

Leadership Touch Training

How a Leadership Touch is Conducted (from Start to Finish)

“Preaching to the choir” – The Leaders’ Society Donors we will be meeting with give at the leadership level (\$1,000 or more) with 50% or more going to Community Impact... These are truly are best supporters and community friends!

Take a moment to think about someone that you had to get an appointment with, how did you do it?

I. Getting the Meeting

- a. Preparation
 - i. Enterprise Notes/Information from past Investor Relations Managers
 - ii. Script for call – a couple sentences – win them over
 - iii. Plan (How often and when will you call)
- b. Making the Call
 - i. Identify Timing
 - ii. Identify the number of attempts you will make before leaving message
 - iii. Personal style – Be yourself, genuine and sincere, they will feel it because it will come across, even over the phone... Smile.
 - iv. Making ‘The Ask for the Meeting’ – be ready for them to say yes! (Let them feel the importance of their feedback, their value and the urgency of the meeting.)
 - v. Called to say **thank you**....Would like to know if you would be available for a brief meeting.....Scheduling 15-20 minutes – I want to be respectful of your time and know you are busy..... as a community leader in giving we really need your feedback to stay on track with what our donors think the needs are in our community.....it would really help us out....I would really appreciate the opportunity to meet you, bring you some information and **thank you** in person.....

II. The Leadership Touch Meeting

- a. Preparation (What to review and prepare to bring with you)
 - i. Research – Enterprise, Google, etc.
 - ii. Leadership Package (Available through Shannon or Terri)
 - iii. Map Quest – allow plenty of time so you are relaxed, not rushing (you may want to double the stated travel time)
 - iv. Leadership Questionnaire and Personal Donor Information (Contact Information and Recognition Name)
- b. Leading the meeting
 - i. **Thank them!**
 - ii. Leadership Questionnaire

- iii. Tip's for the meeting: Communicating – 80/20 - Listening to them makes them feel valuable and appreciated, and when they are talking you get the information that will link them back to OCUW and our Community Impact work
- iv. Update their Contact/Recognition Information
- v. **Thank them again!**

III. Follow Up

- a. Enterprise Note
- b. Send any follow-up information that you have promised or was discussed
- c. **Follow-up 'thank you' email** (or note if no email & appropriate)