

I How To Make a Virtual Ask

The principles of relational fundraising are the same, even if you can't meet in person!

Two important rules:



- 1** Always let them know ahead of time if you plan to ask for a gift.



- 2** Always ask them for something they can say "yes" to.

Five Steps for a Virtual "Ask"

1 Prepare

- What have they given in the past?
- What have they given to others?
- What's going on in their life?
- What about your mission are they most passionate about?

2 Invitation

- The main objective is to get the meeting
- Clarify the purpose of the meeting and the time needed
- Invite the spouse!

3 Prepare for the virtual meeting

- Confirm that they're able to use the technology (e.g., Zoom)
- Ensure your internet connection is reliable
- Appropriate background, clothing and lighting
- Presentation tool for the case (e.g., Flipsnack)
- Review notes from previous meetings
- Prepare your questions

4 The Meeting

- Clarify the length of the meeting
- Remind them of the purpose of the meeting
- Enjoy some small talk
- Transition to the main point of the meeting
- Usually, ask for a range, not a specific amount
- Be enthusiastic!

5 Follow-up

- Always leave the ball in your court to follow up
- Follow up like you said you would!
- Document your meeting right away
- Always say thank you!