



## **Planned Giving Marketing: What Works**

PG CALC WEBINAR

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## INTRODUCTION

*“The smart ones ask when they don’t know. And, sometimes, when they do.”*

— Malcolm Forbes

In the Fall of 2021 TikTok was named the fastest growing social media platform of all time, making the shortlist as one of the most downloaded apps globally. It’s viral nature allows for great exposure to teenagers, millennials, and boomers alike. Many nonprofits are using TikTok to grow their reach, connect with younger donors, and collect donations directly from the platform. So, should you add it to your planned giving marketing mix?

Our *Marketing Services* group advises clients on these issues, and others, in our strategy calls with clients every day, and not every institution is ready to commit budget to social media. But rather than just listen to us opine on planned giving marketing best practices, wouldn’t it be great if we went straight to the source, and asked members of the planned giving industry what they were doing?

We did just that.

In the beginning of September 2022, PG Calc sent out a survey on planned giving marketing asking our clients and friends what marketing they are doing today, what works, and what doesn’t. In full transparency, some of these organizations are PG Calc *Marketing Services* clients, but the majority were not. Based on the 200 responses collected from these planned giving professionals, this paper will answer the above social media question, and more, by discussing best practices and showing the data we discovered via the survey.

This report aims to help planned giving professionals see how their views, techniques, and plans for the future stack up against others. Some of the answers may surprise you.

## DON’T WORRY, BE HAPPY

*If the grass is greener on the other side of the fence, you can bet the water bill is higher.*

— Author Debbie Macomber

We started our planned giving marketing survey by asking if respondents are satisfied with their current planned giving marketing, and 60% said “yes.” However, if you pry a bit more into that “yes” you’ll find that 56% of those people are truly very happy, and the remainder are not necessarily thrilled, but more or less happy. Their marketing is “good enough.” Yet, if you combined those respondents with those who are not satisfied that becomes a 66% majority of all respondents, leaving only 34% very happy. In fact, in the question below you will see the most popular answer was, “No, we should be doing more.”

Are you satisfied with your current planned giving marketing?	
34%	Yes, we are very happy
27%	Yes, it's good enough
37%	No, we should be doing more
3%	No, we are not doing anything

Why is that?

It might be the “grass is always greener” theory that no matter how amazing your situation is, or how much you do, someone always seems to have what you want, and that what you have is never good enough. Whether it is a better life, or in this case, more time, more leads, or a bigger budget, this idiom encapsulates the human quality of always wanting something different than what you have. Yet in reality, it is rarely ever the case. Your neighbor's yard isn't greener than yours, it is likely the same, and sometimes your neighbor is actually coveting what you have.

Be it envy or self-doubt, we think the grass is greener because we feel we're neglecting our own grass. It's not being watered. It's not being fertilized. But the reality is it probably is being cared for sufficiently with the time and money you have. There is nothing wrong with wanting to do more. It's human nature, which is why we have vendors in our industry. They allows us to do more within our limited budgets and compete with our neighbors. There is low-hanging fruit available with a consistent message, so there is no excuse if you are doing nothing. Again, the best advice is to just do what you can with the time and money you have. The fact that the majority surveyed are not satisfied with their marketing is actually a good sign for our industry.

## STRATEGIC PLANNING

*“If you don't know where you are going, you'll end up someplace else.”*  
– Yogi Berra

An effective marketing plan will give you strategies and tactics to reach your goals. So, we asked, “Do you have a written planned giving marketing plan?” Sixty-one percent said “yes.” This was a pleasant surprise. For those who are new to marketing, your plan should consist of goals and objectives, a defined strategy, and list of the tactics to achieve your goals, and lastly, the reporting and analysis to tell you how you are doing. A marketing plan that works for one organization will not work for all. Your plan must be tailored to your charity and its mission.

These four areas (goals, strategy, tactics, reporting) are sequential and must be addressed in the order listed. A strategy cannot be formulated before objectives are established, tactics can only be determined once a strategy is in place, and reporting and analysis can only take place once the program has been executed. Creating the plan by itself will not make you a better marketer or bring in more gifts. It is your execution of the marketing plan that will. Following

your plan will result in more organized and efficient marketing. If you are a small program with little staff and little time to waste, the more prepared and methodical you can be the better.

The marketing goals set for your program identify what you want to accomplish. Establishing and publicizing your marketing objectives will allow you to proceed with confidence, knowing your efforts are aligned with your organization’s plans. It also allows you to share your strategic marketing vision with senior management with the hope that doing so will ensure your program is allocated the resources needed to get the job done. We then asked:

<b>What is the most important goal for your planned giving marketing?</b>	
<b>34%</b>	<b>Awareness building</b>
<b>15%</b>	<b>Education</b>
<b>48%</b>	<b>Lead generation</b>
<b>3%</b>	<b>Other, please specify:</b>

48% said lead generation is the most important goal, which was a bit surprising since I would have guessed it was building awareness of planned giving and their program. Don’t get me wrong, there is nothing wrong with seeking leads. Every program needs to find donors, and build relationships with them while discussing issues of estate planning and the creation of the donor’s legacy. Yet, it is one of the most difficult things to do. If you have a huge budget and can pay for traffic to your website with Google Ads, or other paid for platforms, it certainly can be done. But for the smaller budgets seeking a larger boost of leads from your marketing it may be unrealistic.

This is because in planned giving the cause and effect of your efforts are not transactional. We are not selling like a for-profit and not asking for money like an annual fund. We are educating and reminding donors of the opportunities that planned giving brings. As such, the approach for planned giving campaigns should not be focused on closing one gift or making one conversion. Instead, your messaging is about improving the long-term, strong relationship that already exists. It should be to foster a relationship that educates donors on the benefits of a planned gift, and the impact that gift will have. This, in turn, encourages legacy building.

You need to invest time and resources into a relationship with your donors. Educating them and building awareness of your program so when they are ready, they reach out to you. You cannot force that. You cannot expect each mailing to produce a certain number of leads/conversions individually or annually. This is because even the best tactics can’t alone create planned giving interest. It’s usually a life cycle change that causes donors to finally reach out about their legacy, not a marketing piece. Your mailings may result in an immediate response, or one that takes several years to germinate. You never know.

Yet, it is those tactics that re-affirm the relationship. They are vital to let the donor know, *“We are here when you need us, and in this mailing/email is something you may find of*

*interest.*” Consistent messaging works. Your marketing must be seen as a marathon, not a series of sprints.

## **MESSAGING and TACTICS**

*“Spread your story and messaging out, over time, and over different types of media in short segments that invite people to want to learn more.”*

— Author Loren Weisman

Make sure your marketing message and collateral are consistent, and that your marketing tactics are focused to achieve your goals. Good messaging can create interest and get people to act. So, what should your planned giving messaging say? We asked:

<b>In your messaging, what is the most important thing you want to convey?</b>	
<b>16%</b>	<b>Simplicity of planned giving</b>
<b>37%</b>	<b>There are many ways to create a legacy</b>
<b>6%</b>	<b>Tax benefits of planned giving</b>
<b>30%</b>	<b>The impact a planned gift will have on your mission</b>
<b>3%</b>	<b>Details about the gift vehicle or assets described in the marketing</b>
<b>8%</b>	<b>Other, please specify:</b>

This is a bit of a trick question because one can argue it should be all of the above, (and some respondents did tell us that in the “other” category). However that would be too obvious of an answer, which is why we forced the respondents to pick one of the above statements.

37% choose that “there are many ways to create a legacy” was the most important message they should get across. This is a true statement, of course, but it can be dangerous if you overwhelm donors with too many options in a single marketing effort. At PG Calc we believe in the old direct mail adage that if you give people too many options, they will choose none. This is why your marketing should diversify the options available to create a legacy over time and through multiple mailings, each focused on a single topic.

I am glad to see the impact of a gift was second at 30% and the details of any particular gift was last at only 3%. Your messaging should always be more about the huge impact a gift will have on your mission rather than the technical aspects of any gift. Tax benefits can be important to many donors, but the bottom line is that a planned gift can create a life-changing impact like no other. Even the use of the terms “planned giving” or “bequest” can be troublesome to some donors. It can seem confusing and/or overwhelming. Yet once they learn the basics, your donors will begin to comprehend that a planned gift can be made simply and be very rewarding.

As to tactics, we asked:

<b>What marketing tactics do you use (choose all that apply):</b>	
<b>91%</b>	<b>Website</b>
<b>53%</b>	<b>Print newsletter</b>
<b>45%</b>	<b>Print traditional postcard</b>
<b>49%</b>	<b>Print mailer with attached reply card</b>
<b>36%</b>	<b>Print letter</b>
<b>37%</b>	<b>Buck slip insert</b>
<b>63%</b>	<b>Email newsletter</b>
<b>40%</b>	<b>Email single issue mailing</b>
<b>32%</b>	<b>Social media posting</b>
<b>28%</b>	<b>Donor Survey</b>

The most popular tactic of those responding is the use of a website, at 91%, although I worry about the 9% that don't have one, or do not consider it a tactic. A website is the first marketing effort we advise clients to create when considering a planned giving program. In today's digital world, if your planned giving program does not exist online it does NOT exist at all. You need an online presence, and your website is proof that your planned giving program exists. It also gives you the opportunity to show your full "bill of fare," reflect your core mission, and establish your program's viability.

The layout and flow of your website creates an atmosphere and perception of the level of service they will receive from you. If your planned giving site is complex, they may think planned giving is too complicated. If it is devoid of useful information, they may think your planned giving program is not sophisticated enough to handle planned gifts. A website without serious content does not just leave the donor wanting more, but what's worse, it can leave them with the perception that it's all you know

The 2<sup>nd</sup> most used marketing effort was the email newsletter at 63%, with the print newsletter next at 53%. I am not surprised to see how popular the newsletter is, nor how a digital version ranks higher than the print version. Email is much more budget friendly. Of course, just because it is cheaper to produce and send, does not mean it is better marketing. Nothing works better than a piece of mail that can be touched and saved. If you are considering between the two, ask yourself how many times you print out and save an email, versus the ease of saving a print newsletter on your desk. At PG Calc, we say in most cases email should be used in addition to, rather than in lieu of, your direct mail.

Regardless of format, email or print, a good planned giving newsletter should educate donors on the benefits and ease of making a gift, with a donor story to illustrate these points. The planned giving articles should be topical, informative, and interesting to read. The newsletter should incorporate your brand and include design best practices. Images of donors and infographics should be included to help explain difficult concepts. No one wants a newsletter that is too dense.

To do it right takes time and effort and often the best option is to use a vendor who can design your newsletter and provide the planned giving content.

But is the newsletter the most effective tactic? We asked:

<b>What do you consider your most effective tactic?</b>	
<b>15%</b>	<b>Website</b>
<b>21%</b>	<b>Print newsletter</b>
<b>21%</b>	<b>Print mailer with attached reply card</b>
<b>5%</b>	<b>Print letter</b>
<b>1%</b>	<b>Buck slip insert</b>
<b>17%</b>	<b>Email newsletter</b>
<b>8%</b>	<b>Email single issue mailing</b>
<b>1%</b>	<b>Social media posting</b>
<b>11%</b>	<b>Donor Survey</b>

A print newsletter tied a print mail self-mailer with attached reply card as the top performing tactic at 21%. Of course, this is only true, as stated above, if your newsletter has valuable information and is an interesting read. At that point it can be a good source of leads and build the awareness of your program better than anything. The inclusion of a donor story in each issue brings like-minded individuals direct to readers and shows them the impact and the self-satisfaction of giving.

The biggest surprise here is how low the donor survey fared at 11%. Perhaps not enough respondent planned giving programs have tested it. If you are interested in generating leads, then a donor survey should be in your marketing mix. We have seen some pretty remarkable results. More later.

## **THE ANTISOCIAL MEDIA**

*“I think social media has taken over for our generation. It's a big part of our lives, and it's kind of sad.”*

— Kendall Jenner

Let's get back to that question about TikTok, and should you add it, or any social media, to your planned giving marketing mix?

Here is what the planned giving industry said when we asked the following:

What marketing tactic works the least?	
19%	Website
8%	Print newsletter
9%	Print traditional postcard
4%	Print mailer with attached reply card
5%	Print letter
11%	Buck slip insert
8%	Email newsletter
4%	Email single issue mailing
27%	Social media posting
6%	Donor Survey

Yes, social media is seen as the tactic that is the least effective according to 27% of respondents. It's easy to be seduced by Facebook and TikTok with their audiences of billions worldwide, but according to Blackbaud research, only about 1% of all online fundraising can be attributed to social media.

No social media platform is focused on connecting with donors and getting them to pull out a credit card. Facebook for one, is not the place where people want to be educated on life income gifts, and Twitter may have been the former President's channel of choice, but planned-giving professionals time and time again say that social media has yet to earn a place among their most valuable tools.

Perhaps when the TikTok generation enters their 60s social media will start to have a significant impact on planned giving marketing. At PG Calc, we tell our clients to test social media at least once a year. Get a baseline. See if you can push any traffic to your website with a good donor story and watch over time as the engagement rises. Soon you may want to schedule some regular posts, or test paid posts or ads. But as of today, your expectation regarding social media as a marketing tool should not be high, whether you are building awareness or seeking leads.

## DIRECT MAIL

*"Neither snow, nor rain, nor heat, nor gloom of night, stays these couriers from the swift completion of their appointed rounds."*

— Herodotus

The above is not the official Postal Service motto though most Americans think that. This phrase comes from The Persian Wars by Herodotus, a Greek historian. During the wars between the Greeks and Persians (500-449 B.C.), the Persians operated a system of mounted postal couriers who served with great reliability. The phrase was added to the New York City Post Office building in 1914 by one of the buildings architects, and the narrative was born. It is



not a tribute to the men and women of the USPS, but nonetheless we should thank them for the delivery of direct mail.

Custom direct mail that includes your organization’s mission and branding is essential to your planned giving marketing. Your older donors will respond to messaging directed to them on an emotional level. Younger donors will respond similarly, but most of your younger audience will respond because a direct mail message is different from the constant barrage of email and social media noise they receive. This makes direct mail stand out as something unusual.

Either way, it’s the personal nature of the message that is the key. The content of the mailing must be tailored to your donors and your mission. There are many vendors available to help you with your direct mail campaigns. Make sure they create a custom product that includes your mission and imagery. Also consider a print-on-demand relationship, which may help in the budgeting process.

But how often should an organization mail? So, we asked:

<b>How many times a year do you send out print direct mail?</b>	
<b>6%</b>	<b>1</b>
<b>21%</b>	<b>2</b>
<b>17%</b>	<b>3</b>
<b>20%</b>	<b>4</b>
<b>5%</b>	<b>5</b>
<b>15%</b>	<b>6 or more</b>
<b>16%</b>	<b>We do not</b>

Be it a newsletter, postcard, or a self-mailer with a reply card, all direct mail should promote your program in the most positive way: educating with planned giving content, reassuring with mission, and triggering emotion via images. Yet, only mailing twice a year seems really low. That was the top response at 21%, just ahead of four times per year (20%), which is what we would normally suggest at a minimum.

If you are just sending twice a year and not sending anything else, try adding additional mailings. Or look to email to send in between mailings, which is perhaps more cost-friendly to your budget. The bottom line is that your marketing must be consistent. This is why thinking about getting something in donors’ hands at least once a quarter makes sense. Sometimes your best donors might see your direct mail several times before reaching out to you. They save it and discuss it later with a spouse or advisor. And when the time is right, they call you.

## EMAIL MARKETING

*“A bad email reputation is like a hangover—hard to get rid of and it makes everything else hurt.”*

— Chris Marriott, President of Email Connect

If you take a look at any study over the past 20 years of email marketing you will see that when respondents are asked how marketers could improve their emails, the #1 answer is “less frequent emails.” More than twice any other option given. Email frequency is something recipients care about. A lot.

Over-sending email is a deterrent to your program. This is why it is important not to mail too often. Remember an unsubscribe is forever. What is the right amount? We asked the following question:

How many times per year do you send email marketing?	
3%	Weekly
24%	Monthly
11%	Every other month
29%	Quarterly
20%	3 or less
13%	We do not

29% of respondents said they use email quarterly, and we think that is spot on. We do not agree with the practice some vendors have of sending email weekly or monthly. Although very few are sending weekly at 3%, 24% of respondents stated they are sending monthly. That’s dangerous.

Why? It comes down to respect. The days of “spray and pray” marketing are over. Today’s donors expect highly targeted messages that give them what they want, when they want it. This is why before you send an email, you should ask yourself, “what value does my donor gain from receiving this message?” and “How can I provide the most value to the donor by making this relevant to them?” Some vendors send more generic content to stay on a schedule, even if that content will not produce the best results. If the message does not help achieve your goals and objectives... don’t send it!

Over-sending usually results in open and click-through rates dropping, and worst of all, unsubscribes and spam complaints. Again, once a donor unsubscribes they are gone forever. And if they stay on the list and believe your email is not worth reading they will never open it again. It’s a matter of trust. At PG Calc, we want to steward that trust, thus we suggest only sending quality emails that are a benefit to the donor. Simply put, there is not enough newsworthiness in the planned giving arena to justify a weekly or monthly email. However, a

quarterly email or every other month with a donor story and complementary planned giving articles tailored to your mission can fit well into your overall marketing program.

Always remember, your content must be relevant and tailored. Your messaging is more important than the routine of sending.

## **PLANNED GIVING RECOGNITION SOCIETY**

*“Please accept my resignation. I don’t care to belong to any club that will have me as a member.”*

– Julius Henry [Groucho] Marx

A planned giving recognition group, often referred to as a heritage or legacy society, can be a useful marketing tool for promoting your planned giving program. It also is an effective way to steward planned giving donors. 88% of our respondents said they have a legacy society, which is great news.

A legacy society can strengthen the relationship your planned giving donors have to your organization, which subsequently may increase the retention of revocable gifts and potentially increase the number and size of future gifts. It can also be used to identify donors who have included you in their will or estate plan. These intentions that were unknown often come to light in exchange for membership in the society.

Then we asked:

<b>Is your legacy society part of your planned giving messaging?</b>	
<b>42%</b>	<b>Always</b>
<b>9%</b>	<b>Never</b>
<b>50%</b>	<b>Sometimes</b>

At 50% “sometimes” was the most popular answer. Yikes. And only 42% always mentioned the society. That is interesting. Why would you not always include content on this society? Pushing the membership can show readers that a planned giving donor falls into a special classification of supporter, and that publicly they will be thanked, recognized, and stewarded. Many donors find this attention endearing. Of course, some supporters will prefer to stay anonymous, and that is just fine. This just seems like a missed opportunity.

How would you promote it? We asked:

<b>1. How do you promote your Legacy Society?</b>	
<b>2. 28%</b>	<b>3. We ask donors to join.</b>
<b>4. 47%</b>	<b>5. We just add all donors who give.</b>
<b>6. 15%</b>	<b>7. Explain the benefits.</b>
<b>8. 10%</b>	<b>9. We don't promote it.</b>

There is no singular set up of a Legacy Society. Each organization may structure it differently as to qualification for membership. Many organizations make membership all-inclusive in that any one of the various planned giving methods qualify one for membership, regardless of size and whether the commitment is revocable or contingent. Membership can be limited to deferred gifts, or have other barriers, but most organizations allow their Legacy Society to be as inclusive as possible. And hopefully each donor's charitable gift that is recognized in the society will inspire others in your community to follow their leadership.

Thus, to promote it, explaining the benefits of the society can be very important. Make your society sound like an exclusive club that only the top supporters have access to. Outline the benefits of becoming a member. Give your prospects reasons to join. Most importantly, a Legacy Society lets the donor know your institution is grateful for planned gifts and provides you opportunities for personal stewardship.

However, when asked how respondents promote the society, 47% said they just add all donors who give. Only 15% explain the benefits. Another missed opportunity perhaps?

Or is this because they have no benefits to speak of?

Unfortunately, that might be the case. Often these societies are created in a rush, and they are not well thought-out. This may be because gift planning was told to start one and was not given proper guidance. Worse are the societies where more time was spent on their name than their reason for being! On the other hand, a lack of benefits could also be a function of staff time and budget. If there is no staff to champion the society then it just exists, and it is not being used to its upmost potential.

What should the benefits of joining the society be? It varies, but here are some benefits we see often:

- Donor recognition in printed materials, websites, or in a physical space. You can also recognize donors at public events or ceremonies.
- Membership certificates signed by high level leadership.
- Membership pins. These are budget friendly yet resonate with some donors in particular. It also serves to publicize the legacy society when donors wear them events.

- Events that bring the donors insider information or experiences, such as cutting-edge research, meetings with senior leadership, and invitations to events that speak to your mission.
- Invitations to dedicated legacy society events.

## WHAT ARE YOU PROMOTING?

*"I am just a businessman, giving the people what they want."*

– Al Capone

Clients ask us all the time what gifts they should promote in their planned giving marketing. It reminds me of the famous criminal Willie Sutton, who was once asked why he robbed banks. His response was, *"Because that's where the money is."* Whether Sutton actually said this is not really known, but as a marketer it sure is good copy. If bequests account for 80 percent of all planned giving, then you would be crazy not to push bequests. Right?

We asked our respondents these two questions:

<b>Which gifts do you promote in your marketing?</b>	
<b>90%</b>	<b>Bequests</b>
<b>78%</b>	<b>Beneficiary Designations</b>
<b>82%</b>	<b>IRA Rollovers/QCDs</b>
<b>75%</b>	<b>General Estate planning</b>
<b>78%</b>	<b>Charitable Gift Annuities</b>
<b>49%</b>	<b>Charitable Remainder Trusts</b>
<b>64%</b>	<b>Appreciated Securities</b>
<b>44%</b>	<b>Real Estate</b>
<b>49%</b>	<b>Donor Advised Funds</b>
<b>3%</b>	<b>Other</b>
<b>What is the number one gift your marketing focuses on?</b>	
<b>63%</b>	<b>Bequests</b>
<b>5%</b>	<b>Beneficiary Designations</b>
<b>5%</b>	<b>IRA Rollovers/QCDs</b>
<b>9%</b>	<b>General Estate planning</b>
<b>10%</b>	<b>Charitable Gift Annuities</b>
<b>2%</b>	<b>Charitable Remainder Trusts</b>
<b>0%</b>	<b>Appreciated Securities</b>
<b>1%</b>	<b>Real Estate</b>
<b>4%</b>	<b>Donor Advised Funds</b>
<b>1%</b>	<b>Other, please specify:</b>

No surprise to see 90% of our respondents push bequests, and that 63% see it as the number one gift they focus on. However, I was surprised to see overall that the next most popular gift to promote in planned giving marketing is the QCD. This outright gift is great to push to donors because not only does it remind our 70+ donors about the tax-free giving opportunity, and to remind them of the RMD requirement which can be a gift, but it also opens the conversation about using retirement assets in charitable giving. And with a good relationship, this annual gift will lead to a beneficiary designation of those and other retirement funds.

## **WHO ARE THESE PEOPLE?**

*“And you may find yourself in a beautiful house, with a beautiful wife, and you may ask yourself, Well, how did I get here?”*

– David Byrne

We received 200 responses to our survey sent to planned giving industry professions. We asked them two simple questions to gain some perspective as to who they are. First, we asked:

<b>What vertical is your organization?</b>	
<b>43%</b>	<b>Higher Education</b>
<b>6%</b>	<b>Secondary Education</b>
<b>13%</b>	<b>Healthcare</b>
<b>4%</b>	<b>Arts</b>
<b>8%</b>	<b>Aid</b>
<b>4%</b>	<b>Advocacy</b>
<b>8%</b>	<b>Religion</b>
<b>5%</b>	<b>Environment</b>
<b>1%</b>	<b>Assisted living/Hospice</b>
<b>6%</b>	<b>Community Foundation</b>
<b>2%</b>	<b>Other</b>

PG Calc historically has worked with a large number of colleges and universities, so it is no surprise that higher education leads the vertical markets that responded. It is our experience that planned giving marketing is not dictated by the vertical market, as much as it is influenced by these two factors: a) the mission of the individual organizations and its impact, and b) its size. Yes, size normally equals budget. As such, we asked this follow up question:

How many people work in the “office of planned giving?”	
41%	1
19%	2
12%	3
11%	4
5%	5
12%	6 or more

41% of respondents work in a one-person planned giving office. Yikes. A one-person shop can be difficult because you have to do everything. You have to work a portfolio of donors, handle gift administration, and do all the marketing just to name three of the many hats required. These smaller offices also have smaller budgets. And sometimes decisions are made based on lack of time and money rather than what you know is right. This certainly might explain why 37% of respondents stated they were not satisfied with their marketing and should be doing more. One person can only do so much.

Yet, all is not lost. The one-person shop is why planned giving vendors are instrumental in our industry. They allow a single person to outsource gift administration and marketing while they spend their time speaking with donors. So, when looking for a vendor, do your due diligence and look for a vendor that will save you time while accomplishing what you need them to do.

## VENDORS

*"There is no shame in asking for help; it is one the most courageous things you'll ever do and will lead to greater connection with those around you."*

— Laura Lane.

We asked our clients if they use a vendor for planned giving marketing and 66% of respondents said yes they do. Many organizations use multiple vendors to help with all their marketing needs while others use just one. Of the 34% that are not using a vendor, 68% of respondents have used a marketing vendor previously. And 11% of all respondents are currently not using a vendor but would be interested in learning more about how a vendor can help them.

Here is the question we asked:

Do you use a vendor to help with your planned giving marketing?	
56%	Yes, and it is working great
11%	Yes, but we are not satisfied
23%	No, but we have previously
11%	No, but we would be interested in learning more

We are glad to see so many of the respondents working with vendors. It's not just because we are a marketing vendor, but because it is best for their planned giving programs.

Nothing is worse than having a donor contact you and having that lead drop through the cracks. This can result in the donor going elsewhere with their charitable dollars. Donors want to support your organization not just for its mission but also for your ability to effectively use their gift. If you can't return a call, how will you manage their gift? And remember, it can be more than just a gift to them. It's their life savings. Their legacy.

Leads being dropped happens in for-profits and non-profits alike. It is caused by gift officers being overwhelmed and not having a proper plan in place to handle not just donor leads and the administration of the gift, but the entire marketing process. Don't let this happen to you. Determine who is going to do what ahead of time. Plan it out and include a procedure that outlines the process from receiving a lead, to closing the gift, and the continuing administration and stewardship of the donor.

A marketing vendor can help you keep promoting your program throughout the year and give you the time to stay on the road continuing to build relationships via in-person meetings. This is why choice of vendor is very important. Not all vendors will save you time, and not all will help you strategically continue to market to donors throughout the year as you travel. Choose wisely.

There is also planned giving software available to help you with your time management. Programs that focus on bequest giving can purchase software that will ensure you are maximizing your organization's ability to steward donors and realize distributions. It allows you to manage legacy gifts from intention to realization, successfully manage the probate process, and receive sophisticated reporting and in-depth analysis of your program.

The bottom line is you must ensure that once a donor responds to a mailing, or reaches out for more information after reading through your website, that someone is ready to respond with a personal call to answer questions, provide additional information, or schedule a personal visit.

## WE LOVE SURVEYS

*"Your most unhappy customers are your greatest source of learning."*

— Bill Gates



PG Calc believes surveys should be a part of your marketing mix. They provide a snapshot of the attitudes and behaviors – including thoughts, opinions, and comments – of your donors. They are also an untapped resource for planned gifts since they allow donors to self-identify as prospects and otherwise unrecognized legacy society members. Most importantly, surveys can be leveraged to generate qualified leads who just may be ready to take the next steps.

Survey questions are written to allow your respondents to raise their hands and tell you they are ready to make a legacy gift. Not only that, but the mere fact that they have taken the time to offer valuable feedback, regardless of how they answer, means they should be flagged as highly engaged prospects. And this fact alone is enough to justify reaching out to them immediately for a discussion on making a bequest or other legacy gift.

Case in point, this research survey was put out to learn more about what organizations are doing with their planned giving marketing. We did however add two questions for the purpose of lead generation. In a question about vendors, we asked if responders need help with their planned giving marketing by including the option, “No, but we would be interested in learning more.” 18% of the respondents answered that, and many gave us contact information.

Also, at the end we gave respondents the option to check a box with the statement, “Please contact me about improving my planned giving marketing” and 6% of the respondents asked to be contacted. So, with very little effort we improved our lead generation.

Isn't it something you want to try? If so, PG Calc can help. At your convenience, please reach out to us and ask how we can help you with a donor survey.

## CONCLUSION

*“Now this is not the end. It is not even the beginning of the end. But it is, perhaps, the end of the beginning.”*

— Winston Churchill

We hope this look into our industry helps you make more informed decisions with your planned giving marketing. In today's multi-channel world new trends in marketing pop up every few weeks. New technologies in social media can spread messages farther than they have ever been spread before. Ignore that noise. This is planned giving.

Be persistent and consistent in your communications, and sensitive to changes in a donor's life circumstances. As the largest source of planned giving revenue, bequest giving deserves your time and resources. By understanding the concerns of your donors and addressing them with beneficial information, you can have legacy giving conversations that will impact your organization for years to come.

Thank you.