



**FOR YOUTH DEVELOPMENT®  
FOR HEALTHY LIVING  
FOR SOCIAL RESPONSIBILITY**

## TEN STEP PLAN FOR A SUCCESSFUL ASK

- 1. Introduce yourself and the purpose of your visit.**  
State that you are a volunteer doing this out of your personal belief in the Y and your strong conviction about its importance to the community. Share your feelings and tell your story of why the Y is important to you.
- 2. Ask questions that establish the prospect's understanding of the Y.**  
Examples: What has been your experience with the Y? Do you and your children or friends use the facility and/or enjoy the programs? What do you think are the important roles that the YMCA serves in our community?
- 3. Share your thoughts about the Y and its importance in the community.**  
Make it a two-way conversation by sharing your story, then pause, so that the prospect can contribute too. Example: tell why you think the Y is important and share what your involvement has been.
- 4. State this year's case for giving.**  
Become familiar with the Y's current case statement and use it to explain how the community will be better because of this valuable community asset.
- 5. Ask about the prospect's area of interest.**  
What aspect of the Y do they feel most strongly about and why?
- 6. Ask for the gift – and ask for a specific amount.**  
Use information from the prospect's area of interest to ask for a specific amount and then wait for them to respond. By asking for a specific amount you offer a service and show respect for the prospective donor. This person can then choose whether that dollar amount is right for them.
- 7. Take out the pledge card ONLY after they have agreed to contribute.**
- 8. Ask about matching gifts.**  
Many companies match gifts to the Y. Check with the Y office if they questions about this process.
- 9. Fill out the pledge card with them and get their signature.**  
Fill out this information as thoroughly as possible so that the Y office has current and accurate information. Feel free to write additional information on the pledge card as needed.
- 10. Thank the donor for their generosity.**

## You've done it!