



## Worksheet: How to Create a Meaningful Meeting Experience

The key to a powerful and productive meeting experience with a donor is to create a meaningful interaction. This can be done face-to-face but can also be achieved through many other forms of interaction from phone and email to video chats.

This worksheet will help you walk through steps you can take to create a powerful and meaningful meeting experience with your donors in any format.

### Step 1: Identify Your Meeting Purpose

<i>What is my goal?</i>	
<i>What do I want to get out of the meeting?</i>	

## Step 2: Brainstorm Ways You Can Connect with the Donor (Based on the Donor's Preferences)

<i>What are my connection options? (i.e. Phone, Email, Video Chat)</i>	
<i>Which option will be best given my donor's preference?</i>	
<i>What do I need to do to prepare myself to use this method?</i>	
<i>What do I need to do to prepare my donor to use this method?</i>	

### Step 3: Identify the Steps & Timeline Needed to Create the Experience

Action Item	Deadline
<i>Ex. Contact donor to see if she has a webcam for a video chat</i>	