


PG Calc | Your Partner In Planned Giving Success

Marketing Planned Gifts - Q&A Webinar



Date: July 25, 2024
Time: 1:00pm Eastern Time
Presenter: Andrew Palmer
 Director of Marketing Services
 PG Calc

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1

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1. Small budget marketing

What is the most effective marketing method for an extremely small budget?

How does a small(ish) organization develop a planned giving program?

For smaller organizations without dedicated PG staff, what are the most important topics to promote and when? **Q**

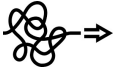
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1. KISS

The Simplicity of giving

And... 


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1. Tactics - Existing Assets

- Checkboxes on reply envelopes
- Annual report
- Newsletters
- Facebook page
- Letterhead and business card
- Internal telephone callers
- Board



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2. Marketing a new program

What is essential for the first year of marketing a planned giving program?




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2. Factors to Consider

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



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2. Create a Plan


The basic component parts:

1. Establish and Articulate Objectives
2. Define the Strategy
3. Execute the Tactics
4. Report, Analyze, and Revise




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2. PG Marketing Is Not Complicated

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



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3. What works best?

Is digital marketing now more effective than print?

What marketing/communication channel is best for promoting PG?

Print vs. Digital - is one proven to be more effective?




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3. Direct Mail is best... for some

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




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10

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3. Digital Outreach is better... for others

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



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4. What is your call to action?

What wording can we use to prompt a positive response to "are you interested in gift planning?" on websites, newsletters, etc?

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12

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4. There are no magic words

Branding and Imagery
+ Education and Awareness
= Credibility

Keep the messaging simple

Make call to action a benefit.




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13

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5. Frequency

What is the best (i.e., most effective) way to market planned gifts? And at what frequency?

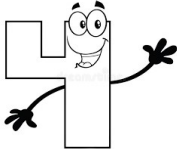


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5. An unsubscribe is forever



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6. Segmenting

What is a good target age range for planned giving marketing?


Should segmenting by age be done within that range?

What is the optimal segmentation for promoting planned gifts?

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16

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6. Find Your Audience


- Planned gift donors
- Consistent annual fund donors
- No children and/or heirs
- Over 65
- Engaged board members

FLAG: Frequency of giving, Longevity of giving to the organization, Age, Giving history.



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7. Donor Stories

What makes a good planned giving donor story?

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18


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7. A good story...

Will define your cause and promote your mission
Educates and inform on the benefits of PG.

The best way to achieve that is by using real donors
as an example. [storytelling]

When we hear stories, we immediately relate them
back to an existing experience... And how that makes
us feel.

We are narcissistic in this way—but it explains
what makes storytelling so effective. 

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19

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7. Real people stories inspire us

Engage people with an inspirational story of your donor!


The story inspires someone to engage... why?

They realize people **JUST LIKE THEM** making a planned
gift they can also have an **IMPACT!**

They receive the **SELF-SATISFACTION** of giving.
That feeling of making a difference. 

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8. What content works?

**Do donors prefer to read
donor stories or more
"how to" PG topics?**

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Charitable Gift Annuities

Who is your audience?

What do they want?

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9. Giving USA

What is the relevance of the Giving USA report to PG?

Is it included in marketing?

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9. 2023 Charitable giving hit \$557.16 billion

More than \$42.68 billion was given via bequests, an increase of 4.8% from 2022.

All-time highs for:

- Human services [\$88.84 billion]
- Education [\$87.69 billion]
- Health [\$56.58 billion]
- Arts, culture and humanities [\$25.26 billion]
- Environment/animals [\$21.20 billion].

Keep marketing!

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10. Metrics

Speak to metrics for evaluating a PG marketing program.

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25

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10. Life Events Dictate Giving

- the birth of a child or grandchild
- the sale of a business
- retirement
- death of a spouse
- etc.

Impossible to predict who will experience a cash infusion or loss that requires reallocation of assets.



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11. Marketing to Women

What methods are successful in marketing planned gift information to women?

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11. It's not the method but the message

Review your materials to ensure women are well represented

Show Impact - the good that their donations will do.


Create ways for them to get involved in your cause socially. [more engagement.] board equally, volunteer opportunities & social events where women will share their experiences.

Good marketing works with everyone...



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12. Subject lines


I have had problems getting recipients to open blast e-mails and digital newsletters.

Do you have any suggestions?

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12. Tips on Subject lines

Create urgency. Only 30 days left to give tax-free in 2024

Create uniqueness. Can we pay you for life?

Write benefit-oriented copy. Tax-wise giving opportunities

Be ultra-specific. Get \$1,450 every year for life

Keep it clear and concise. Why you need a will

Use humor. The perfect going-away gift

Use numbers. 5 gifts that pay you back

Ask Questions. Can I really get paid for giving?

Use pop culture. Always Look On The Bright Side Of Life

A single word. RSVP

Alliteration. How to happily help the homeless.

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13. Social Media

Should we start marketing on social media?

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31

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13. Test it

“Success is stumbling from failure to failure with no loss of enthusiasm.”
— Winston S. Churchill

This is why we test!

TEST
✓ —
x —

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14. Should I offer CGAs?

How do I evaluate if a CGA program will be used by our donors?

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14. Ask them

Have you considered a donor survey?



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15. Donor Surveys

What is the ideal number of questions to ask in a donor survey?

Do I still need to hire a professional company or is DIY possible?

What is the standard for time between surveys?

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35


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15. Leads and valuable insight into your donors

A planned giving donor survey is a fantastic way to learn more about your donors. Whether it is used to fill some holes in your database, for stewardship, or for lead generation the information you learn about your donors is worth the cost. At PG Calc, we can provide:


- Strategy and best practices
- An introductory Email
- Survey Questions
- Survey Page Hosting
- Tabulations with exports to Excel

Make it short, and send every other year



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Still Have a Question?

Contact: Andrew Palmer
Email: apalmer@pgcalc.com

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