

# Introductory Email Template

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**Instructions:** Up to 90 days before filming, use this template to send an email to fundraisers chosen to participate in the filming session. This email can be sent once a date has been set for the session, or the message can be followed by a calendar invitation once rooms have been reserved. Information in brackets should be customized to fit your institution.

**Attachment:** Simulation Description and Agenda (page 11) to this email.

Dear Colleagues,

You have been selected to participate in a simulation-based coaching session. This is a four to five hour training session spread over the course of two days in the same week. The sessions will enable you to practice common solicitation scenarios in a low-stakes environment. You will also receive and share feedback with other MGOs.

### **Day One – 3.5 hours**

You will have the chance to pick one of seven different fundraising solicitation scenarios prior to day one. During the session, you will do a five- to seven-minute role play with an experienced fundraiser, soliciting them for the opportunity you selected and prepared. The role play will be filmed, and the other participants will offer positive feedback. This will allow you to learn what techniques you used successfully. In turn, you will be able to offer positive feedback to role-playing colleagues.

After day one, you will review the video of your role-play in order to see the solicitation from the prospect's point of view.

### **Day Two – 1.5 hours**

After reviewing your own video, you will have the opportunity to discuss what you saw and reflect on the experience.

This will be an opportunity to see your colleagues' solicitation styles, gain new techniques, reflect and give feedback to other fundraisers, and interact with experienced coaches. You may gain ideas for strategies you've never seen before. While filming may sound frightening, you will be able to see exactly what you do well and receive positive feedback based on situations your colleagues would not otherwise witness.

A detailed simulation description and agenda are attached. An Outlook invitation will follow shortly. Classes are tightly constructed for optimal size. Please let me know immediately if you have a major conflict or any questions about the class. I will send more information as the date approaches.

Sincerely,

[*Your Name*]

Source: EAB interviews and analysis