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# How to Manage Planned Giving Leads with Ruthless Efficiency

**Date:** December 19, 2024

**Time:** 1:00 – 2:00 Eastern

**Presenter:** Craig Wruck

Senior Advisor, PG Calc



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## If You Walk Long Enough, You'll Get Somewhere



“I may not have gone where I intended to go, but I think I have ended up where I needed to be.”  
- Douglas Adams



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## Challenges

- Efficient use of your time and effort
- Responsible use of institutional resources
- Accountability to the organization and donor
- Productivity measurements
- Ethical considerations



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## Approaches to Getting it Done

- Continuous cultivation; counting on serendipity
- Moves management; a magic number of touches
- Brute force; because, well, hard work gets noticed
- ... or adopt a coherent process providing structure while acknowledging fundraising is both art and science and preserving flexibility to seize new opportunities as they arise



# RUTHLESS DISQUALIFICATION

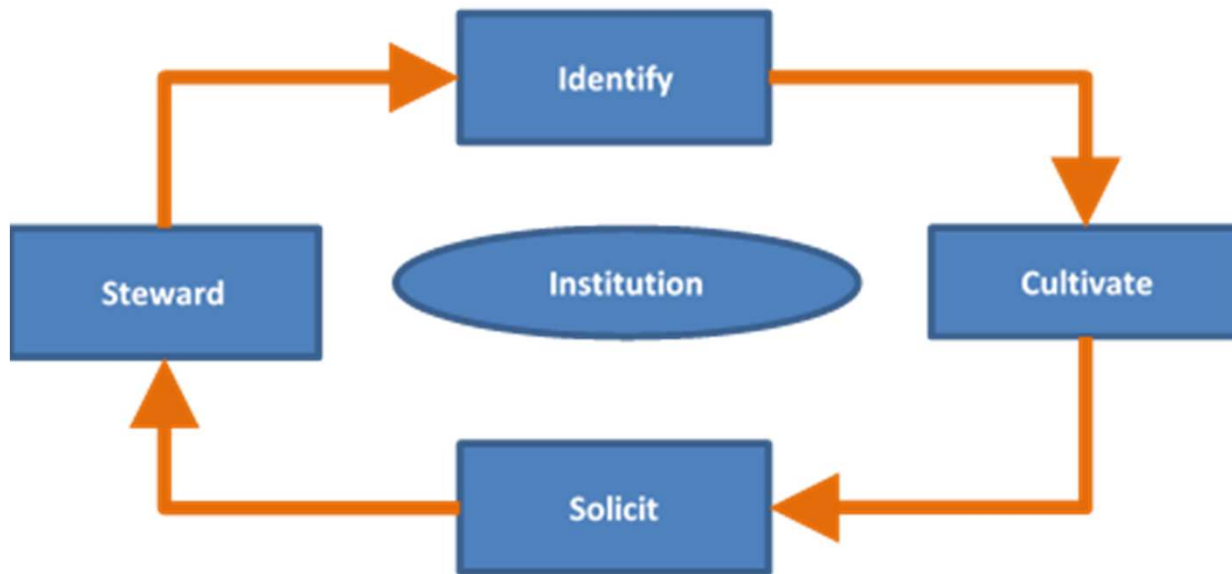
## Sound too harsh?

- Better use of resources
- Honoring prospect's time
- An ethical choice

## Why don't we?

- Fairness and equality
- Delusion: "one more try"
- Fear of failure / missing out

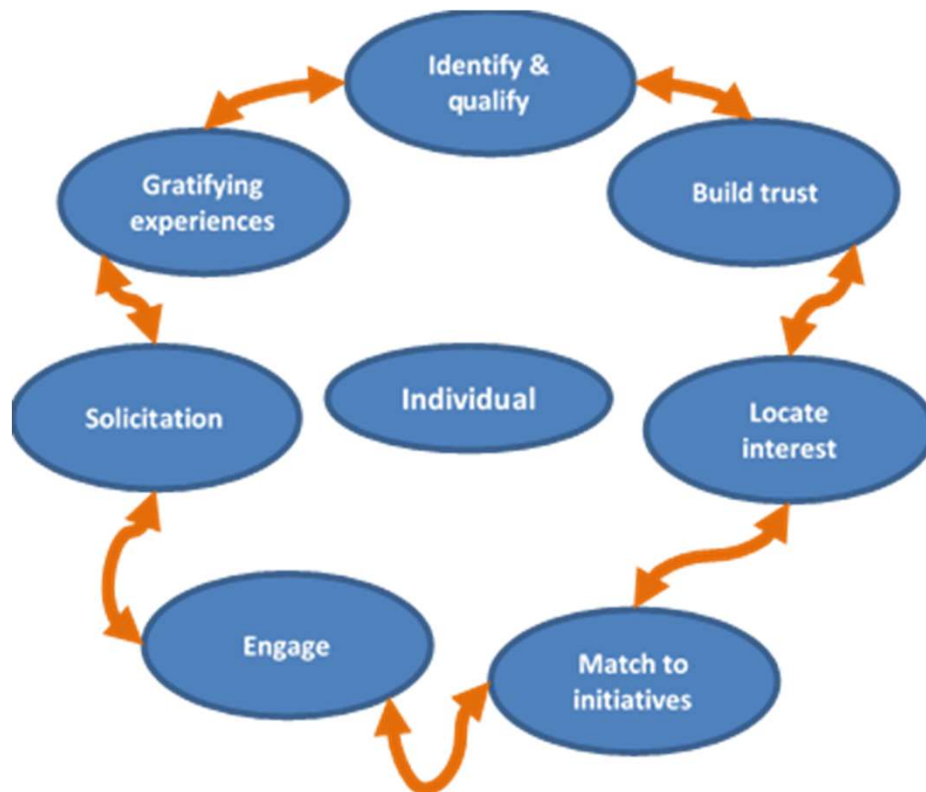
# Conventional View of Fundraising



- Easy to explain & understand
- Simple to manage
- Always know where you are
- Scalable (up or down)

Advancement Resources

## But it Really Works More Like...



- More difficult to explain
- Non-linear: hard to manage
- Focused on donor not organization
- Each cycle builds commitment

Advancement Resources

## But First: What is a Prospect?

*Qualified*

Three characteristics:

**Access** – Are they willing to meet with you to discuss their own contribution?

**Affinity** – Do they care enough about your cause to consider a contribution?

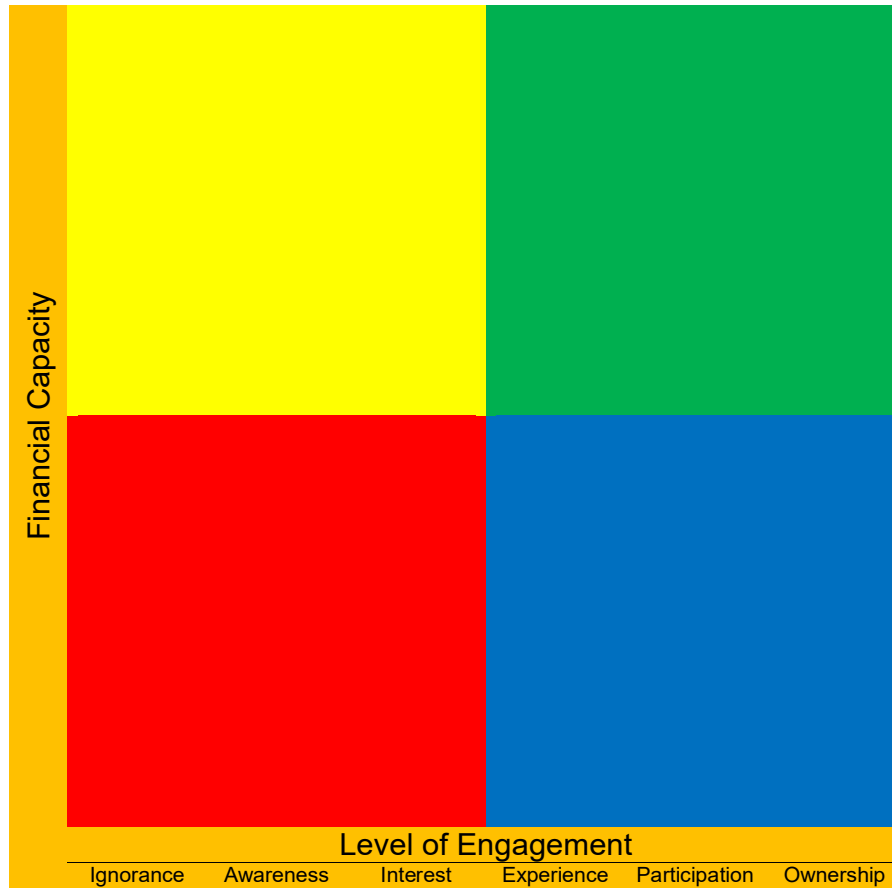
**Ability** – Can they afford to make a contribution at the desired level?





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# Capacity and Propensity



# The Commitment Continuum

## IGNORANCE

- Who are you again?



## AWARENESS

- I've heard of you ... but what, exactly, do you do?



## INTEREST

- I believe your cause is a good one.



## EXPERIENCE

- I've seen the results of your work and am impressed.



## PARTICIPATE

- I feel like I'm a part of your important work.

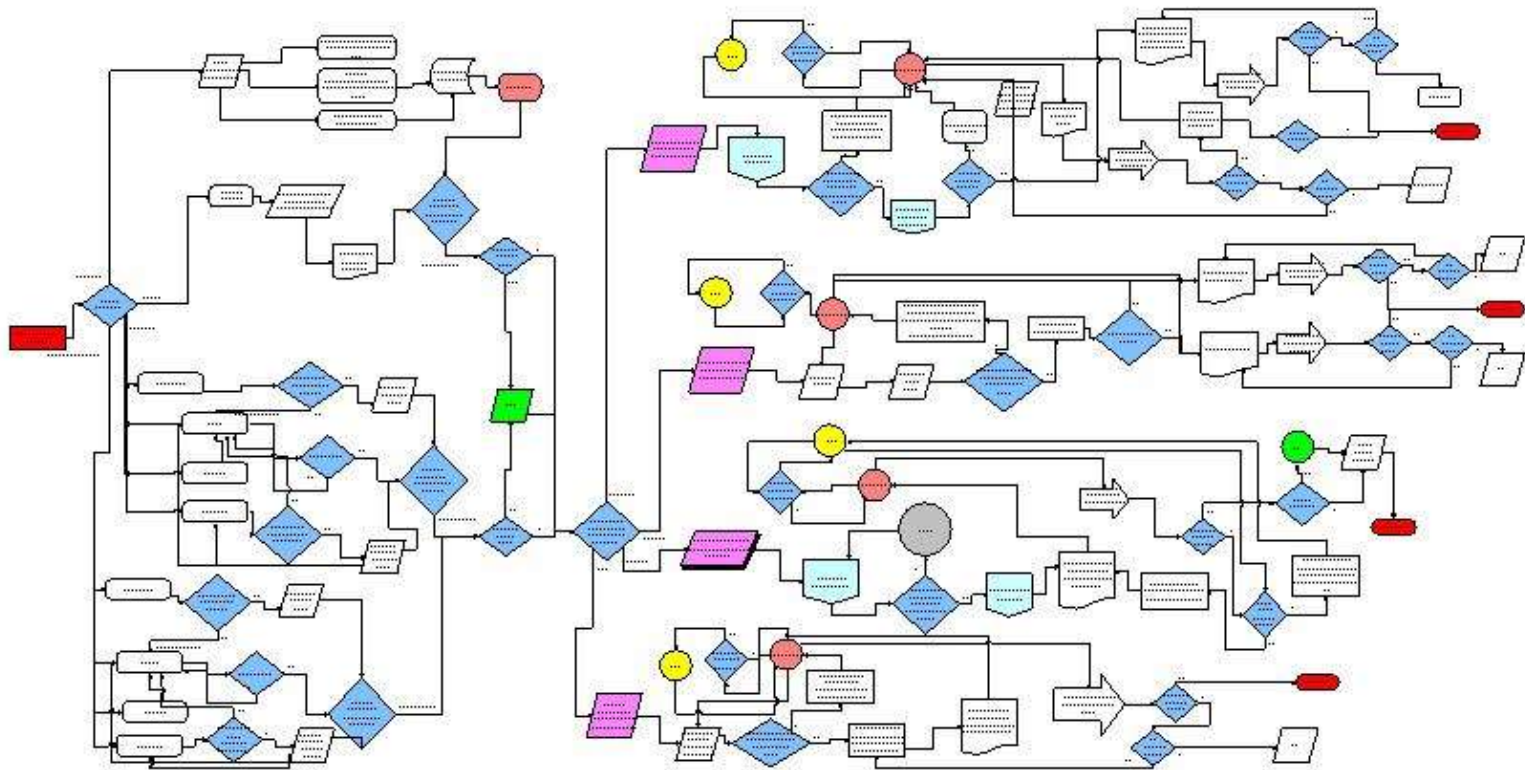


## OWNERSHIP

- I'll take a leadership role in your organization.

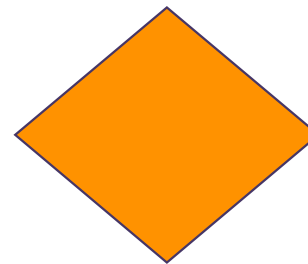
Advancement Resources

# Process Maps

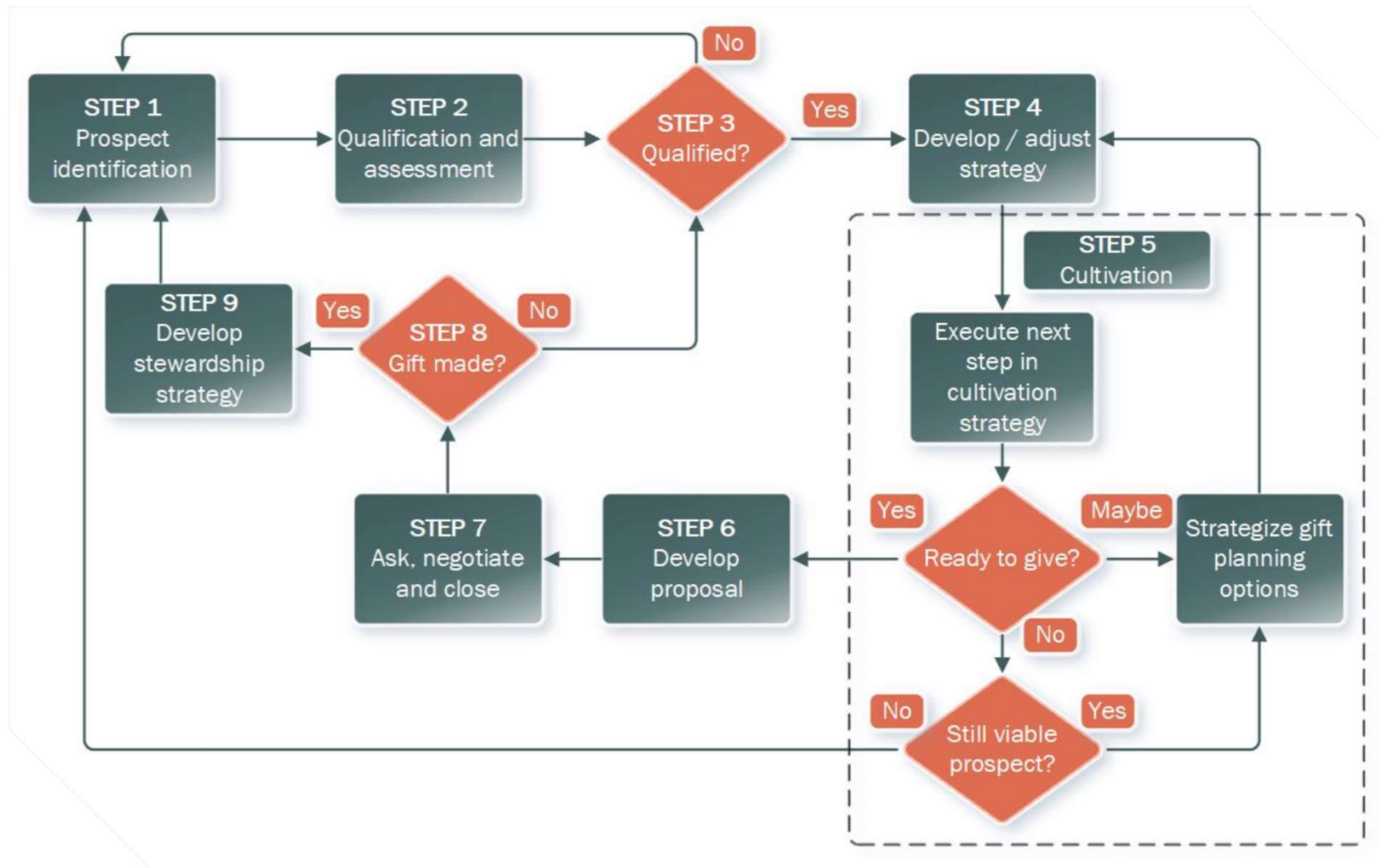




Do Something



Make Decision



## Step 3: Opportunity for...

RUTHLESS  
DISQUALIFICATION



**Access** – Are they willing to meet with you to discuss their own contribution?

- 4 x 2: try four times using at least two different channels

## Step 5: Opportunity for...

RUTHLESS  
DISQUALIFICATION



- **Affinity** – Do they care enough about your cause to consider a contribution?
- **Ability** – Can they afford to make a contribution at the desired level?

Your mother was wrong: it is the gift that counts.

We need milestones along the way:

- Number of proposals delivered (Step 7)
- Percent funded above/below target (Step 8)
- Number of leads qualified *or disqualified* (Step 3)





To ask a question click the  
Q&A button at the bottom

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## Still Have a Question?

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