



## **Making the Appointment Role Play**

### **Legacy Team Member**

1. Your task is to call a long-time committed donor/member of your organization and secure an appointment to speak with them about the organization and the new legacy initiative.
2. Make the phone call
3. Introduce yourself
4. Schmooze a little – this is someone you know relatively if not very well
5. Let the donor/member know you are calling because they have been a long time committed donor/member of the organization and you want to share with them some of the new things that are going on. Ask them if you can get together sometime next week – let them pick the time and place
6. If the donor doesn't automatically say yes to an appointment, tell them a little bit about the effort. For example "Well, for the same reasons that you care so much about the temple, we are working on a program that will ensure that the temple is thriving for future generations." You can also add on some of the other things that are going on at the organization.
7. If the donor still tries to get out of the appointment, let them know that participation doesn't require them to give any money now or in the near future but does provide an opportunity to have a real impact on the organization both now and later. You might want to add "I wouldn't be calling you if I didn't think this was something you would want to be a part of."
8. Ask one more time if there is a time and place next week that would be convenient for them.
9. No matter what the outcome, thank the donor for their time.



## **Making the Appointment Role Play**

### **Potential Donor**

1. Your task is to speak with the legacy team member, and after some pushback agree to an appointment
2. Answer the call and respond to the team member's initial remarks – this is someone you know relatively, if not, very well.
3. When the team member asks if there is a time and place you can meet, ask them if they would just tell you over the phone as you have a very busy schedule the next couple of weeks.
4. After their explanation as to the purpose of the requested meeting say something like I am really tapped out right now and unable to contribute any additional monies.
5. Once the team members gives you some additional information, agree to meet with them at a specific time and place that works for you.



## Making an Appointment

**Team Member:** Hi Rachel, this is Emilie from the temple. How are you?

**Prospect:** Hi Emilie, I'm fine.

**Team Member:** Rachel, I am calling because you have been a long time committed member of the temple and I want to share with you some of the new things that are going on. Might we be able to get together next week?

*(If we are being donor centric then we want to let the donor pick the time and place)*

**Prospect:** Oh, can you just tell me what it is over the phone? Or, too busy, just tell me now.

**Team Member:** Well, for the same reasons that you care so much about the temple, we are working on a program that will ensure that the temple is thriving for generations.

Or, we are working on a program that assures the future of the temple

*You can also begin by naming some other things that are going on at the temple as a lead in.*

**Prospect:** I am really tapped out right now and unable to contribute any additional monies.

**Team Member:** Rachel, participation in this effort doesn't require you to give any money now or in the near future. But it does provide you with an opportunity to have a real impact on the future of the temple. I wouldn't be calling you if I didn't think this was something you would want to be a part of. Is there a time and place next week that is convenient for you?

*(Again, you don't want to decide the date and place)*

**Prospect:** Ok, Wednesday we could meet at Starbucks.