

# APPOINTMENT SETTING SCRIPT

## For Established Clubs

2020

### INTRODUCTION

Hi! How are you today?

Good!

Ok, good!

My name is \_\_\_\_\_, and I'm calling on behalf of \_\_\_\_\_ Kiwanis Club.

The Kiwanis club of \_\_\_\_\_ wants to increase our service to the \_\_\_\_\_ community to help children and families and I would like to speak to someone in your organization about it (it would be preferable if you have already researched the organization's website and can ask for a particular person). (If not) Would that be the (owner, manager, community relations person, etc?)

Are you that person?

No, but I'll get one. I am the manager/ owner.

Yes / somewhat

You've heard of Kiwanis, right?

Ok, then you may know Kiwanis International has been around for over 100 years and is a volunteer based organization. The Kiwanis Club of \_\_\_\_\_ has been in this community for \_\_\_\_\_ years. Our members are community leaders such as yourself, who come together to help less fortunate families and children in \_\_\_\_\_. We are involved in many projects. Our club is most known for \_\_\_\_\_.

No.

Ok, well Kiwanis International has been around for over 100 years and is a volunteer based organization. The volunteers are community leaders such as yourself, who come together to help less fortunate families and children in your town. They are involved in many projects. You may be familiar with our club's \_\_\_\_\_ project.

\* \* \* \* \*

### **APPOINTMENT CLOSING**

A couple of our members would like to meet with you to talk about service in the community. Our visit should only take about 15 to 20 minutes, as your schedule permits. Our goal is to determine the needs of the community as you see them and how our club could help with those needs. We understand that social distancing is our new way of life. So, if you would prefer, we can meet with you online. I have 10 am and 2 pm open on \_\_\_\_\_ day, what time works for you?

Why?

We want to get your input on the community needs. Our members are leaders who want to keep our community strong and safe. Doesn't take long. And we are always looking for fresh ideas. So how's 2 on \_\_\_\_\_ day sound?

Okay! I have you down for \_\_\_\_\_ at \_\_\_\_\_. Would you prefer a face to face meeting or an online one? I will be glad to send you a confirmation email with the time and date. This will also provide you with my contact information (and the online meeting info— if this option is chosen) so that if things change and you need to reschedule, you can reach out to me. Thank you again! And have a great day! You're awesome and we look forward to meeting you!

\* \* \* \* \*

# Tips for Calling

1. Desired contact not there?

Thanks. Do you know when a better time to call would be?

Yes, call back at \_\_\_\_\_  
In the meantime, I would like to send \_\_\_\_\_ an email to let them know the purpose of my call. Would that be ok? What's their email address?

[abce@gmail.com](mailto:abce@gmail.com)

2. Desired contact not there?

Thanks, is their assistant there or another person that I could speak with?

3. Not interested in setting appointment due to time?

I understand how valuable your time is. Our goal is to ensure that our club will be able to help with serving the needs of the community and in light of our country's recent health pandemic, we want to do all that we can. In your position, you often hear about community needs from leaders in your professional associations that can really help with this effort. Do you have just a few minutes to chat? It won't take long.

/

4. Not interested in setting appointment due to not wanting to join the club?

Of course as we look to expand our club's service, we will be looking for community leaders like yourself to help with that effort. However, right now we really just want to make sure that we understand the needs of the community first. Could you help us with that? Again, it won't take long.

5. Not interested in setting appointment due to business not interested in serving the community?

Well, I really appreciate your time today. I understand that we are all pressed for time right now. But I noticed that your organization participates in \_\_\_\_\_ service project (Don't say this if you haven't researched the organization). Could we schedule a time to talk about that? Our club may be able to help with that effort.

6. Still not interested in setting appointment

Thank you again for your time today. Do you mind referring me to an organization or other community members who you think may be interested in providing us with some feedback on the needs of the community?

/

# APPOINTMENT SETTING SCRIPT

## For New Clubs

2020

### INTRODUCTION

Hi! How are you today?

Good!

Ok, good!

My name is \_\_\_\_\_, and I'm calling on behalf of \_\_\_\_\_ Kiwanis Club.

We are helping begin a new Kiwanis club in \_\_\_\_\_ community to help children and families and I would like to speak to someone in your organization about it. (it would be preferable if you have already researched the organization's website and can ask for a particular person). (If not) Would that be the (owner, manager, community relations person, etc?)

Are you that person?

No, but I'll get one. I am the manager/owner.

Yes / somewhat

You've heard of Kiwanis, right?

Ok, then you may know Kiwanis International has been around for over 100 years and is a volunteer based organization. We have \_\_\_\_\_ clubs in the neighboring communities but, the \_\_\_\_\_ community doesn't currently have a club. Kiwanis volunteers are community leaders such as yourself, who come together to help less fortunate families and children. We are involved in many projects such

as after school programs, helping single parents, whatever the community needs may be.

No.

Ok, well Kiwanis International has been around for over 100 years and is a volunteer based organization. The volunteers are community leaders such as yourself, who come together to help less fortunate families and children in your town. They are involved in many projects such as after school programs, assisting single parents, whatever the community needs.

\* \* \* \* \*

### **APPOINTMENT CLOSING**

A couple of Kiwanis volunteers would like to meet with you to talk about service in the community. Our visit should only take about 15 to 20 minutes, as your schedule permits. Our goal is to determine the needs of the community as you see them and how a new club could help with those needs. We understand that social distancing is our new way of life. So, if you would prefer, we can meet with you online. I have 10 am and 2 pm open on \_\_\_\_\_day, what time works for you?

Why?

We want to get your input on the community needs. Kiwanis volunteers are leaders who want to keep our community strong and safe. Doesn't take long. And we are always looking for fresh ideas. So how's 2 on \_\_\_\_\_day sound?

Yes

Okay! I have you down for \_\_\_\_\_ at \_\_\_\_\_. Would you prefer a face to face meeting or an online one? I will be glad to send you a confirmation email with the time and date. This will also

provide you with my contact information (and the online meeting info— if this option is chosen) so that if things change and you need to reschedule, you can reach out to me. Thank you again! And have a great day! You're awesome and we look forward to meeting you!

\* \* \* \* \*

## Tips for Calling

1. Desired contact not there?

Thanks. Do you know when a better time to call would be?

Yes, call back at \_\_\_\_\_ In the meantime, I would like to send \_\_\_\_\_ an email to let them know the purpose of my call. Would that be ok? What's their email address?

[abce@gmail.com](mailto:abce@gmail.com)

2. Desired contact not there?

Thanks, is their assistant there or another person that I could speak with?

3. Not interested in setting appointment due to time?

I understand how valuable your time is. Our goal is to ensure that this new club will be able to help with serving the needs of the community and in light of our country's recent health pandemic, we want this new club to do all that they can. In your position, you often hear about community needs from leaders in your professional associations that can really help with this effort. Do you have just a few minutes to chat? It won't take long.

4. Not interested in setting appointment due to not wanting to join the club?

Of course as we look to open this new Kiwanis club, we will be looking for community leaders like yourself to help with that effort. However, right now we really just want to make sure that we understand the needs of the community first. Could you help us with that? Again, it won't take long.

5. Not interested in setting appointment due to business not interested in serving the community?

Well, I really appreciate your time today. I understand that we are all pressed for time right now. But I noticed that your organization participates in \_\_\_\_\_ service project (Don't say this if you haven't researched the organization's website). Could we schedule a time to talk about that? This new club may be able to help with that effort.

6. Still not interested in setting appointment

Thank you again for your time today. Do you mind referring me to an organization or other community members who you think may be interested in providing us with some feedback on the needs of the community?

/

# Appointment Setting Training

## Scenario 1

### **Instructions:**

Pick 1 person to be the Potential New Member (PNM).

Person 2 is the Kiwanian setting the appointment with the PNM

Potential New Member	<ul style="list-style-type: none"><li>• Secondary school principal</li><li>• Person is a seasoned educator and has just completed her/his first year as the principal</li></ul>
Referred by	No one

**Instructions for the Potential New Member:** Get into the mindset that you have recently transitioned from teaching into administration and that your school has been closed due to COVID-19 for the past 2 months. The high school has a healthy Key Club, but no sponsoring Kiwanis Club and to your knowledge the Key club hasn't met because school is closed. You have no idea what Kiwanis is. You have very little engagement with Key Club other than knowing it is a recognized student organization and raises money to help in the community.

**Instructions for the Kiwanians:** You are calling to set the appointment and it happens to be during COVID-19 school hiatus. The principal, the Potential New Member is very busy with learning the new position and trying to meet students & staff needs while the school is closed. But you know there is an adoptable Key Club at this school and the students have additional needs due to the school's closure that would greatly benefit from having a sponsoring Kiwanis Club.

# Appointment Setting Training

## Scenario 2

### **Instructions:**

Pick 1 person to be the Potential New Member (PNM).

Person 2 is the Kiwanian setting the appointment with the PNM

Potential New Member	<ul style="list-style-type: none"><li>• Director of Boys and Girls Club</li><li>• Approximately 35 years old</li><li>• Person is a veteran of the Boys and Girls Club organization having worked there since graduating from university</li></ul>
Referred by	High School Principal

**Instructions for the Potential New Member:** Get into the mindset that you have recently transitioned into the Director role. You have worked for the Boys and Girls Club since you graduated from the local university. The Boys and Girls Club operates on a lean budget and serves approximately 200 children each day but currently the club isn't open due to COVID-19. There is a need for more staff and some updates are needed to both the building as well as the materials the children use. The Club has received several grants from civic organizations to fund special projects, most recently a computer lab (computers and furniture). You have heard of Kiwanis based on conversations you've had at regional Boys and Girls Club meetings; however, you think this is a civic organization for older, retired, and wealthy people that won't be interested in volunteering at your club site. And you are not sure about bringing virus vulnerable individuals to the your site even though they may want to help.

**Instructions for the Kiwanians:** You are calling to set appointment with the director who is new to this position. The High School Principal referred you to this individual based on the Principal's personal observations that the Boys and Girls Club is a safe haven for many children in the community. The Principal speaks highly of both the Club and the new Director. The High School Principal has met with Kiwanis volunteers and has agreed to join the (new or established) Kiwanis Club and has completed a membership application and submitted payment.

# Appointment Setting Training

## Scenario 3

### Instructions:

Pick 1 person to be the Potential New Member (PNM).

Person 2 is the Kiwanian setting the appointment with the PNM

Potential New Member	<ul style="list-style-type: none"><li>• Branch manager, Wells Fargo Bank</li><li>• Approximately 50 years old</li><li>• Parent to two teenage children</li></ul>
Referred by	Chamber of Commerce President

**Instructions for the Potential New Member:** Get into the mindset that you are the branch manager at one of largest banks in the community. Your branch has a healthy reputation in the community for upholding the Wells Fargo’s purpose, vision, and goals. But you are currently working long hours processing SBA Loans for businesses affected by COVID-19. You are the parent of two teenage children who are enrolled at the local high school but your children are at home due to the school closure. Both of your children were very involved in school activities, both academic and athletic while the school was open. One child is involved with the school band, and the other is a member of the Key Club. You have heard of Kiwanis but have limited knowledge of the organization. You have been a member of Rotary International for many years; your membership is paid for by your employer and you rarely attend meetings because you are too busy and they meet at lunch time (you can’t always get away from work).

**Instructions for the Kiwanians:** You are calling to set an appointment with an overextended branch local branch manager of the Wells Fargo branch. The manager wants to remain involved in the community but has teenagers in school, is a single parent and working long hours processing COVID-19 SBA loans. The chamber president told you that the manager would be an excellent person to contact but they are very busy with kids and work. This particular branch is located within 1 mile of the local high school that has a healthy Key Club. You are aware of the Wells Fargo’s purpose, vision, and goals – one of which “community and social impact.”