PAPPA after the conversation

Fill in the map in the debrief afterward, then let Approach set the next move. Write down a phrase you want to remember on each line.

Passion

What they care about, in the words they used. What lights them up, what they return to unprompted. The moment their voice changed, a story they did not have to tell

Assets

Capacity signals, giving history, and non-financial assets like credibility, board experience, and influence. What decisions they control, whose opinion they can change, what they have given before and what prompted it. When there is nothing on record, say the blank is a blank

People

Their network. Spouse, family, colleagues, board ties, the friends who function as their scouts, and anyone they named

Property

What they own. Real estate and holdings, only if it came up. Mark it unresearched when unresearched. Never leave it out and never guess

Approach

Where to find them and how they prefer to be reached. A call or a note, a lunch or a letter, an intimate gathering or a full house. The most actionable slot, it is how you design the next move. Never the address or number itself

Open the PAPPA guide

Use the Supercharged Contact Report

Supercharged Contact Report

Donor visit worksheet

Adapted for a one-to-one visit from Anne Murphy's original fillable report. Use initials or a nickname. Leave out addresses and phone numbers. Record what the donor said in the space beside each field.

Visit date and participants

Purpose of this meeting

People	People — family, colleagues, board ties, and others mentioned.
Purpose	Passion — the donor's priorities and interests, in the words they used.
Advisors	People — legal and financial advisors involved in decisions.
Assets	Assets — stated giving history, resources, experience, and influence.
Communication Preferences	Approach — where to find them and how they prefer to be reached.
Real estate and holdings mentioned in notes	Property — what they own. Use "Unresearched" when it did not come up.

Open questions or concerns

What we agreed to do, who owns it and by when

Open the original fillable report
Download the Template and Guide
Read the full Supercharged Contact Report
Use the follow-up action log

Donor meeting follow-up

Before you leave, agree on the next step, who owns it and when it will happen. Ask “How do you like to be reminded?”

Send the recap within 24 hours

Use the donor’s own words for what mattered to them. Include only the commitments you made together. If you didn’t settle on a date or a way to get in touch, ask what works for them.

Subject [Resource or next step] from our conversation

Hi [first name],

Thank you for [specific thing]. I especially appreciated hearing [what they told you, in their own words].

Here’s the [resource] you asked for. [Link or attachment and a sentence about the question it answers.]

I’ll [your agreed action] by [date]. You mentioned you would [their agreed action] by [date].

I’ll [call, email or write] on [agreed date] about [specific next step]. Did I miss anything you want me to include?

Warmly,
[Your name]

If the next step is still open

“Could you indicate when/how you'd prefer me to follow up?” Listen for a channel, timing and any decision the donor wants to make first. Use what they tell you to set the reminder.

Use the follow-up action log

Follow-up action log

Block time on your own calendar for follow-up. If you met with a colleague, debrief together and agree on who will do each piece.

Example of an agreed follow-up

A donor asks for the scholarship criteria and invites a check-in after a family conversation. They prefer email and agree to one reminder.

Action	Owner	When	Channel / result
Recap the visit and confirm the plan.	Gift officer	Within 24 hours	Email the donor.
Verify the criteria and send the one-page summary.	Program lead, then gift officer	By Thursday	Send the summary by email.
Ask what came up in the family conversation.	Gift officer	The following Friday	Email. If plans changed, agree on a new date.

Your next steps

Donor initials or nickname _____ Visit date _____

Action	Owner	When	Channel / result

Who else needs an update, and from whom?

If the donor asks for more time, record when they want to reconnect. If they ask you to pause, close the reminder.

Return to the donor questions