

Note: This is a real call memo that I prepared **in advance of a call (self fulfilling prophecy)**. I've changed around a bunch of names and situations in order to be able to share.

Call Memo – ORG + DATE

Nick Fellers w/ George

- George goes way back with ORG. He's been funding off and on for 20 years and clearly LOVES the organization.
- We spent 5-10 minutes talking all about the VISION of the organization. He got very engaged as we talked about the possibilities with this current leadership and vision – where the program could be in 5 or 10 years.
- He got the PROJECT right away and wanted to turn our conversation toward figuring out how to make it a big success.
- Stayed focused on the idea that it was going to take 3-4 founding members at big funding levels (presentation tool indicated \$500K+). Stayed focused on talking about him helping us to FOUND this program.
- Asked, “Will you be one of our FOUNDERS?” He said YES.
- He gets the importance of early leadership. We talked about what an early commitment would mean (confidence in project, momentum, establish credibility, etc).
- *“I've been involved in many campaigns and organizations, this is the most exciting program I've ever seen.”*
- He took ownership of PROJECT by the end of the visit. Started to talk about ways to lead the funding plan.
- **The visit was a home run in every respect.**