

PG Calc YOUR PARTNER IN PLANNED GIVING SUCCESS




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

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The Key



RUTHLESS DISQUALIFICATION

Sound too harsh?

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

Why don't we?

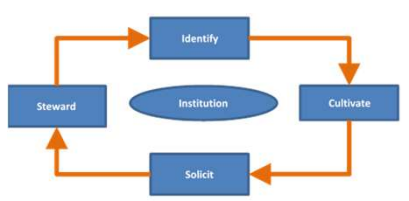
- Fairness and equality
- Delusion: "one more try"
- Fear of failure / missing out

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Conventional View of Fundraising



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graph TD
    Identify --> Cultivate
    Cultivate --> Solicit
    Solicit --> Steward
    Steward --> Identify
    Institution((Institution))
  
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- Easy to explain & understand
- Simple to manage
- Always know where you are
- Scalable (up or down)

Advancement Resources

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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

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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

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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

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Process Maps

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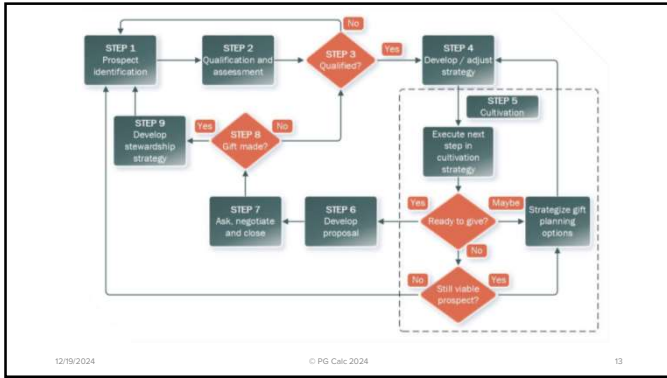
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Process Maps

Do Something Make Decision

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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

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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?

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PG Calc YOUR PARTNER IN PLANNED GIVING SUCCESS **Measuring Productivity**

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)

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

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PG Calc YOUR PARTNER IN PLANNED GIVING SUCCESS **Still Have a Question?**

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