



Pre-Visit Checklist

1. Giving History and key points from any previous interactions

2. Consider pre-visit moves:

- Handwritten note confirming meeting
- Note or Phone Call from President, Board Chair or other Natural Partner
- Other

Notes:

3. Type of Meeting

- Discovery
- Cultivation
- Solicitation
- Stewardship

4. Consider materials you will need such as a Case Statement or Proposal that you want to bring as a leave-behind.

5. Strategic Questions

1.

2.

3.

4.

6. Projections

Best Possible Outcome:

Minimum Acceptable Outcome:

7. Important things to remember to say or not say:

8. Day of Meeting Items to Consider:

- Call or Text to Confirm Meeting
- Gift (flowers, SWAG, etc.)

Notes:
