# During the Meeting

Congratulations, you have a meeting scheduled! Here are some tips for a successful face-to-face solicitation.

## What to Bring

Bring helpful resources with you to your meeting. They will serve as a good conversation starter and leave-behind material:

* 2023 Community Campaign One-Pager
* 2022 Impact Report
* 2022 Donor Honor Roll

## The Conversation

**BE CURIOUS**Jump into the conversation with open-ended statements and questions: “Tell me about your first gift to Federation.” “What are you most passionate about?” “What challenges do you see in our Jewish community?” “What part of Federation’s work interests you the most?”

**BE A GOOD LISTENER**Let their stories and experiences lead your conversations into a larger discussion about community needs. You might meet people who have been personally impacted by Federation’s work and don’t even realize how we have been involved with their life or the lives of those they care about.

**BE CONFIDENT**Depending on your prospect’s giving history, there are a few different ways you can make “the ask.” Ideally, each prospect you meet with will make an increase to their gift.

## The Ask

* Thank them for their past generosity
* Share why you personally give or what inspires you about the Federation’s work
* Keep a specific ask in mind but be prepared to adjust (up or down) depending on what you learn in your conversation
* Ensure that you’re asking for a family gift, not just something from that individual – “we’d like to ask you and [insert spouse] to consider a gift of X”
* Share our effort to secure multi-year pledges so the Federation can plan ahead and see if they would pledge their support for next year as well
* Reference our special initiatives and see if they’d consider an additional gift to one of them