

# Ways to “Make the Ask”

Group solicitation, followed up by peer to peer solicitation are the most effective and efficient ways to campaign. It assures that the maximum amount of consistent information reaches all employees.

Experience shows that the best results are achieved when “the ask” is made during an already scheduled meeting. Also consider segmenting your group solicitation efforts by employee divisions (i.e., key management, hourly, etc.) This allows you to target your message.

Recruit enthusiastic, responsible people representing the key areas of your organization, ideally, one solicitor for every 20 employees. Give the solicitors the information and motivation needed to do the job right.



## Solicitor Best Practices

### **Know Your Facts!**

Study the Campaign materials and brochure. Learn as much about United Way of Forsyth County partner agencies and programs as you can.

### **See Your Prospects In Person!**

Personal contact is the way to solicit. If your prospect is not available, do not leave materials with a note. Return to see him or her later.

### **Show Enthusiasm and Confidence!**

Your attitude creates a strong impression and your enthusiasm is contagious.

### **Always Say Thank You!**

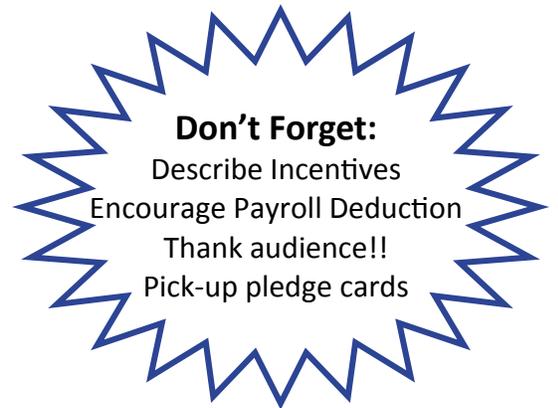
A little courtesy goes a long way.

# Group Solicitation:

## Sample 20 minute campaign meeting agenda

Send an invitation from the CEO to all employees stating the purpose of the meeting. Distribute pledge cards and brochures at the beginning of the meeting.

- 1 min.** Coordinator's opening remarks
- 4 min.** CEO or Management provides statement of support and encourages participation.
- 5 min.** United Way representative communicates United Way's community impact message.
- 5 min.** Agency speaker
- 5 min.** Coordinator: Make the 'ask.' Invite the audience to join you in making a difference in people's lives by giving to United Way.



## Incentives

Include some food - popcorn, pizza or doughnuts are always a hit. Get a few prizes donated or raffle extra vacation time, dress down days, company parking spaces, etc. Publicize prize drawings in the meeting's advance notice.

## Group Solicitation Checklist:

- Talk with your United Way representative.
- Meet with COE to review plans and establish a goal.
- Send CEO endorsement letters to employees.
- Establish group meeting schedules.
- Conduct group meetings, distribute and collect all pledge forms.
- Follow-up solicitations for employees not able to attend group meetings.
- Thank volunteers and donors.
- Turn in your completed Campaign Envelope , the United Way copy of the Pledge Form and all cash and checks promptly to the United Way office.

## Peer-to-Peer Solicitation:

Soliciting each employee on a personal, peer-to-peer basis is an effective approach for your organization's United Way Campaign.

### Peer-To-Peer Solicitation Checklist:

- Talk with your United Way representative.
- Meet with your COE to review goals and plans.
- Send CEO endorsement letters to employees.
- Recruit enthusiastic, responsible people representing key departments of your organization.
- Give the solicitors the information and motivation to do the job right, including pledge cards for all assigned employees.
- Solicit employees!
- Thank solicitors in a special meeting. Don't forget to always thank your donors.
- Forward payroll deduction forms to the Payroll Department.
- Turn in your completed Campaign Envelope , the United Way copy of the Pledge Form and all cash and checks promptly to the United Way office.

## NEW HIRES PROGRAM

The New Hires Program is an opportunity for new employees to contribute payroll deduction at the beginning of their employment. Educate newly-hired employees about United Way of Forsyth County during their employment orientation session. It is an excellent method for communicating to new employees your company's commitment to our community.

## RETIREES PROGRAM

The Retirees Program is an opportunity for your retired employees to continue to contribute to United Way of Forsyth County after their retirement. Ask one of your most active retirees to send a solicitation letter to his or her retired colleague (s).

