

Prospect Contact and Relationship Development Log

Completed By: _____ Title: _____

Prospect Name: _____ Phone: _____

Purpose of Contact: ___ Introduction ___ Cultivation ___ Request/Solicitation

Contact Mode:

___ Telephone

___ Chance encounter

___ E-mail

___ Planned encounter

___ Letter

___ Other: _____

___ In person

Donor's Capacity: _____ Donor's Affinity: _____

Lead Staff on Prospect: _____ Team: _____

What was discussed during the meeting?

What was the prospect's reaction and disposition?

What is your next step? When will this step be taken?

What is the prospect's next step? When will this step be taken?

Were any commitments made, including on the behalf of somebody else?

Any additional details:
