- Know your legacy case statement
- Know your donor – their motivations and giving history
- Meet/solicit your donor face-to-face (set up a realistic appointment calendar)
- Go with a partner when you can – but with the right one.

Make a compelling ask. A good ask is a combination of factual material, emotion, stories, personal experiences, and a call to action. Make a seamless transition from the donor's story to an ask.

Active Listening Tips

1. Maintain a comfortable level of eye contact.
2. Paraphrase. "So what you are saying is..."
3. Focus. Try not to scan the room. Be present.
4. Stay open-minded.

Legacy Conversation Script

In the meeting: (Sample time frame of 30-60 minutes)

It's a good idea to verify how much time you have for the conversation.

- **Thank them** - for their time and for their past support – 1 minute
- **Schmoozing/ice breaking**:- 5-10 minutes
 - how is their family, how are they... the common chit chat that people do in the beginning of a conversation
- **Tell them what you're going to tell them.** – 3-5 minutes:
 - Learn more about their connection to your agency
 - Talk about what is new at your agency
 - Tell about the legacy efforts
 - Give them the legacy brochure
 - Ask for their participation
- **Ask questions** 5 - 10 minutes
 - What are your favorite things about the agency?
 - Do you have any questions about the agency?
- **Speak the vision** – 5-10 minutes
 - The vision of the agency – strategic plan, its success, growth and vision for the future
 - Why this is important to you, the solicitor
- **Invite them to partner in this vision** – 2 minutes
 - Ask them: Would you consider giving a legacy pledge to help us?
 - **Silence** - allow time for a response (avoid the nervous instinct to talk after asking!!)
Listen
- **Plan for follow up** – 5 minutes
 - If yes, great! thank you so much
 - If maybe, Ask what's in the way, is there any information I can get you that would be useful in helping you decide?
 - If they need more time, then set up that next time to meet
 - It is very important that you take the lead in the follow up. As long as they didn't say no, ask them if it's okay to check in with them at a specific time (a few weeks). Do not wait let them say that they'll get back to you: it is much more difficult for you to contact them without seeming pushy.
- **Thank them for their time and considering your request (or saying yes!)**

Immediately after the meeting:

- Drop them a thank you note expressing your appreciation of their time.
- If you are going to follow up with them in some way, indicate that as well.
- Take some notes immediately after the meeting. This is important, it's surprising how much can be forgotten. Especially make note of things that the prospect requested and be sure to make those things happen. Send these notes back to the staff!