



COLD CALLING SCRIPTS AND TIPS

SAMPLE SCRIPTS: SCENARIOS 1, 2 & 3

SCENARIO 1: DIRECT CALL TO REQUEST A MEETING

You are calling to set up a meeting for yourself, and the person you want to meet with picks up the phone.

This script helps you maintain the direction of the conversation, and move the relationship forward quickly and organically by asking for a meeting on a specific day.

YOU: *Hi [name of person you're calling], this is [your name] and I'm calling from [your Organization], which does [describe mission in one sentence]. [Organization] is currently reaching out to leaders like you and scheduling brief meetings to get your feedback on the exciting initiatives that we're currently undertaking to better serve [briefly but clearly describe clients, initiative, focus, etc].*

I'm hoping you'd be willing to meet with me for about thirty minutes next week so that we can learn more about what you do, and share a little bit about [Organization]? Does Tuesday at 11 am work?

Immediately sharing a day of the week and time to meet will usually prompt the person to look at their schedule to see if they are available.

However, before agreeing to a meeting they may say "Are you coming to meet with me to ask me for money?"

The basic answer to this question is "**no.**" Of course your overall goal is to raise funds for your organization, and that's never something to be embarrassed or to lie about – But first meetings are not about asking for money. Your initial contact is about building awareness and establishing relationships.

Generally, I respond to this type of question by stating in a friendly tone,

"I never ask for money at the first meeting."

This usually receives a chuckle from the other end of the phone, and the person understands that if they take a second meeting, they could be asked for money.

SCENARIO 2: REQUESTING A MEETING FOR SOMEONE ELSE

You are calling to schedule an appointment for someone else on your team, such as the CEO, President, Executive Director, etc.

Although you're reaching out on behalf of your CEO/President, Director etc., this is still a relationship that you are making, and a potential friendship that you are beginning. Clear communication and a friendly demeanor now will set the tone for the future.

YOU: *Hi, this is [your name] and I'm calling on behalf of [your team member's name], the [title] of [your Organization]. As you may know [Organization] does [describe mission in one sentence], and [your team member's name] has asked me to reach out to you to schedule a brief meeting to get your feedback on the exciting initiatives that we're currently undertaking to better serve [briefly but clearly describe clients, initiative, focus, etc].*

Would you be available to meet with [your team member's name] for 30 minutes next week so that s/he can learn more about what you do, and share a little bit about [Organization]? Does Tuesday at 11 am work?

SCENARIO 3: SPEAKING TO A SUBORDINATE/ASSISTANT

You are calling to arrange a meeting for yourself, and a subordinate answers the phone on behalf of the person with whom you want to meet.

For this scenario, empowering the assistant with all the relevant information, and treating their time with respect can help make them your ally in securing a meeting.

YOU: *Hi [name of person you're calling], this is [your name] from [your Organization], and I'm calling for [Name of the person you want to meet]. As you may know, [Organization] does [describe mission in one sentence], and we're currently reaching out to leaders like him/her to schedule a brief face-to-face to get some feedback on the initiatives that we're currently undertaking to better serve [briefly but clearly describe clients, initiative, focus, etc].*

I am going to be in the area next week, and I'm hoping to get on his/her calendar for a quick 30-minute meeting? I promise to arrive on time and leave on time... and can even bring the coffee! Do you handle his/her schedule? If yes, does Tuesday at 11 am work?

Generally, the assistant or subordinate will work with you to find a time to meet, will state that they'll speak to the person and get back to you, or they will share the process that needs to happen in order to schedule the meeting (i.e., call back at this time, send an email to the person, etc.)

Be sure to get the assistant's name, and if possible, a direct number and email for the person you're trying to meet. Always remember that an assistant can either be your best ally, or a roadblock, depending on how you treat them. They will convey the impression they get about you and your organization to their superiors, and you want that impression to be positive!

Next up – additional practice questions!

ADDITIONAL PRACTICE QUESTIONS:

Sometimes you'll get responses that feel off-putting or intimidating. Just remember that the person is only trying to get information, and stick to your plan of getting in the room with them. Try not to get drawn into an over-the-phone conversation, and work on developing concise, but friendly and engaging answers that will keep the conversation positive and moving towards a meeting.

If they ask: "What are you coming to see me about?" Keep your response positive, and to convey that you're looking to start a conversation, not just asking for financial support. Develop replies like:

I'd like to share with you what we're doing, and find out your thoughts on it.

- or -

We have an opportunity that I think you'll be interested in, and I'd love to talk with you briefly in person and get your feedback.

If the prospect asks you to provide more details over the phone, respectfully make it clear that you'd prefer to meet face to face, but that you want to make taking that meeting as easy on them as possible. Example:

It wouldn't do justice to you or the opportunity to try to get into details over the phone. I promise you that I can keep the meeting to just 20 minutes of your time, and if Thursday would be better than Tuesday, I would be happy to adjust my schedule to whatever's best for you.

If they ask you to tell them up front how much money you're going to ask for, reiterate that this meeting is not about asking for money, it's about getting to know a little bit about each other. Such as:

I do want to talk with you about a leadership role in this important effort, but I won't be asking for a gift at this time

- or -

At some point, I do want to talk to you about your leadership role, but the purpose of this visit is just to talk with you about what we believe to be a profound opportunity, and getting your feedback.

FINAL THOUGHTS:

Your success as a fundraiser is based on forward momentum. Always having a "Next Step" that you're working towards keeps that momentum going. As the donor relationship progresses, the "Next Step" of your Big Ask will keep changing, but in the case of these cold calls, the Next Step you're looking to achieve is securing an initial face-to-face meeting.

**Think of cold-calling as a little pebble you roll down a hill, which will gather steam until it's a boulder –
Making A Difference[®] with huge impact!**