



## **Thank you for your inquiry about our programs:**

- Bequest Survey
- Major Donor qualification

Within two business days of receiving your inquiry, we will contact you to schedule an exploratory conversation. To help make this discussion mutually efficient and beneficial, we ask you to be prepared to answer the following questions.

- **What are your primary objectives for a planned giving calling campaign?**
- **How many prospects in your current database could be suitable for a Covenant Calls campaign?**
- **Would the Covenant Calls campaign be tied into a current capital campaign?**
- **If yes:**
  - How far into the campaign are you?
  - What is the total campaign goal and deadline?
  - What percentage of the campaign goal is planned gift driven?
  - How are bequests counted toward your goal?
- **Have you engaged in a previous calling campaign?**
- **If yes:**
  - What database criteria did you use to determine which prospects to contact?
  - What was the total number of prospects on the call list?
  - Number of calls completed?
  - Number of new bequest/estate expectancies identified?
  - Number of prospects who indicated an interest in more information?
  - Number of leads for life income gifts?
  - Number of closed gifts resulting from call campaign leads?
  - What did you like most about your last calling campaign?
  - Which aspects of your last calling campaign could have been improved?