



MARKETING TRENDS FOR 2014 AND THEIR EFFECT ON PLANNED GIVING

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I. INTRODUCTION

Marketing is one of the most difficult, and yet, most necessary, things that a planned giving officer can do. Keeping up on marketing trends and new developments is nearly impossible. The purpose of this paper is to discuss the trends in marketing for 2014 and how those trends will affect your planned giving marketing program.

Direct mail is still the most effective way to reach a targeted audience. A recent study from Global Industry Analysts claims that global direct mail marketing costs will grow to \$25.45 billion by 2015. Another study conducted by the Chronicle of Philanthropy states direct mail appeals to donors are still responsible for the largest percentage of money raised by nonprofits.

I was taught that the two most important things about direct mail are copy and list. We'll talk about both of those concepts below in some of the trends. But otherwise, direct mail as a channel did not make the list of trends. Direct mail is by no means dead. It's alive and well and should be a part of your marketing plan. It's just not trending.

I've researched both the for-profit and non-profit worlds for what's new and what's influencing marketers today. Some of these trends might seem basic while other trends might surprise you. All of the trends discussed here can have an impact on your planned giving marketing. However, that doesn't mean you need to jump head first into all of them. You might find you're doing just fine in some areas, that some trends don't apply to you at all, and one or two might be embarrassingly absent from your current plan. Not to worry, that's why you're here.

My goal is that some of the ideas discussed will improve your marketing, and improve your planned gift yields.

II. EIGHT TRENDS

A. VISUALLY ORIENTED DESIGN - A picture is worth a thousand words

Marketers who embrace excellent design and visual content (infographics, photos, and other images) are seeing huge returns in terms of more viewers, leads, and in the for-profit world, customers.

Creating easily digestible, image-centric content has become a best practice online. The trend will only be spurred on by the increasing number of image-based social media platforms. Online articles that include an image get more views. Plain and simple. Just one image per page can make a huge difference in how many people are engaging with your charity.

Infographics combine images with a minimal amount of text to explain a topic and provide statistical information or data from research studies. They are popular online because the well-placed pictures and imagery break the content up and emphasize certain points. It makes the data easier to read and comprehend.

While I doubt that traditional text-based content will ever completely go out of style, it's pretty clear that incorporating images is beneficial to a marketing campaign. Here are some fun statistics...

- 90% of information transmitted to the brain is visual, and visuals are processed 60,000 times faster in the brain than text. (Sources: 3M Corporation and Zabisco)
- 46.1% of people say a website's design is the number one criterion for determining the credibility of the company. (Source: Stanford Persuasive Technology Lab)
- Publishers who use infographics grow in traffic an average of 12% more than those who don't. (Source: AnsonAlex)
- On Facebook, photos perform best for likes, comments, and shares as compared to text, video, and links. (Source: Dan Zarrella)
- 37% of Pinterest account holders log in a few times every week; 28% said they log in a few times a month; 15% log in once daily; 10% log in numerous times a day. (Source: PriceGrabber)
- 98% of people surveyed with a Pinterest account said they also have a Facebook and/or Twitter account (Source: PriceGrabber)
- Pinterest generated more referral traffic for businesses than Google+, YouTube, and LinkedIn combined. (Source: Shareaholic)

People love images online. Google understood this when it launched 'Universal Search' back in 2007, introducing images into its search results. They also understand that most people will choose the search listings with photos attached and thus released Google Authorship, which allows authors to link content they publish and have their picture appear in the search results. (It requires a Google Plus account) If you're blogging or posting fresh new content, Authorship works. It will maximize the visibility of your article and increases click-through rates. It provides a clear competitive advantage.

Photos help tell stories, convey meaning, and capture moments we'd like to remember.

We're "visually wired" – almost 50% of our brain is involved in visual processing. We consume gigabytes of the written word every day, so it's no wonder that images come as a relief from our regular information overload. And while information is often conveyed through images, visuals are much simpler.

The huge growth of Instagram and Pinterest over the past year further reinforces that pictures are more engaging. Pinterest is the fastest-growing platform for online content sharing, outstripping both LinkedIn and Facebook.

Look at these 2 men:



Which one would you rather have sit next to you on an airplane? Or ask advice from?

Although we don't know anything about them, we all make a judgment call based on their looks. Good or bad, right or wrong, it happens. And the same thing happens every day on your website. We judge and make assumptions, all based on appearance. All based on visuals. They can help or hurt you. Online, visual appeal should govern your website design. In our world, visual design can move prospective donors halfway to a decision before they read the first word of your carefully crafted content.

Our own website focus group testing confirms that first impressions about websites can mean more than the copy. 75% of subjects cited design-related reasons for rejecting and/or mistrusting a website. Design has a strong impact on your conversions, the user experience, and customer loyalty.

Here are three leading trends in web design:

1. **Professional design.** Plenty of white space. Don't over-crowd with ads, links or side column filler. Use images with your copy. Keep the margins clean. Amateurish-looking, over-crowded websites kill.
2. **Easy to use – and worth using.** Research shows that sites win credibility points by being both easy to use and useful. Create content to cater to your visitors, not your institution's ego. Don't try to dazzle with gimmicks.
3. **Fresh content.** People assign more credibility to sites that show they have been recently updated or reviewed. Nothing says "out of business" or "run away" like a stale, abandoned-looking website.

In sum, visuals – in the form of images and design - are more important than ever. They can help you rank high in web searches, become popular in social media, and build credibility on your website.

B. LESS IS MORE - Simplicity is the ultimate sophistication

One notable trend is the use of simple marketing messages instead of in-depth messages. When you think about some of the top for-profit brands in the world like Apple and Google, they clearly value simplicity. A large part of Pinterest's appeal is its clean, uncluttered, and minimalist look.

Our society is getting burned out by a constant barrage of information and advertisements that scream "look at me." The new trend is to go in the opposite direction. Marketers are toning down their campaigns to not overwhelm consumers with hype.

People in all demographics have become web-savvy, mobile-enabled researchers capable of sifting through multi-channel information in order to read the news or make a purchase decision. Your planned giving prospects are looking for trustworthy information that helps them easily and efficiently weigh their options. But too many options and messages can paralyze decision making.

So keep your message simple. Make your design clean, the benefits of giving clear, and the contact process simple,.

The public's attention span is getting shorter as more and more we are bombarded with new messages, and marketing channels. As a marketer you have less time to make an impression with your prospects. Instead of bombarding them with every shred of information that you can fit in a given space, keep your messages brief, relevant, and easy to understand.

Again, Pinterest's mass appeal proves people want simple. Google understands this, too. Is there a homepage less cluttered than Google's?

Make it easy

Your goal is to make every interaction with your organization as easy as possible. Your users should not have to struggle to figure out how to contact you or where to click. It has to be intuitive and self-evident. Again and again, studies show that each additional click to complete an action costs you visitors. How short are your conversion paths?

Go to your website... could a grandma find basic information on gift annuities on your site within a click or two?

Do not give your prospects too many options. The more choices you offer, the easier it is to choose nothing. Choice can paralyze. This applies online and offline. If you have a lot of options, build pathways so your prospects can identify the right ones for them without spending too much time.

And don't force users to enter personal data in order to get more information. Do you know the story of the 300 million dollar button?

There was a major for-profit retailer, whose site was basic and simple, but after filling up a cart, the user was always prompted to log-in or register before finishing a purchase.

The marketing team assumed that returning users would know their info, and the new users wouldn't mind setting up an account, since they'd probably be back. This would give the marketers access to email and postal information even if the purchase never went through with their purchase.

I understand their intent, but it was a massive mistake.

Sales were far below expectations, so a usability firm was called in to study the metrics. They found that the prospect of registering was turning users away. Even return users had problems logging in because they didn't remember the email address or password they signed up with. The consultant also found 45% of users had multiple registrations—some had as many as 10. For a retailer with \$25 billion in sales, this signified huge lost revenue.

The usability firm redesigned the site. Changes included things like replacing the "register" button with "continue." The updated site now informed visitors that registering wasn't required to checkout (but stressed the convenience and savings benefits of registration for the shopper).

The result? Sales went up 45%—\$15 million in the first month, and \$300 million in the first year!

There is a lesson we can all learn here. It's important to research how people actually behave on your site. You can guess what people might do but you never know until your site goes live. Then... test and study your metrics. And be willing to make changes.

As in the case above, if you make people enter their contact information to access planned giving information, you will see far fewer downloads. In addition, 15-20% of the contact information you do manage to collect will be fake! Offer basic, but still valuable, content to your visitors with no strings attached. Real prospects will return for more details and will be more willing to provide their information in exchange.

Clarity trumps persuasion

I visited a marketing consulting site recently and found this in the mission statement:

"Revenue-focused marketing automation & sales effectiveness solutions unleash collaboration throughout the revenue cycle"

Do you know what that means? I do marketing consulting, and I sure don't. I'm not sure how all that jargon will convince anyone to contact them, let alone hire them.

Don't try to impress using complicated legal language, technical jargon or buzzwords. It just doesn't work. Write for your audience. Review all your marketing material. If there's a sentence or phrase that you wouldn't use in a conversation with a friend, change it.

In sum, planned giving can be complicated but your job as a marketer (or at least wearing the marketing hat) is to keep it simple. The most successful collateral is clear and concise. It focuses

on only one type of planned gift at a time. And do not talk in acronyms. You are having a conversation with a friend whether it is on a website, email, direct mail brochure - or in person.

C. TESTING – a marketer's lifeblood

Increasing your conversion rates in marketing is absolutely crucial. For planned giving marketing, a conversion can be measured every time a prospect picks up the phone to call you or emails you for more information. Turning more prospects into qualified leads means more planned gifts.

But how do you convert “lookie loos” into prospects, prospects into qualified prospects, and qualified prospects into closed gifts?

More advertising? More web content, or email? More time, effort, and money poured into marketing?

All of this could work, but it's much faster and cheaper to do it by increasing your conversion rate. The best way to do that is testing. Testing is more popular than ever (and trending) not just because it works, but because online you can do it with Google for free.

Testing is the one rule of marketing that surpasses all others. No matter how well your landing pages or e-mails may be performing, they can always do better. If you don't have a goal for constant improvement, you're missing out on prospects that you should be talking to.

Sometimes just a small tweak can lead to significant improvement. Many small and a few big tweaks combined can bring a dramatic increase in your results.

A/B testing

The easiest way to test is A/B testing. A/B testing, or split testing, is a process where you run a simultaneous experiment between two pages with a single difference to see which performs better. It is a method for validating that any new addition or change will actually improve the page's conversion rate.

You create two alternative versions of your page (page A and page B), each for example, with a different headline. A/B testing software directs 50% of the incoming traffic to page A and 50% to page B. Both pages have a call to action, and in the end you count how many people took the action. The page with more conversions (more people taking action) wins. NOTE: split testing cannot be considered conclusive (that is, statistically valid) unless 1) the total number of test subjects is more than an agreed upon number, ex. 1,000 recipients; or 2) one option or the other is a runaway winner.

While it may seem overwhelming at first, “continuous testing” is the mark of a successful marketing program. It seems more common online because it is so much faster to test one or more options and easier to measure results, but don't forget to test your direct mail campaigns, too!

Deciding what to test

For the sake of space, let's limit this discussion to testing a website landing page. Typically you'll want to test pages that:

- have the most traffic, and
- are the most important in your conversion funnel

It's important to test one hypothesis at a time - otherwise you won't know which change made the difference. Here are 3 popular test ideas...

1. The headline. You should have a strong, compelling headline that encourages the reader to read more. I believe in a copywriting principle called the four U's. Every headline, subject line and/or bullet point should be Urgent, Unique, Useful and Ultra-specific. Try to incorporate them all. Let me explain.

Urgency in headlines convinces people to take action. It triggers them to learn more and open the email, click through to the article, or just begin reading. It gives the reader a timely reason to continue. Urgency is so powerful that you can't fake it. If you do, your copy will sound too pushy or salesy and you'll lose the reader. If it's not present, use the other three.

Uniqueness fascinates readers. They like to learn new things. What they don't want is the same old story. Copy that energizes them with something new or different works very well to trigger interest.

Useful information inherently promises a benefit to the reader for their time reading. If your content isn't useful, why should visitors read it? Usefulness compels them to keep reading. Include a benefit, solve a problem, or otherwise provide value.

Ultra-specificity dictates the usefulness of your message. A vague headline rarely works. If the reader doesn't understand the promise you are making or the benefit from the headline, they are less likely to move forward. This doesn't mean you need to write a list, or step-by-step guide. Just remember that exact numbers will pull in more readers than round numbers every time. Specificity heightens credibility, credibility builds engagement and engagement equals clicks.

2. The Call to Action – The size of your order buttons and the text on the button should always be tested. (e.g. "Join now and get our whitepaper" vs "Sign up" vs "Submit") Try enlarging your call-to-action buttons, or using different colors. Standing out might work better than blending into your institution's style guide.
3. Layout - Test removing all distractions from your call to action. This includes the "exit sign." When I want to really increase the conversion rate I will send readers to a landing page without the main navigation. The reader can only click for more information (make a conversion) or leave (if you must, add a small text link back to your home page).

You can also test...

- Copywriting - All mission, gift type descriptions, etc.
- Forms - Their length, field types, text on the forms.
- Images - Their placement, content and size
- Amount of content on the page (short vs. long)

The key is to then learn from your results and make changes to incorporate what you learn. The retailer example I mentioned above paid an outside consultant to help them realize what they were doing wrong. Getting an outside expert is very helpful when there is a serious issue. The reporting and testing tools available with today's online platforms, however, make it possible to make smaller adjustments to optimize conversion yourself!

Institutional Testing Notebook

Do you remember the last test you conducted? Can you look it up and tell your colleagues what was tested, details of the test, and the results?

You should.

Start a planned giving testing notebook. Document all your tests. This will become your institutional marketing memory. Document your hypotheses, test execution and results. Include the problem you are trying to solve, your proposed solution, the metric(s) you are using to measure success, and what will determine success. This notebook is the best way to train the next generation of planned giving marketers in your development office.

And Today It's Free

Historically, online testing software was very expensive, but now with Google Content Experiments it's free. The system is built into Google Analytics, so if you are already running Analytics you are half way there. Google Content Experiments can test up to 10 full versions of a single page, each delivered to users from a separate URL.

In sum, there's no excuse for NOT testing. Testing is easy, fast, and actually fun! You get to test your hypotheses, learn new things all the time, and exercise your creativity. It makes everything you do as a marketer better, and leads to more gifts.

D. CONTENT MARKETING – Show your expertise to gain credibility

Creating content beyond recitations of your own product or service features has always been important for earning credibility with customers and prospects. In 2014, it's even more important for both for-profit marketers and their non-profit peers. Today, your audience can and does access information more easily and across more channels than ever before. The good news is that you as a

marketer can reach far more people (often at lower cost) than ever before to create awareness and nurture prospective donors.

The content you create can be adapted to aid in this process across multiple channels to accommodate donor preferences. Your presentations should be as at home on a laptop computer or tablet as they are on paper. New mediums like video can capture the attention in a way your beautiful brochures cannot. Bring news about your organization or a capital campaign to life with expressive posts on social media channels.

Sorry, got ahead of myself for a moment. Let take a step back.

Content marketing is the act of creating and distributing relevant and valuable content to attract and engage your target audience. The goal is to prompt the target to take action. In the fundraising world, that action could be something like picking up the phone or filling out an online form to request more information. Content marketing operates on the assumption that there is a population willing to trade their attention for information that is useful to them. It's a powerful, cost-effective method of acquiring new prospects.

Lately for-profit companies have been finding sales growth and loyal customers by producing useful, original content rather than blasting out promotional messages (the broadcast model). Ironically, this borrows from the traditional nonprofit practice of focusing more on education than self-promotion! You don't need a budget for a television advertising campaign when an avidly-read newsletter will do. Quality relevant and engaging content is one of the main ways that any institution can establish authority and gain trust.

Prospects who engage with your charity are increasingly expecting content that will help them learn more about your work and show them why their support makes a difference. Your content needs to serve three different audiences: (a) non-donors who don't know your organization (prospecting); (b) non-donors who know your organization (cultivation/awareness); and (c) existing donors (stewardship). Effective marketers create and/or use available content to meet the requirements of all three audiences, although not necessarily in the same message.

Building Trust

Sales guru Zig Ziglar once said that there are only 4 reasons why people won't buy from you... no need, no money, no urgency, and/or no trust.

Your organization's mission might well be to create awareness of a societal need, or of the urgency of a health issue. A universal need for fundraising organizations, however, is to earn the trust of donors and prospects. We talked before about how attention to design can have a significant effect on how many visitors to your website or recipients of your direct mail solicitation actually make a gift. The first impression is hugely important in creating a bond of trust with the donor. What other factors affect that fragile bond?

- Too many ads or advertising in general (in the case of a nonprofit, this might translate to an ill-chosen or too-prominent sponsorship presence)

- Little or no original content.
- Too much design and too little content.
- No clear indication about the purpose of the site.
- Hard to read.
- Looks “spammy” or untrustworthy.

Trust is one of those concepts that seem obvious, but is difficult to explain in detail. Trust from a marketing perspective can be measured online by the willingness of visitors to interact with your website in some way. Trust takes a visitor beyond simply viewing your content to believing the information presented, or acting on it.

Trust is rarely found from one visit or interaction. It’s a more long-term proposition that builds slowly as people use your website, (or read your direct mail), get the information they seek, and don’t feel let down or cheated. Trust is slow to build, yet quick to lose: a single violation of trust can destroy years of slowly accumulated credibility.

So what builds trust? Very simply:

- The site has valuable, compelling information that is easy to find and understand
- The site speaks in the language of the visitor, without condescension
- The calls to action are clear and do not overstep – that is, they leverage the trust and credibility that has been earned rather than ask for “leaps of faith”

Here are some tips I recommend for improving the credibility of your website and building trust.

- Make it easy to contact you.
- Make it easy to navigate and find things.
- Update your content regularly
- Keep all visuals (photographs, graphics, and video) clean and professional; don’t use template or stock photography.
- Make testimonials (donor stories) prominent
- Make the site look like it has the answers someone is seeking.

In sum, creating content for your prospects will build your credibility and help build a relationship. It’s best to have different content for different levels or your marketing funnel, including stewardship. Use this content for multiple channels.

E. SOCIAL MEDIA MARKETING – Leverage your content, and strengthen relationships

The growth of the social and mobile web has allowed us all to connect with anyone, anywhere. When we need information, we can find it instantly. Today’s social networks are the crossroads of the country. It’s the modern day Times Square where for-profits and non-profits need to get their message out. So every planned giving program should be there too, right?

Not necessarily.

Before you get all in a twist tweeting and pinning and posting, let's slow down and determine if your program should use social media and how much. And if the answer is yes, how will you measure success?

Know at the start that social media is (probably) not going to bring in gifts. A non-profit called charity:water received a ton of press last year for raising millions of dollars "via social media." On closer examination, the remarkable results came from the way in which the organization enabled many individuals to leverage social media for donations on its behalf. It was a laudable achievement, but not direct fundraising, and it benefited from an urgent message that lent itself to the channel. It's doubtful that planned gifts made up much of any of charity:water's windfall!

Only 2% of all non-profits on social media raised any money at all in 2012. (2012 Nonprofit Social Network Benchmark Report.) The "social" nature of social media means that its greatest promise as a fundraising tool probably will continue to be indirect – donations to individuals who are fundraising on behalf of an organization. Lack of promise as a direct fundraising conduit, however, is no reason to ignore this channel. Social media can still build awareness and credibility, aid in stewardship, and build a community of volunteers.

Once you decide to include social media elements in your marketing strategy, you will want a plan to break through all the noise, to stand out, even within a small subset of the online population, and nurture a cohesive community. Where to begin? One word: commitment.

See what other institutions are doing; determine what works and what doesn't. Don't follow a path where a peer organization has failed unless you understand what went wrong and how you will succeed. On the other hand, don't choose a path simply because groups with a similar mission and audience are not there yet. Align your approach with your available resources. If you lack staff for such a multi-channel approach, commit to employing one channel well.

Do your research and make sure it makes sense for you and your prospects. Then create a plan with intent and strategy. Plan for an extended campaign, not just the short term. This includes discussing your targeted messaging, identifying and/or creating optimized "social" content (sound bites of text, images, video, etc.), delegating responsibilities with team members and committing to the plan.

Many for-profit and non-profit organizations fail with social media because they never truly commit. They dabble, trying a little here, a little there, and give up in frustration before they even determine what constitutes success, or at least progress. Others spread themselves so thin and jump on every channel that nothing gets a proper commitment.

Keep in mind that social media is evolving. It's no longer only Facebook, Twitter, YouTube, and LinkedIn. Networks such as Pinterest, Google+, and Instagram are on the rise.

Don't Forget Tracking

There are a number of free and paid tools, as well as services, to help you make sense of your business's social data. Social can be expensive due to the time commitment, so if you embark on this journey you need to track it. Here are the most important social media metrics you should be tracking:

1. Audience Growth Rate – Track the number of fans, followers, and other statistics to gauge the size of your community. The growth rate of your audience depicts your social media momentum. Don't get distracted by the total followers' numbers. Look at the rate of growth over time. A four month rolling average is a good start.
2. Average Engagement Rates - Engagement is measuring retweets, comments, average time on site, bounce rate, clicks, video views, white paper downloads and anything else that requires the user to engage. This is the pulse of your network and it shows how your efforts are resonating with your audience.
3. Visitor Frequency Rate – Tracking referrals to your site is great, but tracking the Return Visit % is better. This demonstrates your social network's depth of engagement and strength to your institution. Google Analytics allows you to determine the frequency rates of your visitors. This metric provides much more insight than standard click-through rate numbers.
4. Influence - Influence scores are third party reviews of your network. These services tout themselves as the credit-score equivalent to social media relevancy by distilling your online influence into a single number. It's fun to see and track, but don't take it seriously. The leading companies are Klout and Kred.

Social Stewardship

It's not just planned giving awareness that social can help you with. Social media can be very effective in support of a fundraising or legacy society event. The essence of social media is community-building with like-minded people who have the same interests and have shared experiences. This is why social media works well with alumni groups and other non-profits. Not to solicit, but to support activities, events, fundraisers, and other volunteer activities.

Here's a checklist for using social media for a typical event.

- ✓ Before the Event –
 - Drive every social touch to your registration page, and create an event on Facebook. You want attendees that have signed up to say they're coming. When they join the event, it'll show up in their friends' news feeds. Plus, they can invite their friends with the click of a button and help spread word of your event.
 - Build a list of key influencers that are in your social community. Ask them to spread the word. And don't forget to post regularly about the event. Use images and

videos, ask readers to RSVP on the network and tag VIPs, attendees, partners & others so it will show up in their friends' news feeds.

- ✓ During the Event –
 - “Recruit” attendees who are social media users by creating and promoting a hashtag for the event for posters to include. Others can search on the hashtag to see all the posts in one place. You can even display the tweets or posts rolling in by projecting a hashtag stream at the event!
 - Live-tweet the event if you use Twitter yourself (or delegate the chore so you're not the person hunched over their iPhone all night!). Cover the event like a social journalist.
 - Post pictures and comments. If you have a goal for the event (funds raised, bequests committed to, etc.), post updates for those who may not be in attendance and encourage virtual participation.

- ✓ After the Event –
 - **Keep posting!**
 - Use your social platform to thank all the event volunteers and donors.
 - Reflect on the night's event and lay the groundwork for future events.
 - Post additional info that you did not have time to post earlier.
 - Share video and images a' plenty.
 - Reach out to active posters – they can be your evangelists for future events, as well as great sources for donor stories and testimonials

Make your volunteers feel special through your appreciation. Don't hold back. A good public “thank you” is all some ever want. Post pictures of the volunteers, as well as tag them. It'll show up in their friends' news feeds and you may get even more volunteers next year.

A planned giving department should think hard before determining whether to add social media to its marketing. It can be time-consuming work, and as noted above, a direct payoff may never come. However, you should at least try to work with your communications department to include planned giving in an occasional spot in your institution's social posting schedule.

A final tip: if you have an active legacy society, research adding a presence on a social platform like LinkedIn or Facebook for communication about news and events. Build buzz, get folks excited and have fun. It should all be a part of your stewardship and awareness-building strategy.

F. VIDEO MARKETING - a tipping point for giving

The use of video – for donor stories, for example - can give your planned giving website more emotion and add that little extra to connect with prospects at the most critical stage of the giving process.

It's not just because YouTube recently crossed the 1 billion videos watched per day that makes using video a trend. It's more than that. Video can offer the kind of personal connection to your

online prospects that words and text simply can't convey. A good mission or donor story in a video isn't just a tool for the big budget non-profits. Due to advanced video technology, any institution can create a strong and crisp message on a shoestring budget.

In today's real-time marketplace, video allows you to intensify the speed of interacting in "the moment." The synergy of mobile and social together allows an institution to reach audiences quicker and more effectively than ever before. Plus, videos can convey a message ten times more powerfully than text content. Images and videos have become the go-to viral tactic, for both for-profits and non-profits and that trend will only continue to grow.

Still not convinced? Here are some interesting statistics on video marketing:

- Two-thirds of the world's mobile data traffic will be video by 2017. (Neomobile)
- On April 15 of last year, the day of the Boston Marathon bombing, a record 19,667 Vines were made. (Buzzfork)
- Posts with videos attract 3 times more inbound links than plain text posts. (Source:SEOMoz)
- Over 60 hours of videos are uploaded each minute on YouTube.com. (Source: YouTube)
- 700 YouTube videos are shared on Twitter every minute. (Source: YouTube)
- Viewers spend 100% more time on pages with videos on them. (Source:MarketingSherpa)
- 25 million smart phone users stream 4 hours of mobile video per month. 75% of smart phone users watch videos on their phones, 26% of whom use video at least once a day. (Sources: Ooyala and Ipsos)
- Viewers are 85% more likely to purchase a product after watching a product video. (Source: Internet Retailer)

Vine is a service that allows marketers six seconds of time to get their message across through a video. Six seconds does not sound like much time. On the other hand, 140 characters doesn't seem like enough characters to get a written point across, either. But it works. And they work great together. The short video makes for a concise and targeted message. Vine is poised to grow massively in popularity among marketers next year.

Videos, Vine, Instagram and the like, all are being used to drive website traffic, as well as increase engagement on social media sites. A well thought out video can raise awareness for your cause and can even result in turning prospects into potential donors. Remember, all you need is a smart phone, some creativity and a few minutes.

Here are some ideas for videos :

- A Donor Story: A simple video with a straightforward personal story of a donor making the decision to give. Viewers will see the passion and connect with the cause themselves in the story.
- Show people who you are - Showcase your organization's personality by posting a behind-the-scenes video. (National Geographic)

- Showcase products or services - Instagram Video and Vine are perfect tools for non-profits focusing on the adoption of animals, as can be seen in a video of Parker the Cat from the Humane Society of New York.
- Mission Video: Create a video describing your mission to create awareness towards the needs of the institution.
- Show the impact of a gift: Create an educational video that illustrates the difference a donation can make. Show how a planned gift today will help future generations.
- Encourage participation and volunteerism.
- Have fun and make people smile.

In sum, you don't need a big budget or a huge staff to make a big splash with videos. You are only limited by your creativity. If a picture is worth a thousand words...then how much is a video worth?

G. OPTIMIZING FOR MOBILE DEVICES – you need to market anywhere

"Mobile-first design" was one of the top buzzwords of 2013. This trend should be no surprise since smart phones and tablets have effectively become the center of our multi-platform lives. According to Pew Internet research, 63% of adult smart phone users use them to go online and 34% of these mostly go online using their phone.

Does this mean you have to have a mobile site or redesign your planned giving website for something mobile first?

Not necessarily. Answer these questions first...

Have you personally looked to see if your website is mobile-unfriendly?

Have you checked to see if your prospects are accessing your site via mobile devices?

If they are, what are the top browsers?

The number of mobile device users is only going to increase. According to Forbes, 87% of Internet-connected devices sales by 2017 will be tablets and smart phones. So if a high percentage of your prospects are trying to check you out on a mobile device and your site is not rendering, you have a problem.

Look into switching to a responsive design.

A responsive web design is aimed at crafting sites to provide optimal reading and navigation across a wide range of devices (from mobile phones to tablets to desktop computer monitors). The concept is your prospects should be able to access the information they seek regardless of what device they are using.

But responsive design has some pitfalls.

1. First and foremost the cost to change to a responsive design can be high. It's a budget killer.
2. A responsively designed web page size and load time can be nearly identical to a desktop browser. There is no load time advantage. In fact, due to the amount of code to allow for the site to be flexible to view in multiple platforms, it can be a bit slow to load.
3. Lastly, a responsive design can also cause trouble when working with older versions of the Internet Explorer browser (IE8 and earlier). The pages will not always load properly on older browsers.

So it's best to do your research first before jumping into a responsive design. Use Google Analytics to see the most popular browsers for your prospects first. You might find that they tend to use mostly desktop computers and/or older browsers and the upgrade to a responsive design might hurt them more than help them.

In sum, due to mobile's ongoing growth, if the first impression a prospect has of your institution's planned giving website on a smart phone or tablet is not the experience they expect, you can potentially lose them before you even know they are interested. Responsive design could be the answer. And if you don't address this problem soon, it will only get worse in the coming years.

H. FILE ANALYSIS AND SEGMENTATION – Dig for the gold

We can't talk about planned giving marketing without touching on data. This has been trending for some time now. Working with your data could be a full webinar on its own. I'll just mention a few points here.

Do you remember in the Introduction that I mentioned the importance of copy and list? Well, this is the list.

An examination of your data will allow you to identify your best planned giving prospects and to whom you should send direct mail. This review is instrumental to a successful planned giving program.

Let's define what I am talking about.

Segmentation involves breaking your entire pool of prospects into smaller groups, based on demographic or giving similarities, in order to utilize optimally-targeted messaging or for testing and statistical analysis purposes.

Data mining involves using data points in your database to limit who is solicited, thereby saving costs and improving effectiveness. This targeting can also include using information in your database to go beyond segmentation to create customized queries that will find targeted prospects within segments in order to maximize returns.

It's also been called wealth screening, predictive modeling, and donor research.

Whatever you call it... it's about using data analytics to help build sophisticated statistical pictures of donors that will allow you to focus your fundraising efforts on those most likely to make a planned gift.

And when you are developing your marketing plan, it's ideal to share your messaging with the right people. This discipline will allow you to market to only those prospects most likely to respond, thereby increasing the effectiveness of each mailing. This focus also allows you to mail less, thereby controlling your planned giving direct marketing costs and limiting the possibility of "burning out" your best donors with too many asks.

I call it marketing smarter.

You may have seen the recent Chronicle of Philanthropy article on data mining where it listed success stories from Johns Hopkins University, World Vision, CARE, and Boston College. In the case of World Vision, they analyzed their donor data to decide who should receive direct mail. The result, according to Senior Director Lisa Pang, was fewer solicitations yet better results.

"If you know that by mailing 50 percent of the mail, you can get 90 percent of the income, why would you want to mail 100 percent just to get [the remaining] 10 percent?"

Why is this trending even more now?

According to the Chronicle, "...the complexity of charities' analyses has shot up as statistical tools have become easier to use, the cost of computing power has dropped, and more consultants and other vendors provide analytics services designed specifically for fundraising."

See: <http://philanthropy.com/article/Fundraisers-Reap-Millions-by/146349/>

Some charities are even building their own data analytics teams within development departments.

Who are the best prospects in your database?

The traditional statistical models look at your donors' lifestyles and giving histories in order to identify your best planned giving prospects. For example:

- Those who already have a planned gift
- Consistent annual fund donors (i.e., 10+ years, 8-10 years, 5+ years, etc.)
- Engaged board members and volunteers
- Those closest to your organization

You can also characterize it as FLAG, (Frequency of giving, Longevity of giving to the organization, Age, Giving history)

The frequency of giving is seen as the single most important gift indicator for planned giving. It is also important to group and rate your donors based on their age and the number of gifts they have given over specific periods (for example, seven gifts in the past 10 years).

Many institutions use a data-analysis package or a scoring service to do this analysis. You can contact consulting companies such as Donorcast (donorcast.com), Blackbaud Analytics (blackbaud-analytics.com), or Marts & Lundy, (martsandlundy.com) to do this work, for example.

If you haven't looked into your data for the best prospects, do it now. Don't walk, run. Market smarter, find more donors, while reducing your marketing budget. What's not to like?

III. CONCLUSION

“Technology always develops from the primitive, via the complicated, to the simple.”
— Antoine de Saint-Exupéry

In today's multi-channel world, if you make your marketing simple, target it, and test it, I think you are headed in the right direction. Today's trends are about marketing smarter. Using the new technologies of video, social, and mobile together can spread your message farther than it's ever been spread before. But not like a shot gun. Those days are gone. The year ahead will allow us to keep learning, and keep targeting our message. For some to mail less, but reach more. That's my hope for all of you.

My prediction is that planned giving marketing will become more effective in the next few years as we all market smarter. I hope this content helps your planned giving program adjust with the times and bring more donors to support your institution.