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## Trends in Marketing Planned Gifts



Date: May 22, 2014  
 Time: 1:00 – 2:30 Eastern Time  
 Presenter: Andrew Palmer  
 Director of Marketing Services  
 PG Calc




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## Agenda

- Eight Trends in Marketing for 2014
- For-Profit and Non-Profit
- Planned Giving

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## Planned giving marketing



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# IS YOUR JOB KILLING YOU?

We may allow each other to exaggerate what we see our jobs are killing us, but it might not be that much of an exaggeration. Decades of studies over the years have linked job stress to increased incidences of disease and death. Discover who is most at risk, what causes workplace stress, what the likely consequences are and how both employers and employees can reduce the problem.



WHO IS AT GREATEST RISK FOR WORK-RELATED STRESS DEATH?

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## Trend (1) Visually oriented design

- Easy digestible image-centric content
- Articles with images receive more interest
- Images engage your audience

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## (1) Visuals are a key to your marketing



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## (1) Infographics

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## (1) Work stress infographic

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## (1) Tufts gift planning infographic

Tufts initiated the project and created the copy.  
It was illustrated by John Martz.

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## (1) Gift diagram and calculator

Donor(s) → Give Assets → Gift Annuity → Remainder to Humboldt

Income Tax Deduction  
Fixed Payments

Personalize This Diagram »

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## (1) Interactive infographic

Donor, 75 years old → \$100,000 Cash → 5.8% Gift Annuity → Remainder to Humboldt

\$45,772 Income tax deduction  
\$4,373 Tax free portion  
\$5,800 Annual payments

Personalize This Diagram »

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## (1) Google authorship

What is Planned Giving? - Nonprofit - About.com  
by Joanne Pitt - in 2,387 Google+ circles  
The heart of planned giving is a simple bequest program but can be much more sophisticated with a number of more complex financial instruments.

Planned gifts | Ways to give | Giving to MIT  
giving.mit.edu | Ways to give - Massachusetts Institute of Technology  
When you make a planned gift to MIT, you and/or your beneficiaries (age 50 and up) receive payments for life. Upon the death of the last surviving beneficiary...

Giving to Columbia: Planned Giving Overview  
www.storichill.columbia.edu/planned-giving  
Pave the way for future students, faculty, and special projects at Columbia University through Planned Giving. Every day, Columbia University and its alumni...

Searches related to planned giving  
planned giving brochures planned giving statistics  
planned giving resources planned giving design center  
planned giving marketing planned giving jobs  
planned giving program planned giving council

Googoooooogoo >  
1 2 3 4 5 6 7 8 9 10 Next

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### (1) Who would you rather interact with?



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### (1) Three leading trends in web design

- Clean design
- Easy to use
- Credibility of fresh content

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### Trend (2) Less is more



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## (2) Simple visual design

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## (2) The 300 million dollar mistake

Less clicks equals more conversions

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## Trend (3) Testing

There is no failure. Only feedback.

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### (3) A/B or split testing

The diagram shows a whole red apple at the top. Two arrows point down to two halves of the apple. From each half, two arrows point down to a total of four slices of apple, representing a split test.

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### (3) Popular A/B tests

- Headline
- Call to Action
- Layout

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### (3) Headline, subject line, bullet points

The four U's:

- Urgent
- Unique
- Useful
- Ultra-specific

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### (3) The testing tips

- Test one thing at a time
- Record results
- Manage expectations

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### (3) Institutional testing notebook

- Why, and what happened
- Short pre-test & post-test summary
- Numeric results, interpretation & suggestions

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### Trend (4) Content marketing



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**(4) Educate, engage & entertain**

- Planned giving awareness
- Show why donor support makes a difference
- Build trust and credibility

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**(4) Content builds awareness**

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**INBOUND MARKETING FUNNEL**  
for PROFESSIONAL SERVICES

*Great content till the very last drop!*

- 1 CONTEXT**  
Generate target traffic.
  - organic search
  - social media
  - PPC advertising
- 2 CONVERSION**  
Captivate with rich content that makes a human connection.
  - video, blog posts, webinars
 Offer valuable advanced content.
  - case studies, whitepapers
  - Thought leaders, checklists
- 3 CONNECTION**  
Create a connection.
  - video-to-action
  - landing pages
 Nurture prospective clients.
  - targeted email campaigns
- 4 COMMUNITY**  
Capture the opportunity and build a community.
  - podcasts, interviews, presentations, seminars

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### (4) Newsletter articles are valuable

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### (4) Email too!

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### (4) To send or not to send...

- Is your email a good read?
- Is the audience taking away anything?
- Can they get the same thing anywhere?
- Don't be afraid to be real

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# SOCIAL MEowDIA EXPLAINED

f I LIKE MY CAT  
 Twitter I'M PLAYING WITH MY CAT  
 YouTube WATCH THIS VIDEO OF MY CAT  
 LinkedIn I'M VERY SKILLED AT TRAINING CATS  
 Instagram HERE'S A HIPSTER PICTURE OF MY CAT  
 Pinterest HERE IS HOW TO TRAIN YOUR CAT TO DANCE  
 SoundCloud I FREARIN' HAVE THIS CAT FOOD  
 Google+ I WORK FOR GOOGLE AND I HAVE A CAT  
 RSS I AM LISTENING TO THE SONG "SOFT KITTY"  
 Email THIS IS WHERE I GOT MY CAT HOODIE

AVALAUNCH

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## Trend (5) Social media

- Social is not for every office
- Piggy back on existing efforts
- It's best for awareness and stewardship

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## (5) Is your audience on social media?

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## (5) Baby boomers are here...

- 65+ are the fastest-growing group
- 45 to 54 are the fastest-growing on Facebook and Google
- Boomers aging with technological sophistication

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## (5) Facebook

American Red Cross · 555,662 like this · September 22 at 12:00pm · Like

Today's #NWS131g1 Weather can change fast, and a battery-powered or hand-crank radio may be your only way to get information on what's happening outside. Do you have one in your kit?

Have a battery-operated radio that carries NOAA Weather Radio stations

Like · Comment · Share · 214 Tap Comments · 1,968 people like this.

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## (5) Instagram

Instagram post showing various photography equipment including cameras, lenses, tripods, and accessories. The post is from 'natgeo' and has a list of users who interacted with it.

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## (5) Pinterest

The screenshot shows three Pinterest boards. The first board, 'UNICEF in Emergencies', has 44 pins. The second board, 'State of the World's Children...', has 13 pins. The third board, 'UNITE FOR CHILDREN, UNITED STATES OF AMERICA', has 10 pins. Each board includes a 'Follow' button.

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## (5) Google+

The screenshot shows a Google+ post. The main image features a line graph titled '540M ACTIVE USERS ACROSS GOOGLE' with a y-axis from 0 to 560 and an x-axis with dates from 04'11 to 04'13. A data point for 'Google LTD' is highlighted. Below the graph is a photo of a man smiling and holding a heart-shaped sign that says 'GOOGLE+ (PLU)'.

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## (5) If you jump in, be ready to measure

The bar chart shows the percentage of respondents for various social media platforms. The y-axis is labeled 'PERCENT OF RESPONDENTS' and ranges from 0% to 60%. The x-axis is labeled 'Importance of Social Media Measurement'. The bars are stacked with icons for LinkedIn, Pinterest, Twitter, Google+, and Facebook.

Platform	Percentage of Respondents
LinkedIn	~15%
Pinterest	~25%
Twitter	~35%
Google+	~45%
Facebook	~55%

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## (5) Measure your efforts

- Audience growth rate
- Average engagement rates
- Visitor frequency rate
- Influence

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## Trend (6) Video marketing

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## (6) Great for your website

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### (6) Instagram and Vine

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### (6) Social and video together...

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### Trend (7) Optimizing for mobile

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**(7) Do a cost/benefit analysis**



"What we really need in IT is someone who has super powers."

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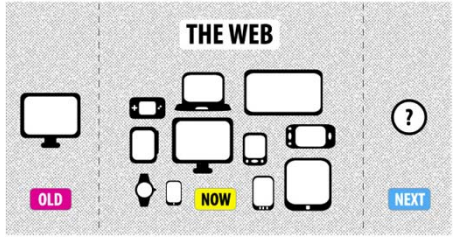
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**(7) What's next?**



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**Tread (8) File analysis and segmentation**

Your best prospects are already in your database.



Audience Data Mining

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### (8) Audience

- Bequest donors
  - Late 40s to late 50s, and 65-78
  - Loyal donors, lower amounts
- Gift annuity donors
  - Ages: mid-70s and older
  - Fiscally conservative
  - Loyal annual fund donors, usually very low amounts

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### (8) BatchCalcs

Thank you for your past support of the work we do at <<Charity\_Name>>.

As a participant in our gift annuity program, I know that you are familiar with the benefits of a charitable gift annuity. Establishing an additional gift annuity in 2010 will not only provide you with fixed payments for life and an immediate charitable income tax deduction, but also with the satisfaction of knowing that you are enhancing the financial strength of the <<Charity\_Name>>.

If you were to create another gift annuity this year with <<Amount>> in cash, you will receive a charitable income tax deduction of approximately <<Deduction>> and annual payments of <<Annual\_Payment>> for the rest of your life. What's more, <<Taxfree\_Income>> of the payments you receive each year will be tax-free during the first <<Expected\_return\_years>> years.

You can also establish a gift annuity with publicly-traded securities or other appreciated property. You may be able to avoid tax on a significant portion of your capital gain in these assets when you use them to fund a gift annuity.

If you would like to establish another gift annuity with <<Charity\_Name>>, or have any questions about how you can support our work, please call me at 888-497-4970 or email me at [fundraiser@pgcalc.com](mailto:fundraiser@pgcalc.com).

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### (8) Drip, drip, drip

- Planned gifts are prompted by life events—death, birth, marriage, health, travel, retirement, etc.
- Keep a regular cadence of marketing
- You never know when the time might be right

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## What's next?



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## Questions?



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## Still Have a Question?

**Contact:** Andrew Palmer,  
Director of Marketing Services

**E-mail:** [apalmer@pgcalc.com](mailto:apalmer@pgcalc.com)

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