## **Major Gift Process**

PROSPECT RESEARCH TARGET/PRIORITIES LIST PREPARE/SET VISITS PROSPECT/DONOR MEETING—Goals: Educate, Engage and ASK NOT READY FOR THE ASK READY FOR THE ASK OR AND YOU GET A "NO" OR "MAYBE" YOU ASK **Meeting Response Options** YES, BUT LATER GIFT YES -- NOW NO MAYBE **ACTIONS ACTIONS ACTIONS ACTIONS** ☐ Thank □Thank □ Thank ☐ Thank ☐ Ask to Inform\* ☐ Ask to Inform\* ☐ Ask to Inform\* ☐ Ask to Inform\* ☐ Ask for Referral ☐ Ask for Referral ☐ Ask for Referral ☐ Ask for Referral □ Do Thank You Letter ☐ Determine What Info ☐ Determine When Gift to ☐ Determine When Gift to Be Paid & How Much Be Paid & How Much and When to Follow-□ \*Add to Mailing, Up □ Do Thank You Letter Invite, etc. ☐ Do Thank You Letter ☐ Do Thank You Letter ☐ Add Invoice ☐ Add Invoice ☐ Confirm Follow-Up □ \*Add to Mailing, □ \*Add to Mailing, Invite, etc. Invite, etc. □ \*Add to Mailing, Invite, etc. ☐ Board Member Calls to ☐ Board Member Calls to ☐ Bring Back to Staff & Thank Thank Committee ☐ Periodic Check-In ☐ Periodic Check-In ☐ Follow-Up as Promised **Strategists** ☐ Personal Invite to ☐ Personal Invite to ☐ Set Next Appointment **Engagement Activities Engagement Activities Debbie Mason** ☐ Repeat Process

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