

# HOW TO SET UP AN INTRODUCTORY MEETING

Starting relationships with new prospects is central to a gift officer's work. The challenge, however, is most high net worth individuals lead busy lives. They run businesses, travel, have families, etc.

How are you going to get on their radar?

One email might not do it. To make sure you get their attention, plan out a series of emails and phone calls.

But that series has to start somewhere! After extensive testing, I believe an introductory email is the best first step. But beware of "intro overkill." Keep in mind that it needs to be concise and it needs to be focused on your prospect.

RELEVANT AND RECIPIENT-FOCUSED: PEOPLE LOVE TO TALK ABOUT THEIR WORK. IF YOUR PROSPECT DOESN'T HAVE A DAY JOB, YOU CAN REFERENCE OTHER LEADERSHIP ROLES THEY'RE PLAYING IN THE COMMUNITY. OFFERING TO HELP WITH CONNECTIONS IS ALSO OF VALUE TO BUSINESS AND COMMUNITY LEADERS.

RELEVANT AND LIKELY TO AROUSE CURIOSITY. DAN WILL WANT TO KNOW WHO FROM HIS ALMA MATER IS INVITING HIM TO LUNCH, AND WHY.

UNLESS YOU KNOW THE PERSON WELL, KEEP OPENING PLEASANTRIES BRIEF. CONSIDER MOVING ALL PLEASANTRIES TO THE END FOR EXTREMELY COLD CONTACTS. IN THIS EXAMPLE, DEBORAH DOESN'T KNOW DAN, BUT HE IS AN ALUMNUS OF THE COLLEGE. HE HAS AN EXISTING RELATIONSHIP WITH THE INSTITUTION, EVEN IF IT'S WEAK.

TO: Dan Desmond  
FROM: Deborah Ward  
SUBJECT: From Pine Hills College -- Lunch?

Dan,

Greetings from Pine Hills! I hope this note finds you doing well.

I'm writing because I'd like to treat you to lunch in the weeks ahead. With so many new developments underway at Pine Hills, we want to keep current with how alumni are feeling about the college. Your feedback is very valuable to us!

Plus, you're clearly doing some interesting work over at ACME Corp. I'd love to hear more about it and see what connections we might be able to make on campus.

Would next Wed 8/12 or Thurs 8/13 work? Perhaps we could meet at Mituc Umami there on Center Ave.

Hope to meet you soon!

Warm regards,

Deborah Ward  
Senior Director of Development  
Pine Hills College

THIS IS A FAIRLY GENERAL APPROACH AND FINE IF YOU DON'T HAVE MUCH TO GO ON. IF YOU HAVE A MORE SPECIFIC IDEA FOR HOW YOUR PROSPECT'S ADVICE/INPUT MIGHT BE RELEVANT, USE IT!

MAKE IT EASY: BE THE FIRST TO SUGGEST A FEW DATE/TIME OPTIONS. ALSO SUGGEST A MEETING PLACE CLOSE TO THEIR OFFICE THAT THEY'RE LIKELY FAMILIAR WITH. IF THEY CAN VISUALIZE THE MEETING, IT'S EASIER TO SAY "YES."