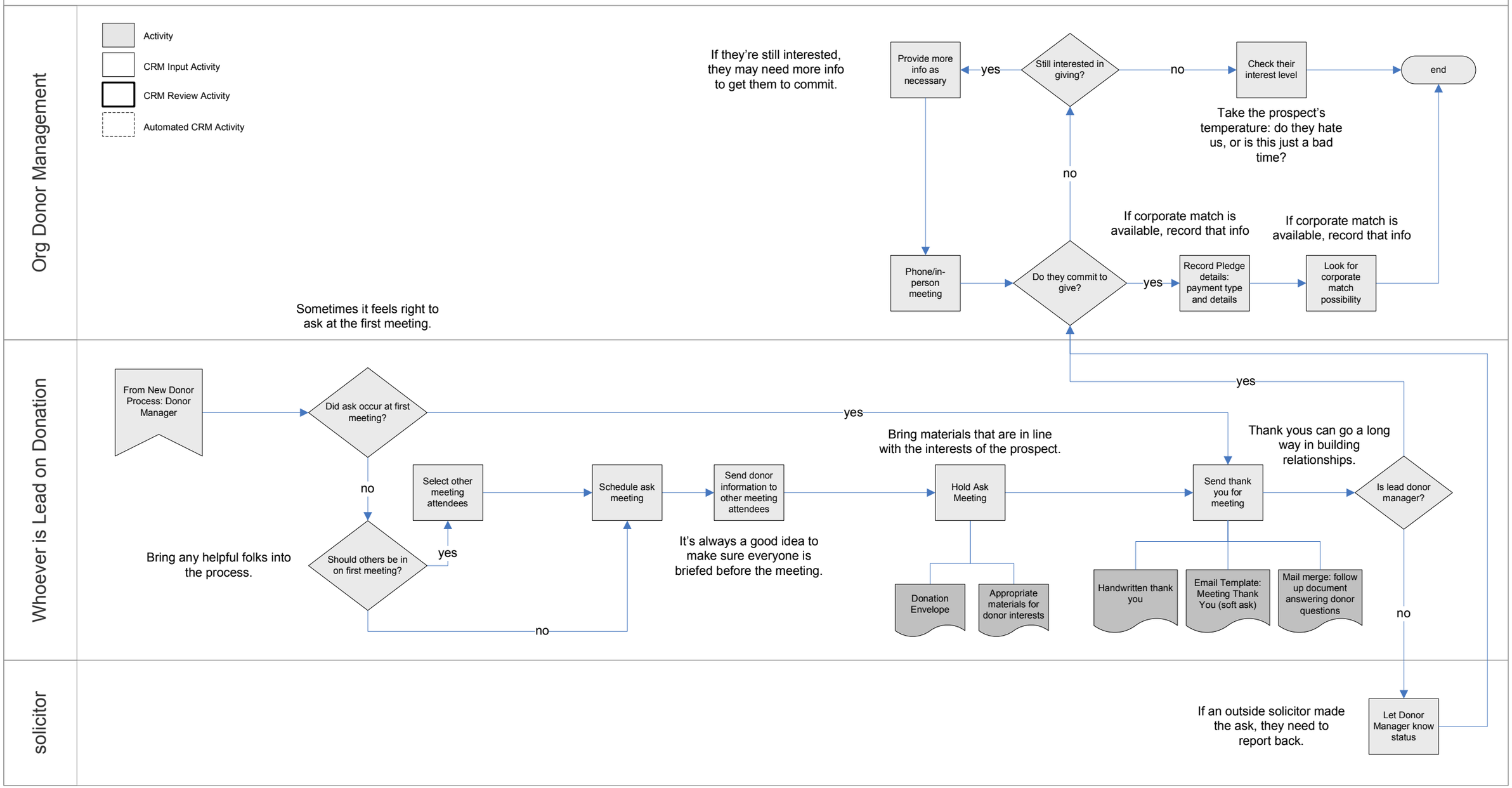
Ask Process


Org Donor Management
Activity
CRM Input Activity
CRM Review Activity
Automated CRM Activity
If they're still interested, they may need more info to get them to commit.
Provide more info as necessary
yes
Still interested in giving?
no
Check their interest level
end
Take the prospect's temperature: do they hate us, or is this just a bad time?
no
If corporate match is available, record that info
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Phone/in-person meeting
Do they commit to give?
yes
Record Pledge details: payment type and details
Look for corporate match possibility
Sometimes it feels right to ask at the first meeting.
Whoever is Lead on Donation
From New Donor Process: Donor Manager
Did ask occur at first meeting?
yes
yes
Bring materials that are in line with the interests of the prospect.
Thank yous can go a long way in building relationships.
no
Select other meeting attendees
Schedule ask meeting
Send donor information to other meeting attendees
Hold Ask Meeting
Send thank you for meeting
Is lead donor manager?
Bring any helpful folks into the process.
Should others be in on first meeting?
yes
It's always a good idea to make sure everyone is briefed before the meeting.
Donation Envelope
Appropriate materials for donor interests
Handwritten thank you
Email Template: Meeting Thank You (soft ask)
Mail merge: follow up document answering donor questions
no
no
solicitor
If an outside solicitor made the ask, they need to report back.
Let Donor Manager know status