

PG Calc | Your Partner In Planned Giving Success

Effectively Promoting Your Planned Giving Program




Date: November 18, 2021
 Time: 1:00 – 2:30 Eastern Time

Presenters: Andrew Palmer
 Director of Marketing Services
 PG Calc

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 Director of Marketing
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Introduction

*"Master the topic, the message,
and the delivery."*

— Steve Jobs



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Agenda

We'll Discuss:

- Marketing vs. Planned Giving Marketing
- Strategy
- Messaging
- Tactics
- Impact of the Pandemic
- Testing



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Introduction

Marketing a planned giving program is unlike other forms of marketing:

- Very specialized
- Unlike B2C and B2B
- It's about:
 - Building relationships
 - Understanding donors
 - Educating donors



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Strategy

Marketing Strategy

Roadmap showing:

- Where you've been
- Acknowledgement of where you are
- Declaration of where you want to go
 - Tied to goals and objectives
 - Need for consensus



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Strategy

Assessment of Your Market Position

- Who are your key audiences?
- What's the strength of your brand?
- Who is your competition?

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Strategy

Review Your Current Marketing

- Which efforts have been successful?
- What are your metrics?
- How does this plan address specific goals?

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Strategy

Where You're Going:

- Account for each of your goals/objectives
- Articulate the tactics you'll use
- Detail how tactics work for audience segments
- What's the big picture you're creating?
- Remember to measure!
- Are we done yet?


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A Long-Term Strategy

Identify what you want to accomplish.
 It could be as simple as acquiring more bequests.
 Planned giving marketing is not transactional.
 It takes time...




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One Size Does Not Fit All

A marketing strategy that works for one organization will not work for all. It must be tailored to your charity and its mission.



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Planned Giving Success

Follow Your Plan

Executing it will help ensure that you're using your resources most effectively and will align your activities and goals, providing you the best chance for success.




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Factors to Consider

- How much can you afford to spend each fiscal year? [Budget]
- Your target donors
- Marketing schedule
- Be consistent



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Messaging

Developing a Messaging Platform:

Value Proposition

- Meaningful
- Newsworthy
- Differentiated



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Messaging

Developing a Messaging Platform:

In Non-Profits

- Sharing a vision
- Engaging constituents
- Demonstrating outcomes
- Making it personal

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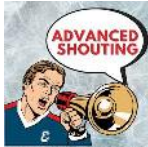
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Messaging

What Works:

- Repetition
- Good listening: create opportunities for response
- Articulate and reiterate your mission, and show how supporters empower it
- Build a dialog



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Messaging

Branding and Imagery + Education and Awareness = Credibility

Donor stories and testimonials are key

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Keep the Messaging Simple

- Benefits to the donor
- Self-satisfaction of giving
- Impact the gift

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Messaging

Stay away from formal and technical terms:

“A gift from your will”

vs.

“Bequest”


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A Survey Can Help with Messaging

- We care about you.
- This is your organization.
- Our donors are our greatest assets. (data collection, leads, intentions, etc.)

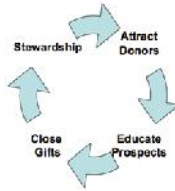


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Tactics




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Efforts Already in Place

- Inserts in thank you letters
- Checkboxes on reply envelopes
- Annual report
- Newsletter
- Facebook page
- Internal telephone callers
- The Board



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Tactics: Email

Email:

- More important than ever in the pandemic
- They will not read it all, so repetition is ok
- Focus on single messages and a single call-to-action



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Tactics: Email

Email Benchmarks:

Industry	Open Rate	Click Rate	Bounce Rate	Unsubscribes
All Industries	20.9%	7.8%	0.6%	0.5%
Education	25%	7.5%	0.5%	0.4%
Healthcare	21%	8.9%	0.6%	0.4%
Non-Profits	20.4%	2.7%	1.1%	0.2%

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Tactics: Email

Apple: Ruining Everything for Everyone (Or At Least For Marketers)

- iOS 15
- All emails automatically count as "opens"
- Inflating your open rate by 10%
- Up to 46% of all devices




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Email – in Addition To, Not in Lieu Of

- Quickest and most cost-effective way of conveying your bequest giving message
- Not always the most effective
- Email should be well-written, personal, and a benefit to your donors
- Builds relationships faster



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Be Careful

Are you sending too many emails?
Unsubscribes are forever.

Or do they never see the light of day?



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Most Importantly

Is it a good read?
Is it a benefit to your donors and relevant to their expectations?

If not, don't send!



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E-newsletters Work Well

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And So Do Single Issue Email Blasts

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Tactics: Direct Mail

Direct Mail Still Works:

- 56% of Americans find mail a "real pleasure"
- 73% prefer being contacted by mail
- 58% of mail is marketing
- 51% find postcards useful
- 90% peak open rate for mail
- 17 days: average time mail is kept
- 5x-9x greater response rates than any other channel

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Tactics: Direct Mail

Direct Mail Is a Tangible Reminder to Act:

- 75% of people recall a brand from mail (vs. only 44% after seeing a digital ad)
- 64% of marketers say mail has the highest response rate
- 40% increase in online donations from mail



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Tactics: Direct Mail

Good Direct Mail:

- Has a clear call-to-action
- Includes a reply mechanism
- Has moving stories
- Is personal and expressive
- Reiterates your core messaging

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Simple and Custom to Your Mission



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Constant Cultivation Is Key

- Your older donors will respond on an emotional level
- Younger donors will respond because this is something different
- Must be tailored to your mission




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Newsletter

Summit Trust

Ready to Give?
Here's Your Checklist

New Year, New Opportunity

Essential Questions: A Legacy Made Simple

Residues

The Top 10 Reasons


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Self-Mailers

Time is running out – 2020 is the perfect time to give cash!



As the calendar year comes to a close, take advantage of new tax incentives.

What's New:

- Charitable contributions can be deducted from AGI up to 30% of AGI.
- Cash contributions can be deducted from AGI up to \$300 per individual.

How might this benefit you?

For example, if you have a taxable income of \$100,000 and you contribute \$10,000 to a charity, your taxable income will be reduced to \$90,000. This means you will pay less in taxes and more will go to the charity.

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Websites

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Marketing Collateral

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Tactics: Social Media

Social Media – the Next Big Thing (Since the Last Big Thing)

- Email is more likely to drive sales than social media marketing
- 60% made a purchase from email vs. 12.5% buying on social
- 67% find mail more personal than the internet

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Tactics: Social Media

Social Media Does

- Connect people
- Leverage personal relationships/networks
- Influence others
- Effectively share personal stories
- Show impact (especially with video)
- Help you meet donors where they are
- Bolster your other marketing


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Where Are Your Donors?

- Facebook
- Twitter
- LinkedIn
- Instagram



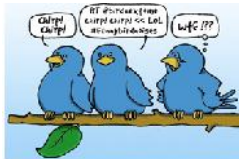
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You Should Have Been There!

Social Mentions: It's a natural fit for announcing, live reporting, and post-event postings.



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Effect of Covid

The Pandemic Changed How We Communicate

- Email became more important
- Boundaries between work and home blurred
- People are craving connection
- Customization is key
- Donors are no different



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Keep on Swimming!

- Messaging is now a bit more complicated
- **BUT KEEP MARKETING**
- Your good communication can help make sure that their "new normal" includes consistently showing up for those in need
- Focus on being smarter, and how you, and your organization, are here to help them




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Talk About It, and Keep Talking...

- In healthcare, show donors what your org is dealing with, has achieved, or will encounter
- While COVID brought so many things to a halt, cancer, hunger, homelessness, or whatever problem you're working to solve hasn't stopped
- Keep connecting online! Zoom!



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Testing

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We Learn When We Fail

- ***There is no failure. Only feedback.***
- **Test as much as you can**

No matter how well your marketing is performing, it can always do better.

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Everyone Can Do This

Subject Lines

You **MUST** convince your donors to open.

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Ideas...

- **Ask Questions:** Can I really get paid for giving?
- **Create a list of three:** Stocks, Bonds, and Mutual Funds
- **Use pop culture:** *Always Look on The Bright Side of Life*
- **Alliteration:** How to happily help the homeless
- **Keep it conversational:** What will your legacy be?

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More Ideas...

- **Create urgency:** Only 30 days left to give tax-free in 2021
- **Create uniqueness:** Can I pay you for life?
- **Write benefit-oriented copy:** Tax-wise giving opportunities
- **Be ultra-specific:** Get \$1,450 every year for life
- **Keep it clear and concise:** Why you need a will
- **Use humor:** The perfect going-away gift

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Testing


A: **"Planning for the unplanned"** - a variation on the estate planning article.

Open rate of 37.5%.

B: **"Giving made easy"** - the title of an article about the IRA Charitable Rollover.

Open rate of 31.4%

Reaffirming the hypotheses that "giving," although specific to the mailing, may not give the highest open rates.




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In Conclusion

- Be persistent and consistent in your communication
- Be sensitive to changes in a donor's life circumstances
- Just don't stop marketing
- Be proactive
- Patience is a virtue






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Questions?

- To ask a question:
 - ✓ Click  to the left of the slide.


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Still Have a Question?

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