



The Best Metrics for Measuring Planned Gift Marketing Success

PG CALC WEBINAR

OCTOBER 29, 2015

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I. MARKETING NEEDS MEASUREMENT

“How do you know that your marketing really works?”

Every marketer has been asked to justify their existence or their budget at least once every few years. Whether it's seen as a lack of credibility, or just a failure to communicate the process, there is a perception that marketing is a drain on the budget, or that it is just an arts and crafts function that churns out color brochures.

I've seen it happen at for-profits and non-profits. Marketing does not command the respect it deserves, and thus it is the first thing that gets cut from the budget.

In the world of planned giving, marketing budgets are notoriously small, if they exist at all. As such, terrific non-profits doing great work still struggle to generate planned gifts because of inconsistent awareness marketing.

And while a frugal mindset is not necessarily a bad thing, it can sometimes keep great non-profits from reaching their potential due to lack of marketing. Just as a business needs to attract customers, a non-profit's planned giving program needs to attract donors to the mindset that a planned gift is a viable option.

Your prospects need to be educated on the benefits of legacy giving for their future and the future of your non-profit. Like the business saying goes, “An Educated Consumer is our Best Customer.” The same applies for planned giving. The educated donor is your best donor.

How do you do this without consistent marketing? You can't. So the perception that marketing is a “cost center” and not a “revenue center” needs to change. Marketers need to show that their activities are an integral channel that drives planned giving revenues.

We need to present metrics that matter to our leadership.

It's no secret that a VP of Development doesn't stay up at night worrying about the open rate of your last email campaign or the number of visitors to your bequest page. But they are interested in seeing the number of planned gifts increase versus last year. Or how many prospects are putting their hands up to say, “Let's talk.”

Don't lost in the minutiae. As a planned giving marketer you need to keep an eye on statistics that will prove that your marketing works. And by presenting your marketing in a results oriented fashion you will better communicate your marketing's value and impact to your development goals.

Yet as a marketer in the trenches, you must track and measure the impact of all key marketing activities, both big and small. You must have a handle on the tiny aspects of each campaign while keeping track of the big picture. It's a juggling act for sure.

This paper's aim is NOT to discuss the analytics of your planned giving program, but the pure marketing metrics that will affect the success of your overall program goals. We want to discuss the big picture metrics that will change the perception of your marketing and understand, on a micro level, that some of the specific campaign metrics can be just as important to your bottom line.

II. FIND YOUR RETURN ON INVESTMENT

Your planned giving marketing plan is an investment. And like any smart investment, it needs to be measured, monitored and compared to other department investments to ensure you're spending your money wisely.

As such, your budget each year is often determined directly from your marketing's performance. Its rise and fall is tied to your marketing's ability to quantify how your campaigns and programs deliver revenue (and intentions) in line with your programs overall goals and objectives.

Thus, your program should have a process for evaluating the return on investment (ROI) of your marketing spend.

Tracking your ROI will help you gain true insight that can drive educated decisions for future marketing plans, enabling you to:

- Defend marketing and technology budgets
- Look like a superhero to your VP or board members
- Improve support for existing programs
- Create new programs and initiatives

ROI calculations shed light onto the financial impact of your marketing efforts, opening up the possibilities for bigger budgets and removing those marketing efforts that might cost too much time, money, or resources to break even.

What is ROI?

In business, it is defined as a profitability measure that evaluates the performance of an organization by dividing net profit by net worth.

In other words, it's a results-focused performance measurement. Measuring results isn't exactly a new concept, but with tighter budgets and new, emerging technology available, you will want to be sure your program is getting the biggest "bang for their buck" while producing the most planned gifts.

In order to get a relevant ROI calculation for planned giving marketing, you need to know the income raised and all the marketing costs. This is not an easy as it sounds as the definition of income raised is determined differently from institution to institution. I will leave that discussion for another day.

Find your ROI by dividing revenue (return on investment) raised by total marketing costs (your investment), and the result is expressed as a percentage or a ratio. You should find the ROI across all entire marketing plan, and on an effort by effort basis.

With your ROI calculation in hand, you can focus on the marketing campaigns that deliver the greatest returns or perhaps help justify investing in an outside vendor. Your ROI can help your program move away from the idea that marketing is a fluffy expense that can be cut when times get tough.

For example, one of PG Calc's Marketing Services clients recently finished their marketing program ROI for the first full year of using our strategic Website and Direct Mail services. They found that their \$7,000 investment brought in planned gifts of more than \$19 million during the course of the year. That is an ROI number too big to publish!

There is no discussion within this institution about whether the marketing spend was worth it. They know right where they stand, and to say that the Board of this client is thrilled is an understatement. The question now presented in this case is, "What else can we do?"

That is a good place to be.

ROI looks at your program from a macro point of view. It looks backward but actually has the effect to push your program forward in the right direction.

It's important to plan your program with ROI in mind from the outset. When you quantify the outcome you expect from each marketing investment, you can then determine exactly how you will measure the program against those goals and position yourself to achieve them.

The best producing planned giving programs measure ROI to find not just what works, but what works better. They focus on "improving ROI," not just "proving ROI."

III. SETTING GOALS AND TARGETS

For your planned giving program to track and improve upon your ROI you will need to first establish marketing goals and targets. This includes creating ROI estimates up-front for each marketing spend.

All too often, marketers plan programs and commit their budgets without establishing a solid set of expectations about what impact they expect the program to have.

This is one of the underlying reasons why often VP's and board members question marketing investments. The solution is to assign up-front goals, and benchmarks for each marketing program and thus, overcoming obstacles before they arise.

The first step of any planned giving marketing plan should be to define your objectives and then pick measurable metrics to support those goals.

Whether you are sending a direct mail postcard or building a new planned giving website with an outside vendor, you should think of your ROI with a best case, worst case, and expected case scenario outcomes. This would answer the nagging question of, “What do we think we will get for this spend?”

With ROI goals in place, your VP will not only see the cost that goes out the door, but also exactly what benefit is expected to come from that cost. As a result, they should be much more likely to support the investment.

Don't worry too much about the fact that you are making estimates. Forecasting is an art rather than a science that first year. Once you have hard data, then next year's forecast should be easier and more accurate. Using multiple scenario outcomes also lets you protect your credibility in case things go sour, and shows an understanding of how changes to various assumptions might impact the results. It also shows that you understand the possible risks that would hurt your program's ROI.

It's often a good idea to run your assumptions and targets by the most skeptical members of your team. Ask them to find all the ways the program could fail and help give you suggestions to put in place contingencies to manage the risks.

IV. METRICS COMES FIRST

The best planned giving marketing programs have intentional measurement strategies planned in advance. Here are three questions that all programs should be asking up front:

- What will we measure?
- How will we measure it?
- When will we analyze it?
- When will we apply what we learned?

At PG Calc this is a conversion we have at the very beginning with our Marketing Services clients. Every program should take specific steps to make your marketing programs measurable. This includes setting up your website tracking, or using dedicated landing pages for direct mail, and the like.

This applies to all the marketing you do. Every effort big and small.

When a program does not begin this process early, specifically when working with an outside marketing vendor, they pay for it later. It's like flying a plane blind. The take-off is exciting... and it seems safe for a while but it's dangerous, and too easy to crash and burn. But if you don't know where you are, how can you know where you need to go?

Why take that chance with your planned giving program?

The data that you collect from day one will become invaluable down the road when you attempt any of the more sophisticated approaches towards measuring program effectiveness.

Your tracking data can be stored in anything from your marketing automation system to a simple spreadsheet hosted on a shared drive. The most important thing is that you start to build your marketing history as early as possible.

V. FOCUS ON IMPROVING YOUR MARKETING

Collecting data by itself does not win you any medals. Neither does having a dashboard that overwhelms, or an excel spreadsheet data dump. No one has time to clog through all this and it will not help improve your marketing.

Metrics are not about collecting backward-looking measurements, but it's the collection of data that helps you make better forward looking decisions. It is the difference between data, intelligence, and knowledge.

Or put another way, it's the different between trying to review hundreds of different numbers each month that you don't really understand versus reviewing a handful of key indicators every quarter. The goal of your metrics should be the analysis and recommendations that you take from the data that helps improve your marketing effectiveness.

An integral part of your planning process is identifying up-front what decisions you need to make to drive the acquisition of gifts, and then building your measurements to capture information that facilitates these decisions.

This means you must measure things not just because they are measurable – but because they will guide you towards the decisions you need to make to improve.

These decisions will range from strategic questions about messaging, target segments and theme – not simply “pass/fail” assessments of specific programs or tactics. You can always evolve your mix of tactics, but even the best tactics applied across the wrong strategies won't produce your desired results.

Each metric should seek to augment your understanding of how to make the program better and align it with your program's strategic objectives. This way, even if you don't meet all of your program goals, you can still figure out why and how to improve the program.

VPs and boards don't care about 99% of the metrics that marketers track – but they do care about revenue and growth. There are two primary category metrics that directly affect revenue and growth. The first is the “macro” examination of ROI, as discussed above. The second looks at the “micro” data within your program performance metrics.

VI. THE BEST PERFORMANCE METRICS TO TRACK

While less relevant to your VP or board, these measurements will help you track growth, and with analysis and testing, ultimately lead to a more effective strategic marketing program and an increase in your ROI.

Below is a list of some of the more important operational metrics you should track on a regular basis, organized by program type:

A. Email Metrics

1. **Open Rate:** An open rate tells you how many subscribers opened your message. When you send HTML email, to track an “open” the email must include a tiny, transparent tracking image. This is provided automatically by most email sending providers. When the recipient's browser or email reading software tries to display the email, it reads the code and that counts as an “open.”

By giving each email its own unique tracking image, you can track which recipient's emails were opened, as well as the percentage of the list as a whole. However, this is a flawed metric. It is filled with false positives and negatives.

The tracking image can be activated without the recipient ever actually seeing the email at all. This is often the case if your email clients has a preview function, where part of the email is displayed in your inbox.

The recipient can highlight any email on their screen and hit the delete button without ever looking at its content. But due to the preview function displaying the message, and reading the code, the email registered an "open."

Also, some recipients will read your email and an “open” is still not recorded. This is the case when the recipient gets text-only emails or has an email client that only displays text versions of emails. In this case the image code is ignored and never requested. That means there is no record of an open, and the recorded open rate for that email broadcast misses out on those people.

And it doesn't end there. Many email clients (for example Gmail) now refuse by default to display images so they show the email in its entirety, but ignore all images. Thus, although the email could be read by the recipient the email once again is never recorded as an “open.”

So with such margin of error, why do we care about opens?

Look past the flaws and use an open rate to examine your mailing trends and your email copy. Compare your open rate with that of the industry. Compare it to all the emails you send.

The margin of error may be high, but it should remain consistent.

If the rate is always 50% it does not mean 50% read you message or engaged with your email in any way. Just concern yourself about being within industry ranges. Also, make sure it is consistent within your list. If your rate is always 50% and then it falls to 20% that is a red flag. You might have a delivery problem.

You can also use open rates to compare two messages side-by-side to see what's working and what isn't. Test which subject lines, message topic, images, length of content, etc. get the most opens.

Sample Open Rate:



2. **Click-through Rate:** A click-through rate will tell you how many and which links were clicked. Use this metric to determine how much activity each message generates and which type of content convinces the reader to move forward. It will also tell you what placement of links drive more activity. Click-throughs describe how your subscribers are engaging more than any email metric. It shows prospects are actually reading and are interested much more than opens.

Lastly, it is a best practice to test your email call-to-actions by comparing click-through rates via A/B split tests.

Sample Click-through Rate:



3. **Bounce Rate:** A bounce rate tells you how many emails never make it to your recipients' inbox. There are two types of bounces "hard" and "Soft."

A hard bounce indicates a permanent reason an email cannot be delivered. The most common reason is that the email address does not exist, the domain name does not exist, or the email server has blocked delivery.

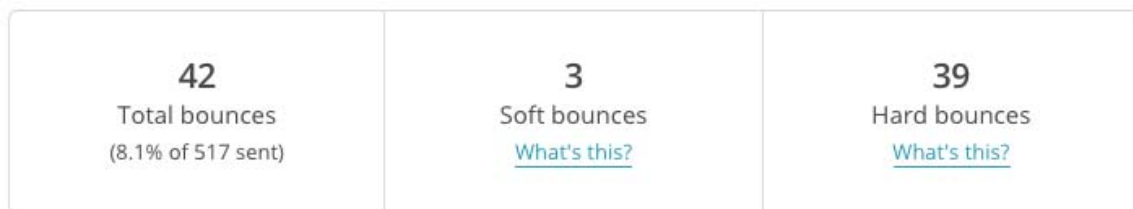
Hard bounces should be removed immediately from your active subscribers list.

Soft bounces typically indicate a temporary delivery issue and should be handled differently than hard bounces. These emails are normally resent by your email system to attempt to delivery over the course of several days. If the email still soft bounces it will remain logged as a soft bounce, and the name remains active on your list.

A soft bounce email can bounce for several reasons: people change jobs, change ISPs, close or abandon their email accounts. These names should be removed only if this soft bounce is consistent and it exceeds the acceptable limits that you have set for your list.

In general a high bounce rate is a signal of list fatigue, list hygiene issues (which may warrant list cleaning) and ISP issues.

Sample Bounce Rate:



4. **Device Statistics:** Device statistics tell you what devices your subscribers are using. This will help you decide how much budget you should spend on mobile marketing, or whether you need to worry about if a particular new technology, for example new Gmail inbox rules, impacts your deliverability.

5. **Spam or Complaint Rate:** A spam rate will tell you how many people mark your email as spam. If you have a high spam rates it could be due to list fatigue or list hygiene issues. It could also be based on the content sent and if the content is not a good fit for that particular list.

By examining the lead source of these emails you may be able to identify whether that source is appropriate for your organization. If a certain source is the primary complainer, stop using that source for names.

Lastly, make sure your unsubscribe process is simple and transparent. This is often the cause of subscribers reporting you as spam.

6. **Unsubscribe Rate:** An unsubscribe rate will tell you how many people opt out of your list. A low unsubscribe rate could mean you're doing everything right, or that no one is reading. A high rate could mean you are sending too often or the content is not relevant to the reader. Always try to develop incentives or strategies to keep your reader engaged for the long-term.

In sum, the best email metric is your click-through rate. It is the only metric you have that proves that your prospects are reading and interested, and thus, it is the one metric that will give you a grasp on how well your email program is operating.

B. Event Metrics

An important part of any event is making sure you're using the right metrics to determine whether or not your event was successful. These are the top 4 measurements for events:

1. **Attendees:** Many marketers believe that event attendance alone determines whether or not your event was successful. It is certainly an important one, but not the only one. An event that grows in attendance from one year to another shows it was successful and people were talking about its value and generating buzz for future events.

You should have a goal in place to increase attendance for an annual event, so make sure to keep track of the number of people who actually attend (which will always be different than the number of people who just registered.)

2. **Amount Registered:** Be sure to monitor people's activities as they sign up for your event. It is essential to know what sources brought the most registrations. Email, website, social media, etc. All should be tracked separately to determine where to spend your time and budget for the next event.

3. **Survey Data:** It is always important to create a survey to distribute to attendees after the event has occurred. The feedback you receive is essential to improve future events. Ask how they heard about your event, what convinced them to attend, what they liked or disliked, and what else they'd want to see in a future event. These questions will help you assess and then modify your strategy for future events to make them more successful.

4. **Social Mentions:** At the beginning of any event, it's a good idea to choose a hash tag and share it with attendees to use in their event tweets and posts. This will make it easier for people who are at the event to have discussions with other attendees. Social media is not often used in planned giving, but with events it's a natural fit for announcing, live reporting, and post-event postings.

See what channel is used the most and track the events live reporting for people who chime in but are not in attendance. They are raising their hand to be contacted for the next event.

Social media mentions is the fastest growing metric for events, and it may become the most important in the future. That said, the best metric today is the data that you collect from a survey. More than anything, it will help you improve the event in the future.

C. Social Media Metrics

The real-time nature of social media and the overwhelming abundance of data collected on users, activity and engagement, provide an amazing opportunity to use social data to enhance and support marketing.

Yet, social media is not prevalent in planned giving marketing and nor should it be at this time. However, it can be very helpful to aid in stewardship and building a community of volunteers. The essence of social media is community-building and the coming together of people with shared interests and experiences. This is why social media works well with alumni groups and legacy societies. Not to solicit, but to support activities, events, fundraisers and other volunteer actives.

That said, I would be remiss if I did not at least summarize the top metrics for social media per channel for future reference.

Facebook Key Metrics

- The number of posts per day
- Page follows
- Likes
- Engagement and comments
- Referring traffic
- Shares
- Lead generation

Twitter Key Metrics

- The number of posts
- Followers
- Mentions
- Retweets
- Number of lists
- Hash tag usage
- Influence of Twitter followers
- Lead generation
- Referring traffic
- Favorited tweets

Pinterest Key Metrics

- Pins
- Re-pins
- Followers
- Purchases from pin
- Referring traffic

LinkedIn Key Metrics

- The number of posts per day
- Page follows
- Comments, likes, and shares
- Group participation
- Referring traffic
- Lead generation

Video Channels (YouTube, Vine, etc.) Key Metrics

- Views
- Shares
- Referral traffic
- Pages ranking on key terms from YouTube

Google+ Key Metrics

- The number of posts
- Google+ circle adds/follows
- Google+ mentions
- Google +1
- Referring traffic

D. Website Metrics

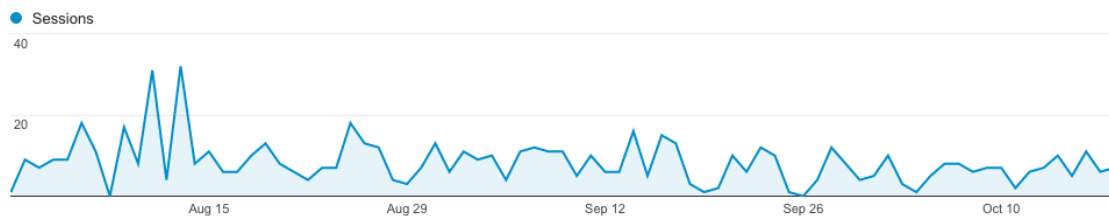
Your website is a treasure trove of data. You can learn a lot about your prospects behavior, but you can also get lost down the rabbit hole of seemingly never-ending numbers. It's best to focus on a few key indicators that will help your site improve its performance for your prospects. For this section I am using Google Analytics as the analytics guide. Here are some top indicators to follow:

1. **Sessions:** The number of sessions is good indication that your website is growing, stagnating, or declining. A session is what we used to call a visit. After 30 minutes of inactivity the sessions is over, and if the same prospect comes back to the site a new sessions starts.

Sessions are also useful for tracking the efficacy of your promotions. For example, if you experience a huge traffic spike after dropping a direct mail piece, this is an indicator that you should be doing more of the same. However, if you're witnessing a steady, long-term traffic decline, this tells you that what you're doing isn't working—you need to try new things.

Of course, traffic figures will only reveal so much, but if you're looking for a quick snapshot of the overall health of a website, it's a good place to start.

Sample of Sessions:



2. New Sessions: The total number of new sessions will tell you how many of your site visitors are new and how many are recurring. It's a good metric to understand because it tells you whether your site is sticky enough to encourage repeat customers as well as how effective your outreach efforts are.

Your planned giving marketing must strive to send as many new prospects to the site as possible. If new visitors are not being pushed to the site each month than that is a big red flag for your marketing. Also, if you change the structure or content of your site significantly and your ratio of recurring to new visitors drops, it could be an indication that your website is losing effectiveness in warranting multiple visits.

Sample of New Sessions:



3. **Traffic Sources:** This metric segments your traffic based on their point of origin. It is useful to see which channels are outperforming the others.

Google Analytics breaks down your traffic sources into four broad categories:

1. Organic Search: traffic coming via the search engines
2. Referral: traffic from another website
3. Direct: traffic typing your domain into the browser
4. Social: traffic from social media

Which source of traffic is best?

That depends on your marketing plan. The best practice would be to drive traffic from all these sources, however, the reality for planned giving is that the majority of the traffic will come from direct traffic. This is the push from your direct mail, email or events. These are the qualified leads and your best chance of converting.

Sample of Traffic Sources:

Acquisition			
	Sessions ↓	% New Sessions ↓	New Users ↓
	660	82.12%	542
1 ■ Referral	465	<div style="width: 70%;"></div>	
2 ■ Direct	143	<div style="width: 21%;"></div>	
3 ■ Organic Search	52	<div style="width: 8%;"></div>	

4. **Bounce Rate:** The bounce rate tells you how many visitors leave your website immediately after arriving. Google Analytics defines these as “single-page sessions. This means that the user didn’t find what they were looking for on your site and decided to leave. It is the equivalent of someone walking in the front door of a store, taking a quick look around, and immediately walking back out the door. It’s not good.

The bounce rate shows you what percentage of visitors leave your website without clicking forward. You want the bounce rate to be as low as possible because the more time someone spends on your site, the more likely they are to convert and perform meaningful action.

5. **Exit Pages:** A “bounce” and an “exit,” are often confused but they are very different metrics. Unlike a “bounce”, which is when a user visits just one page of your site before leaving, an “exit” is when a user visits multiple pages and then leaves your site.

Some pages on your site may naturally have a high exit rate, such as your Contact Us page. After all, most sites are designed to always lead to your contact information. However, having a consistent high exit rate on certain pages can be a red flag. Something on these pages are making, intentional or unintentional, your visitors leave. Are they not finding the information they need? This is troublesome and needs to be address quickly.

4. Top Traffic Pages: Always check to see what your best performing pages are in terms of traffic volume. Knowing what pages receive the most traffic is hugely important because it gives you real-world data showing what your audience responds to.

If you experiment with different types of content, this is where you can begin to analyze what's working, and produce more of the material your readers like. This is why your top pages is one of the best pages to monitor. If I know that my website readers visit my bequest pages more than any other, then that behavior is drastically important. It should help shape future marketing plans.

When you know which content your audience likes best, the next step is straightforward... either produce more of it or send more people directly to what you've got!

Sample of Top Traffic Pages:

<input type="checkbox"/>	Page ?	Pageviews ? ↓
		1,558 % of Total: 100.00% (1,558)
<input type="checkbox"/>	1. /	657 (42.17%)
<input type="checkbox"/>	2. /why-give	122 (7.83%)
<input type="checkbox"/>	3. /how-you-can-give	74 (4.75%)
<input type="checkbox"/>	4. /create-your-legacy	65 (4.17%)
<input type="checkbox"/>	5. /gift-calculator	63 (4.04%)

5. Conversions. A conversion is one of the most important metrics for measuring the success of your overall marketing efforts. A conversion can be receiving a phone call, or an email, or having a prospect fill out a lead form. This sounds really basic but you would be surprised how many marketers forget to track the number of phone calls a website generates each month.

Low conversion numbers could be the result of bad design, poor offerings, or otherwise disinterested visitors.

Regularly checking these website metrics will provide you with an accurate pulse of the health of your digital marketing efforts. Over time, you'll be able to refine your tactics, closely examine which strategies work best and why, and end up with a steady marketing plan that can achieve your goals.

D. Direct Mail Metrics

The ability to test and measure your direct mail marketing is extremely important today. Even more so if your marketing budget is being cut each year and every last penny counts. When we talk about how well your direct mail is working the discussion is simple. It's about response and building awareness. Both are extremely important.

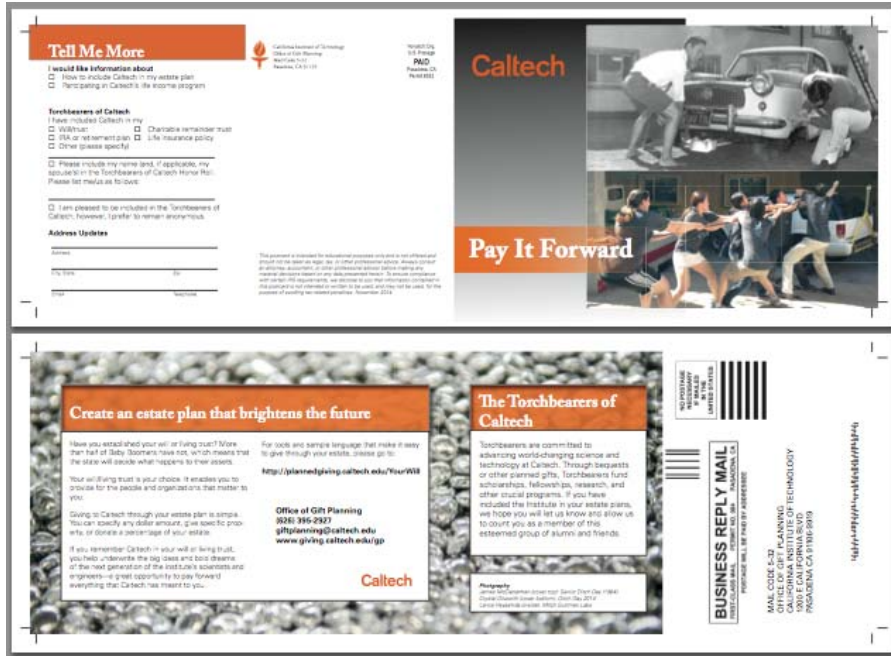
When measuring response, you are looking for how many prospects do what you've asked them to do in the mailer.

This starts when you create the mail piece. Always think about how you're going to measure your response. The easiest way to do that is asking your prospects to call, click, or send back a reply card. Without a call to action that you can track it will be near impossible to judge the responsiveness of the mailing.

Direct mail pieces integrate with your website today more than ever before. Always use a distinctive URL to a relevant landing page in every mailing. Not only will it tell you how many prospects are interested in learning more but you can also see their other interests but tracking the pages they visit. I suggest using a dedicated website landing pages for all correspondence with prospects for tracking purposes.

The Best Metrics For Measuring Planned Gift Marketing Success

Sample Mailer using Website Landing Page:



Sample of URL:

For tools and sample language that make it easy to give through your estate, please go to:

<http://plannedgiving.caltech.edu/YourWill>

Office of Gift Planning
(626) 395-2927
giftplanning@caltech.edu

Sample of Landing Page:

The screenshot shows the Caltech website's landing page for "A Gift By Will". The page features a dark header with the Caltech logo in orange and navigation links: VISIT, APPLY, GIVE, DIRECTORY, ACCESS. A search bar is present with the text "What are you interested in?". Below the header are navigation tabs: About Caltech, News & Events, Research & Education, and Join Us. The main content area has a left sidebar titled "GIFT PLANNING" with links: Ways You Can Give, What You Can Give, Donor and Adviser Resources, Torchbearers Legacy Society, and Contact Us. The main heading is "A Gift By Will" with a "Home" link and social sharing icons. The text explains that a gift by will or living trust is one of the easiest gifts to make, allowing donors to specify property or a percentage of their estate. It addresses the question "But what if you don't have one?" by stating that most Americans don't have a will. The text further explains that if one dies without a will, state laws divide the estate among family members, and none goes to Caltech. It encourages working with an attorney to create a will that accomplishes the donor's goals. A section titled "Ways you can define a charitable gift in your estate plan" follows, with the text "There are several ways that you can define the amount of your charitable gift to Caltech. They are:". An image on the right shows a vintage car being worked on by two men, with the text "Caltech" and "A Gift By Will To Support Caltech" overlaid. Below the image is the text "Paying It Forward".

As long as you have a system in place to measure the number of people responding to your mail campaign, calculating your response rate is simple. Just take the total number of responses and divide by the total number of mailers you sent and multiply by 100.

But do not stop there. Your response rate will tell you how well your mail piece worked to generate action but it won't tell you how much that response will add to your fundraising. That is where ROI comes in again. Always look to determine your ROI on each campaign.

Execute your campaign and wait at least one to two weeks before you attempt to measure the results. Like other print media, direct mail campaigns do not always have the immediate effect that other channels provide.

Direct-mail campaigns have withstood the test of time to become a tried-and-true staple of effective planned giving marketing, but let's not forget our goals and objectives. Is your goal for your direct mail to bring in gifts?

To have prospects raise their hands and requests more information?

Or is it simply to educate and build awareness for planned giving?

Donor cultivation begins with building a positive image of the organization in the mind of prospects, and for some, consistent and professional looking direct mail showing planned giving as a viable addition to annual giving does just that. Also, the more consistent your planned giving cultivation is the better your results will be in the long run. Planned giving direct mail marketing is a marathon not a sprint.

Lastly, the point of measuring the results of your direct mail is not to make yourself feel great if the results are good, and bad if they're not. The point is to enable you to tweak and improve your mail campaign so you can achieve your programs established goals whatever they may be.

VII. CONCLUSION

Metrics are a key to your success in planned giving marketing. Your marketing campaigns needs to produce results and the results need to show you how to improve performance in the future. Both are accomplished via metrics.

Establish your marketing and analytics goals together and then collect your data. Always make time to analyze results, modify your strategy and tactics, and then use that knowledge in your next effort.

Effective marketing is not all numbers. It's about understanding where your prospects are coming from, how they became prospects, and how long they will remain prospects. Add this into your data mix and you will get a true picture, rather than just going off assumptions. This will put your program in the best possible position going forward.