

BatchCalcs

Personalization: A Key Component of Direct Mail Success



PG Calc's *BatchCalcs* service gives you a fast, easy, and affordable way to create more persuasive planned giving mailings, especially for gift annuities. How? By adding personalized calculations for each recipient.

BatchCalcs makes it easy for you to customize each message in your postal or electronic mailing with calculated values based on the age(s) of the recipient(s). Just send us an Excel file of their birth dates or ages. If your file includes target gift amounts, we can use them too.

For example, using *BatchCalcs* you can include personalized values such as the annuity rate, specific annuity amount, charitable deduction, and tax-free portion each recipient can expect based on his or her age and target gift amount. You can even include a **Summary of Benefits** chart that looks like it came right out of *Planned Giving Manager*.

The *BatchCalcs* values you include in your mailing, and how you format them, are entirely up to you.

What could be more compelling than to spell out the gift benefits specific to each individual on your target list?

Customized letters to your prospects can include:

- The prospect's age
- Annuity rate
- Specific annuity amount
- Charitable deduction
- Annual income
- Tax-free portion
- Years of partially tax-free payments

To learn more about our *BatchCalcs* service or other ways that PG Calc can help you market planned gifts more effectively, call 888-497-4970, email info@pgcalc.com, or visit www.pgcalc.com/marketing.

"BatchCalcs enables us to reach out more often to existing donors and prospects with personalized information. The result? A very cost effective solution for personalizing direct mail and better return on our direct mail investment. Another great example of PG Calc meeting their clients' needs."

Sue Ramsey
Director of Gift Planning
Boston College



Direct Mail Fundraising

Good Direct Mail Ideas Made Even Better

- Good Idea: In autumn, send a mailing to several hundred existing gift annuity donors to encourage them to fund another gift annuity.
- **Better idea:** Use BatchCalcs to include in each letter the specific charitable deduction and annuity rate each donor would get if he or she made a \$10,000 gift before the end of the year. Enclose with each letter a Summary of Benefits chart that provides annuity taxation details.
- Good idea: Identify a group of consistent annual donors to your organization who are 55 to 64 years old and provide details about deferred gift annuities.
- **Better idea:** Use BatchCalcs to include the charitable deduction and annuity each donor would receive if he or she were to fund a deferred gift annuity today and defer payments until age 65.
- Good idea: Send a mailing to a list of several hundred charitable remainder trust prospects that were identified by a screening process.
- **Better idea:** Use BatchCalcs to include the specific charitable deduction a donor receive get if the donor funded a 5% charitable remainder unitrust with a target amount before the end of the year.
- Good idea: Send a gift annuity mailing to the 50th reunion class in the fall before they return to campus.
- **Better idea:** Use BatchCalcs to show each class member the deduction and annuity amount he or she can expect if he or she funds a gift annuity with the target gift amount assigned during 50th reunion ratings meetings.

Critical Success Factors

Direct mail fundraising, electronic and post, is widely used by nonprofit organizations to acquire new donors and re-solicit existing ones. To be successful, direct mail solicitation programs require an understanding of both the fundamentals of direct marketing and the discipline of fundraising.

Critical success factors for a direct mail campaign include:

- **Choose your mailing list wisely.** The most critical factors in a direct mail campaign are an accurate mailing list and the relevancy to recipients.
- **Grow your mailing list organically.** Statistics show that organically grown lists consistently outperform purchased lists.
- **Appeal to the prospect's emotions.** Describe the mission of your organization in a compelling manner and demonstrate how a gift from the prospect will help advance that mission.
- **Include an opt-out option (and honor opt-outs).** Offering information on how to opt out of future fundraising mailings is considered a "best practice."
- **Be sensitive to the environment.** Use recycled paper whenever possible. Environmental organizations should be even more sensitive to the impression that direct postal mail will make on its donors and prospects.
- **Personalize.** We're all more likely to open mail addressed to our name rather than "Current Resident." This is bare-bones personalization. Particularly in planned giving, you can achieve a much deeper level of personalization by using PG Calc's *BatchCalcs* service.