



Visit Report Template

General Information

Donor Name: _____

Visit Date: _____

Person making the visit _____

Vist location _____

Duration _____

1. Type of Meeting

- Discovery
- Cultivation
- Solicitation
- Stewardship

2. Strategic Questions

1. _____
2. _____
3. _____
4. _____

3. Projections

Best Possible Outcome:

Minimum Acceptable Outcome:

4. Answers to Strategic Questions

5. Actual Outcome

6. Main Points

7. Action Steps

8. Moves Management Summary

9. Talk/Listen Ratio

I talked _____% I listened _____%