

ONLINE PERSONAL SOLICITATION GUIDE



Historically, we prefer to meet with families in person to ask for their participation, these unique times require us to adapt to the situation we face. Online solicitations provide an easy way to personally connect with parishioners while remaining apart. Although times are uncertain, your goal is to visit with families to secure gifts from those who are ready. Below you will find our 5 recommended steps for conducting successful online visits.

1. CHOOSE A PLATFORM

Google Hangouts, Zoom, Facebook Messenger, Skype, FaceTime (for Apple devices only) are all common platforms utilized by Pastors and Volunteers across the country. We encourage you to find the platform that works best for you and is easiest for you to operate – test these with your campaign director prior to the visit!

2. SCHEDULE A MEETING

Call each family to schedule a time to speak with them using one of these platforms. When the meeting has been scheduled, email the brochure and include a link to join the meeting, if one is needed.

3. CONDUCT THE VISIT

This visit should follow a similar format as those conducted in person. Begin with a prayer, walk through the campaign brochure and then make the request. Answer any questions they may have and then discuss next steps. Create a plan to follow-up with the family you have just visited with.

4. FOLLOW-UP

After you have answered their questions, send a follow-up email thanking them for their time and include the copy of the request letter, a pledge form, and a link for online giving.

5. SECURE GIFT

Some families may be experiencing financial hardships and may not be able to give, others may be ready to pledge! For those seeking more time, thank them for their prayers and follow-up later on. For those eager to pledge, follow-up a week after the visit to walk them through the pledge card.

COMMUNICATION PRINCIPLES

- Begin every conversation in prayer informed by scripture
- Begin any conversation from a place of empathy. We are facing this crisis together and we are all asking similar questions and sharing similar fears
- Approach the same conversation with a similar spirit of sensitivity. We don't know for sure what the Individual may be facing in their own family situation.