

SAMPLE CALL SHEET

01/12/11 (date created)

ASK AMOUNT \$1,000**Zoe Markham**1402 Emerson Street, NW
Washington, DC 20011**Home phone:** (202) 543-1361**Fax:****Mobile phone:** (202) 744-0893**Email:****Work phone:** (202) 223-8885**Employer:** The Campaign Workshop**Title:****Notes:** Do not call Zoe until 2012 because of travel in December**Contribution History**

Date	Amount	Cycle	Period	Source
11/14/09	\$1,000.00	2010	Primary	dc lunch
10/01/08	\$1,000.00	2008	General	dc lunch
06/13/08	\$1,000.00	2008	Primary	women's lunch
03/26/08	\$1,000.00	2008	Primary	

Pledge History

Date	Amount	Period	Source	Type	Paid
10/31/09	\$1,000.00	Primary	dc lunchS		\$1,000.00
03/14/08	\$1,000.00	Primary	call time	H	\$1,000.00

Pitch

Zoe is a previous donor who needs to understand the challenge you face this year. When you spoke with her last year, you didn't know who your opponent would be.

Comments

Zoe used to work for EMILY's List; husband does immigration policy

Follow-up**Submitted By:** _____**Completed By:** _____

SAMPLE CALL TIME SCRIPT

Steps in a fundraising ask:

1. Establish rapport
2. Explain your strategy
3. Prove you can win with the right resources
4. Research and begin prospecting affiliated network
5. Get donor invested
6. ASK AND BE SPECIFIC
7. Zip it up and listen
8. Collect
9. Show appreciation
10. RESOLICIT

Sample call time ask:

Hi, Zoe, this is Belle Weather. How are you? It's been a long time since we've spoken. You've been such a great supporter but I only see you across the room at those big DC events. How are you? How was your trip last month?

Obviously, you have been aware of the work I've been doing in Congress. The new news in this race is that I now have an opponent and the opposition is really targeting this race. He has a clear record of not supporting basic women's rights....

We actually haven't done our baseline poll yet but did you see the recent numbers in the news? People who know me have a positive view of the work I've been doing in Washington.

The problem is that it's hard to reach people that don't know who I am. It's such an expensive TV market, I really have to find other ways to communicate with voters. So we're going to be running a much more extensive field operation this time. Of course, that takes more money up front, but I think it will be very effective. I've hired a former Obama state director as my manager.

You've been so helpful already this cycle, do you think you could contribute another \$1,000 this month?

SAMPLE CALL TIME TRACKING SHEET

Date	Time of Day (morning, afternoon, evening)	Hours Scheduled	Hours Completed	Connects Made	Messages Left	Hard Pledge	Soft Pledge	Declines	Total Raised
Weekly Total									
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