

**SOLICITATION SELF-ASSESSMENT**

*RATE YOURSELF IN EACH CATEGORY*

**I. PREPARATION** *1= Didn't do it 2= didn't prepare enough 3= I was well prepared*

1. I made my own leadership gift first	
2. I understood the campaign goals and the reason for requesting the gift	
3. I understood the importance of the amount targeted	
4. I <u>believed</u> that this gift really could make a difference	
5. I knew the past giving history and relationship of the prospect to our agency	
6. I had an understanding of areas of interest to my prospect	
7. I knew that this prospect was capable of giving at the targeted amount	

**II. THE SOLICITATION** *1= Didn't do this 2 = I felt unsure of myself 3= I was confident and performed well*

1. I met with my prospect face to face	
2. I broke the ice and opened the conversation with a focus on donor interests	
3. I presented the case for the gift in a clear, concise and convincing manner	
4. I engaged my donor in a discussion and <u>listened</u> to his/her areas of interest	
5. I asked for a specific dollar amount/ range which was the target for this prospect	
6. After I asked for the gift, I was completely silent until the prospect spoke next	
7. I responded calmly and persuasively to at least three objections (if applicable)	
8. If necessary, I asked for the gift in three different ways (total, % increase, installments)	
9. I closed the solicitation by confirming a specific gift amount with my prospect (or with a specific date to speak again)	
10. The gift amount received was in the range that I requested	
11. I thanked the donor for his/her time and gift	
12. The donor felt good about my visit and his/her gift	
13. I enjoyed by visit	

**III. FOLLOW-UP** *1= Didn't do this 2= Waited too long 3= Completed right away*

1. I reported the results of the solicitation to _____ right away	
2. I mailed a personal thank you right away (no later than two days after the visit)	
3. I followed up immediately on any issues which arose during the solicitation	