Handout 6.5: Dos and Don’ts in Donor Meetings

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| **Do** | **Don’t** |
| ✓ Plan what you want to achieve from the meeting beforehand  ✓ Find out as much as you can about the donor and discuss your work that falls within their interests  ✓ Dress smartly  ✓ Arrive on time and keep within the time allocated  ✓ Find out more about the donor  ✓ Ask questions about their current areas of interest  ✓ Be prepared to answer questions about risks, impact, participation, sustainability and accountability  ✓ Provide information on your vision, approach and experience  ✓ Prepare notes and project outlines to give to the donor at the end of the meeting  ✓ Explain how your work complements the work of others and what is different about it  ✓ Be natural  ✓ Stick to what you know, and get back to donors when gaps in your knowledge occur  ✓ Take your business card or full contact details    ✓ Think carefully about who should go to the meeting to ensure that you can confidently answer a range of questions  ✓ Keep your questions and answers as clear and brief as possible  ✓ Sensitively gauge how much your contact(s) know about the area of work that you are discussing with them and pitch the conversation accordingly  ✓ Address everyone from the donor organisation taking part in the meeting, especially those who are the most sceptical and important to win around  ✓ Keep the conversation focused on what you have planned for it, particularly if the meeting is short  ✓ Make sure that actually ask for anything that you planned to ask for  ✓ Leave the meeting with a clear next step such as a pledge to submit a proposal or a date for a further meeting | × Be vague about the purpose of the meeting  × Try to give the whole history and scope of your work when there isn’t time to do it  × Go directly to the meeting from the field  × Keep the donor waiting or save the important issues till the end when there is no time left  × Criticise the donor’s work  × Ask questions to which they have already provided answers in previous communications  × Make statements without backing them up with examples and case studies from your own experience  × Waste the donors time with minutiae and unnecessary technicalities  × Burden your contact with papers at the start of the meeting that distracts them from listening to you  × Criticise the work of other organisations as a way of demonstrating what is unique about yours  × Be forced  ×Try to bluff it or provide conflicting information  × Write down telephone numbers on scraps of paper  × Overwhelm the donor with too many visitors  × Forget your audience, be too technical or use unnecessary jargon  × Assume they know nothing … or everything  × Focus only on the most ‘friendly’ person in the group  × Get side-tracked  × Finish the meeting without having achieved something, even if it is to get to know each other better  × Leave issues unresolved |