Steps to an Effective One-on-One Presentation

One-on-one presentations can be very effective in encouraging people to participate in the campaign. These presentations should be conversational, with no pressure. Peer-to-peer presentations work best, so ask steering committee members and/or team leaders to make presentations, as well. Make copies of this sheet, plus "Making the Ask," for team members to help them prepare for their one-on-one presentations.

1. Plan

- Make your own donation before asking others to give.
- Schedule 5 to 10-minute appointments.
- When scheduling meetings, explain the purpose of the meeting and how long you expect it to take.
- Schedule meetings in person or on the phone. Confirm by e-mail.
- Meet first with employees you know well.
- Promote the campaign before you meet with employees.

2. Organize

- Personalize the pledge form and don't forget to bring extra pens to the meeting.
- Bring the United Way partner agency guide and the suggested giving guide (see box).
- Prepare your presentation, but keep notes to a minimum. Do not read a statement to the employee. Refer to notes only to keep you on track; speak personally to the employee and use a lot of eye contact.
- Plan for no more than 2-3 minutes for your presentation. Use the remaining time to discuss concerns and answer questions.

3. Meet

- Review the purpose of the meeting.
- Explain the purpose of the employee campaign and the role it plays in supporting United Way
- Describe what United Way does and how it impacts the community (See ‘5 Key Messages’ and ‘Why Should I Give to United Way’ in the Communicating the Message section on this CD)
- Tell the story - describe your personal experiences observing the impact of United Way and its agencies (agency tours, volunteering, people you know who have been helped).
- Mention three or four community needs that you think are most relevant to the person you’re meeting with. The point you're making by explaining these needs is the necessity for continued support.
- Ask questions and listen for clues that, tell you about the interests, activities and motivators of the employee you are meeting with. Find ways to tie giving to things that motivate the employee.

Note: Do not utilize questions or wording that could imply judgment. For example, to probe for areas of interest in community service, ask which community needs are of most concern to the employee, not

whether he or she currently gives or volunteers to any charities. Remember that the decision to give is highly personal.

- Watch for signals that the employee is connecting with the message. Signals can include frequent nodding, smiling, becoming enthusiastic, interjecting personal stories, offering to help or providing suggestions for the campaign. Be flexible in your presentation so that you can move in a direction that the employee responds to whenever you see these signals.

- Ask for the pledge. Here are three ways:
  - "If you contributed last year, please consider increasing your pledge."
  - "If you haven't participated in a workplace campaign before, please consider doing so this year."
  - "Remember that payroll deduction makes giving convenient, and also allows you to spread your giving over the course of a year."

- For information on handling objections and tough questions, see "Making the Ask" in this kit.

4. Follow Up

- Thank the employee for his or her time.

- Encourage the employee to fill out the pledge card during the meeting.

- If the employee chooses not to fill out the pledge card during the meeting, but indicates a willingness to contribute, set up a time when you can pick up the pledge card, and confirm with an e-mail when you return to your desk.

Suggested Giving Guide

If you earn this:	***Consider a gift of this amount:***
Up to $19,999/yr	**one hour's pay per month**
$20,000 to $29,999	**1%**
$30,000 to $69,999	**1.25%**
$70,000 to $99,999	**1.5%**
$100,000 and up	**2% +**

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