



The Best Metrics for Measuring Planned Gift Marketing Success



Date: October 29, 2015
Time: 1:00 – 2:30 Eastern Time
Presenter: Andrew Palmer
Director of Marketing Services
PG Calc



Agenda

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

Discuss the big picture metrics that will change the perception of your marketing

Discuss the specific performance metrics that can help your bottom line



Planned Giving Marketing

An Educated Donor is our Best Donor.





Find Your Return On Investment

Your marketing plan is an investment.





ROI Is Your Friend



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A Simple Formula

$$\text{ROI (\%)} = \frac{\text{Net Program Benefits}}{\text{Program Costs}} \times 100$$



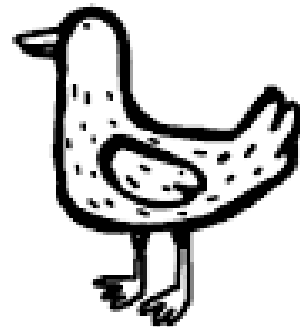
A Revenue Center, Not A Cost Center

ROI is a “macro” look backward, but it can push your program forward in the right direction.





Setting Goals And Targets

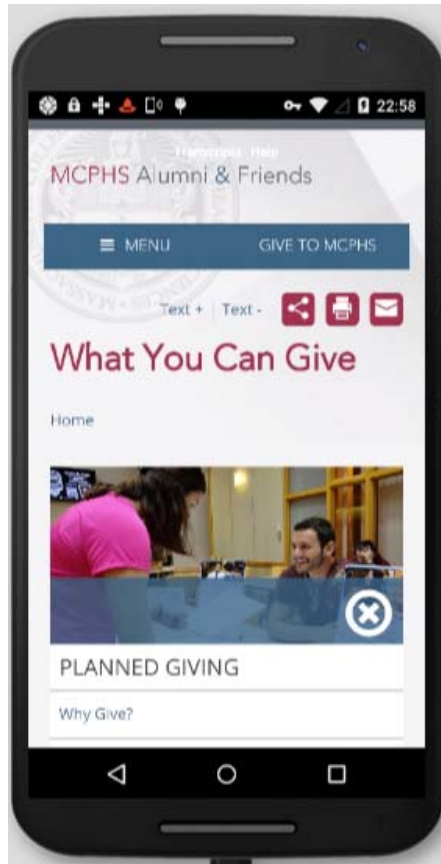


my goals.

Eat. Fly
Sleep. Swim
quack.
mate
Lay eggs
raise chicks
~~learn taekwondo~~
Build a nest.



Are Your Prospects Using Mobile?





Metrics Comes First

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





Focus On Improving Your Marketing


I should have used data to improve our planned giving marketing.



someecards
user card




Email


Choices
August 2015

Greetings from NLCS!

Welcome to the first edition of Choices, a Planned Giving newsletter! All of us at The Village at Rockville, The Village at Orchard Ridge, The Legacy at North Augusta, and National Lutheran Communities & Services (NLCS) are excited about our renewed emphasis on planned giving.

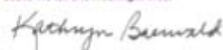


Planned Giving has played an important role in the development of NLCS throughout its 125-year history. Many individuals, including residents and family members, have remembered one of the NLCS' ministries as a part of their estate plans. For most people, including an NLCS ministry in their wills may be the best and simplest way of making a lasting impact in the lives of those we serve. For others, a trust or gift annuity may be preferable.

Every quarter, you will receive some information about the various kinds of planned gifts that are available to you. You will also hear from people who have already included an NLCS ministry in their plans and the joy that they feel from knowing that their resources will help generations of older adults to come.

We hope that you will find Choices helpful to you, your family and friends.

With gratitude for your interest in helping older adults live full and meaningful lives.



Kathryn E. Baerwald
Chief Philanthropy Officer


Talk to Us

Office of Planned Giving

☎ 540-431-2808


☎ 301-354-6422

Talking to Your Family About Estate Planning





As daunting as it may seem, there are compelling reasons to involve your family in your estate planning process. "By having a discussion with your family now, you have the opportunity to..."

How to Prepare When Meeting With an Attorney




There can be times in life where the underlying need for an attorney arises from a negative event. Estate planning is not one of those times. So how does one make the best of good situations?


[SPRING 2015]

[Home](#)
[Why Give?](#)
[Create a Legacy](#)
[How You Can Give](#)
[What You Can Give](#)



"Being the 'Thank' Student Covered Under 7 (1992-14) - 8/2015"

**Priscilla Brown Carey '74:
Giving Is Her Cornerstone**



"The future starts here!" This is what every incoming feels on move-in day and feels again four years later at Commencement. In the years in between, students forge their identities, celebrate their individuality, gain significant competencies, and discover, nurture and refine their passions.

Read more

Contact Us


Office of Gift Planning

☎ 508-286-3459

✉ Email Us


Get Your Wills Guide

Why Include Wheaton In Your Will




There is a common misconception that only the super-rich leave money to charity when they die. It's not true. The fact is that most gifts by will (bequests) are made by every type of person, from all economic backgrounds, who want to have a lasting, positive impact on their community.

How To Discuss Estate Planning With Your Family



If you have gotten to the point of deciding on how you want your assets divided once you are gone, you probably are wondering whether and/or when to talk to your family about your plans. There are compelling reasons to involve your family in your estate planning process.


Giving Today for Tomorrow
June 2015


Greetings from Bryn Mawr!

We are excited to share the inaugural issue of our gift planning newsletter with alumni of The Graduate School of Social Work and Social Research (GSSWSR).

The words below from Sharon Bishop MSS '70 highlight that there is passion and purpose behind every gift. Sharon discovered her life's purpose through her time at the GSSWSR, and has created a generous bequest.

Planning a bequest allows us to pause and consider the values and the causes that are most important to us. They are, in essence, a powerful and practical expression about our ideals — and life itself.

With warmest wishes from Bryn Mawr,




Dianne Johnson
Director, Major Gifts and Gift Planning

[The Taylor Society](#)
[How You Can Give](#)
[What You Can Give](#)

**Why I Made a Bequest:
Sharon Bishop MSS '70**

Sharon Bishop MSS '70 came to the GSSWSR on a full fellowship and a stipend from the Pennsylvania Department of Public Welfare. At the GSSWSR, she found "my career, my profession, my life's work."

After graduating from the GSSWSR, Sharon grew a consulting business focused on government social programs.



Learn how today



Performance Metrics: Email

Open Rate: Tells you how many subscribers opened your message.
(Not read or engaged)

$$\text{Open rate} = \frac{\text{Emails opened}}{\text{Emails sent} - \text{bounces}}$$



Performance Metrics: Email

Click-through Rate: Tells you how many and which links were clicked. (This measure does show engagement.)

$$\text{CTR} = \frac{\text{Clicks}}{\text{Impressions}}$$



Performance Metrics: Email

Bounce Rate: Tells you how many emails never made it to your recipients inbox.

Two types: “Hard” and “Soft.”





Performance Metrics: Email

Device Statistics: Tells you what devices your subscribers are using.





Performance Metrics: Email

Spam or Complaint Rate: Tells you how many people mark your email as spam.

$$\frac{\text{Spam Complaints}}{\text{Email Delivered}} \times 100$$



Performance Metrics: Email

Unsubscribe Rate: Tells you how many people opt out of your list.





Events





Performance Metrics: Events

Number of Attendees: Attendance is important, but make sure it grows from year to year.





Performance Metrics: Events

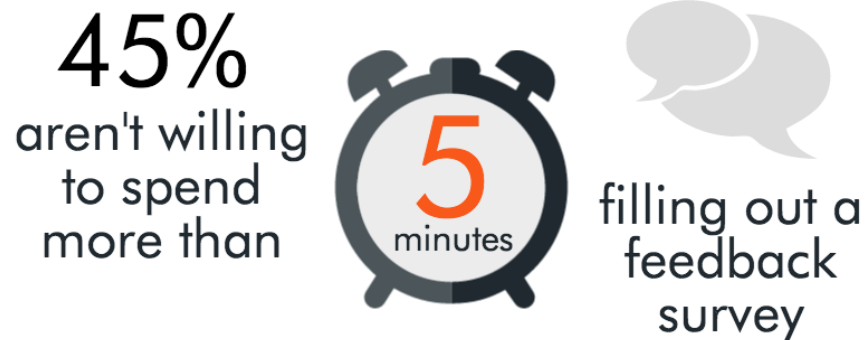
Amount Registered: It is essential to know what sources brought the most registrations.





Performance Metrics: Events

Survey Data: The feedback you receive is essential to improve future events.

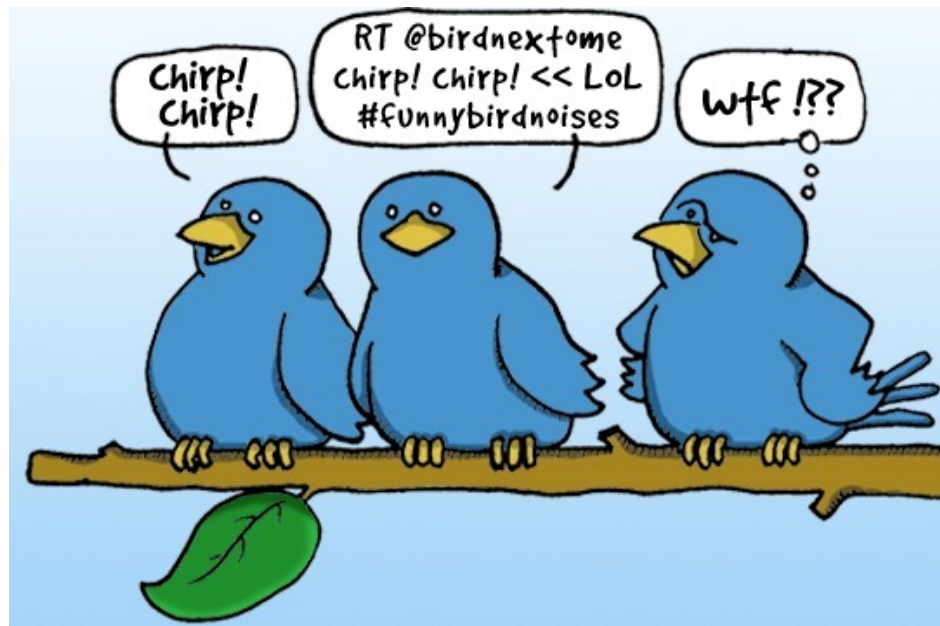


feedback habits survey 2014



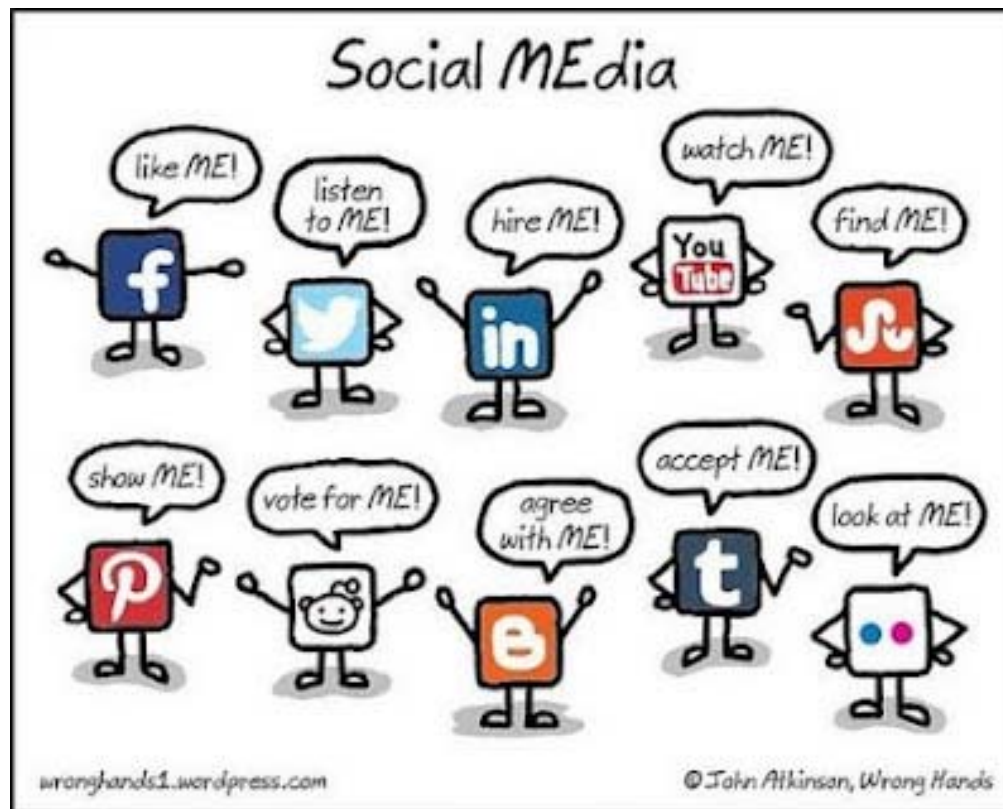
Performance Metrics: Events

Social Mentions: It's a natural fit for announcing, live reporting, and post-event postings.





Social Media





Performance Metrics: Social Media

- **Facebook:** Engagement and comments
- **Twitter:** Retweets
- **LinkedIn:** Comments, likes, and shares
- **Video Channels:** Views



Website

Do you know if your
planned giving
website is working
for you... or against
you?



someecards
user card



Performance Metrics: Website

The screenshot shows the top portion of the Brigham and Women's Hospital (BWH) website. At the top left is the BWH logo and name. To the right are input fields for 'Email Address' and 'Zip Code', and a 'GET UPDATES' button. Below this is a dark blue navigation bar with links for 'ABOUT', 'WAYS TO GIVE', 'FUNDS', 'EVENTS', and 'CONTACT', along with a 'DONATE' button and a search bar. The main content area features a large blue heading 'What Will Your Legacy Be?' and a photograph of a classical building with columns. To the right of the photo is a vertical list of menu items: 'GIFT PLANNING HOME', 'WHY GIVE?', 'CREATE YOUR LEGACY', 'LEGACY SOCIETY', 'HOW YOU CAN GIVE', 'WHAT YOU CAN GIVE', 'FOR ADVISORS', and 'CONTACT US'. Below the photo, there is a paragraph of text: 'What do you want your legacy to be? With a planned gift, it can be the catalyst for life-giving breakthroughs that will benefit generations for years to come.' followed by another paragraph: 'At Brigham and Women's Hospital (BWH) and Brigham and Women's Faulkner Hospital (BWFH), we are dedicated to delivering life-giving breakthroughs. We are inspired by our patients' courage, our caregivers' compassion, and our scientists' curiosity—all fueled by our donors' generosity.'



Performance Metrics: Website

Getting Started



Many planned gifts don't affect your existing financial resources but have a significant impact on BWH and BWFH. Give to the institution you care so much about, while maintaining control and flexibility. This includes:

- Giving through your estate
- Giving with tax benefits
- Giving while generating income

[Learn How You Can Give >](#)

Make a Bequest



A bequest is a gift provision in your will or revocable living trust. All assets, including cash, securities, real estate, and tangible personal property, may be transferred to BWH or BWFH at the end of your life. Bequest are made as a:

- Gift of a percentage of your estate
- Gift of a specific dollar amount or asset
- Gift from the balance of your estate

[Learn About Bequests >](#)

[Bequest Language >](#)

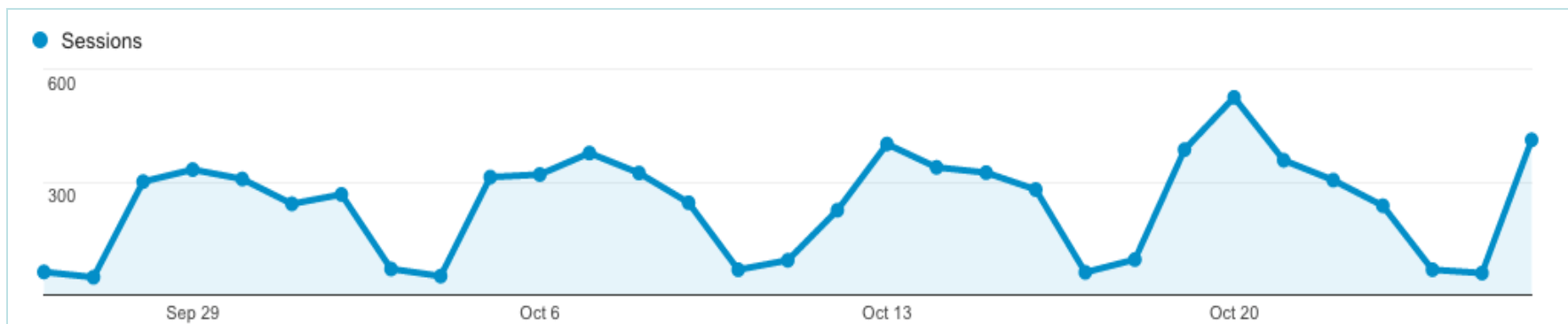
[Our Office of Gift Planning >](#)

[Call 617-424-4326](#)



Performance Metrics: Website

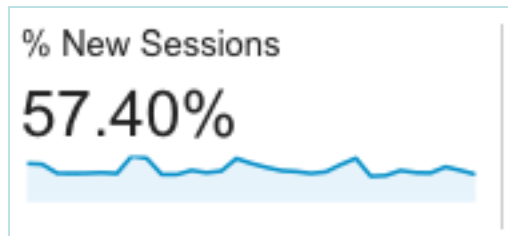
Sessions: These are the number of visits to your site



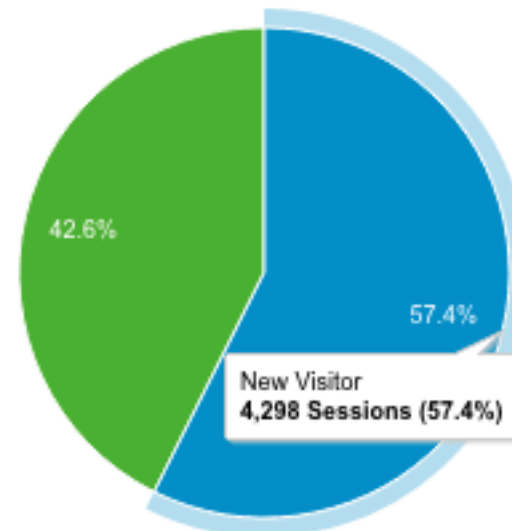


Performance Metrics: Website

New Sessions: These are the new visitors to your site.



■ New Visitor ■ Returning Visitor

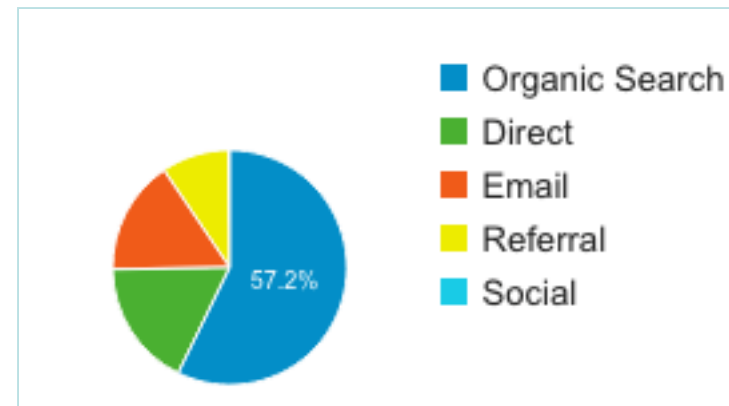




Performance Metrics: Website

Traffic Sources: Shows you the channels that are driving your traffic.

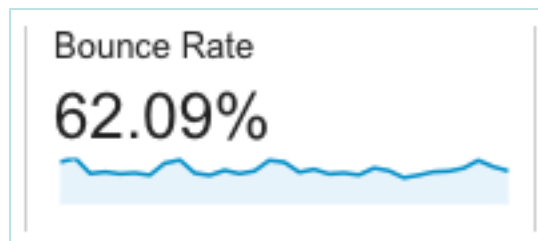
- Organic Search
- Referral
- Direct
- Social





Performance Metrics: Website

Bounce Rate: Shows you what percentage of visitors leave your website without clicking forward.





Performance Metrics: Website

Exit Pages: An “exit” is when a user visits multiple pages and then leaves your site.





Performance Metrics: Website

Top Traffic Pages: Shows you most popular content pages.

1.	/		3,498 (64.41%)
2.	/designate		229 (4.22%)
3.	/how-you-can-give		191 (3.52%)
4.	/what-you-can-give		156 (2.87%)



Performance Metrics: Website

Conversions. This shows the number of phone calls, emails or submitted web forms.





Direct Mail

The purpose of our direct mail is to build planned giving awareness and discover existing bequest intentions.

someecards
user card





Performance Metrics: Direct Mail

Response Rate: How many prospects do what you've asked them to do in the mailer.

$$= \frac{\text{total responses}}{\text{total mailers sent}} \times 100$$

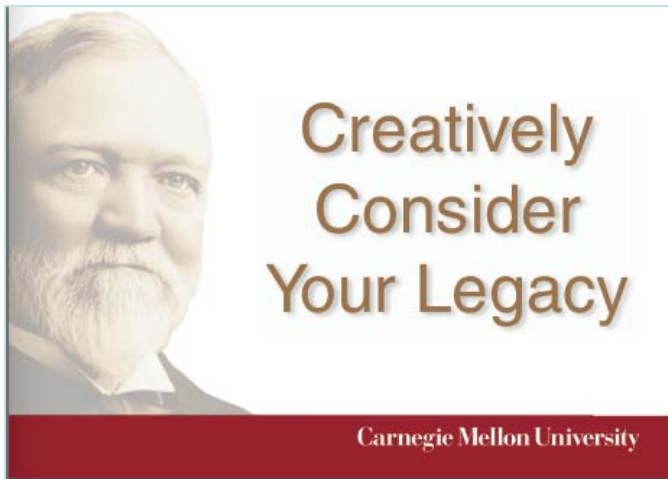


Performance Metrics: Direct Mail





Performance Metrics: Direct Mail



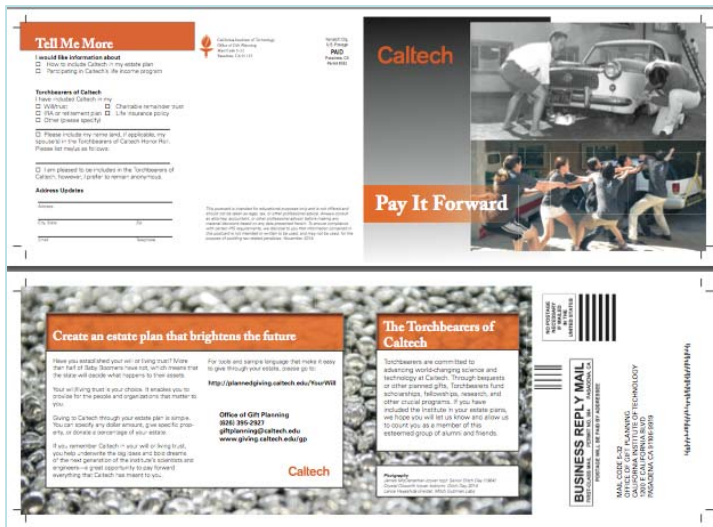
➤ To learn more about estate planning and creating a will, visit giftplanning.cmu.edu/YourWill.



Please contact:
Office of Gift Planning
for personal assistance
at 412.268.5346
or askjoebull@andrew.cmu.edu.



Performance Metrics: Direct Mail



Tell Me More

I would like information about

- How to include Caltech in my estate plan
- Participating in Caltech's life income program

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

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



Performance Metrics: Direct Mail

The screenshot shows the Caltech website's 'A Gift By Will' page. At the top, there is a navigation bar with links for 'VISIT', 'APPLY', 'GIVE', 'DIRECTORY', and 'ACCESS'. A search bar contains the text 'What are you interested in?'. Below the navigation bar are links for 'About Caltech', 'News & Events', 'Research & Education', and 'Join Us'. The main content area features a 'GIFT PLANNING' sidebar with links to 'Ways You Can Give', 'What You Can Give', 'Donor and Adviser Resources', 'Torchbearers Legacy Society', and 'Contact Us'. The main article is titled 'A Gift By Will' and includes a 'Home' breadcrumb. The text explains that a gift by will or living trust is an easy gift to make and provides information for those who do not have one. It also includes a section titled 'Paying It Forward' with an image of people holding hands. At the bottom of the article, it says 'Ways you can define a charitable gift in your estate plan'.



Performance Metrics: Direct Mail

Have you given to Caltech?

Please let us know if you have included Caltech in your estate plans. We would welcome the opportunity to thank you for your thoughtful gift.

If you would like more information about gifts by will to Caltech or questions on giving through your estate plan, please fill out the form below:

First Name *

Last Name *

Email *

Phone

Class Year

Submit



Email Our Office of Gift Planning »



Call (626)-395-2927



Performance Metrics: Direct Mail

It's about response and building awareness.

$$= \frac{\text{total responses}}{\text{total mailers sent}} \times 100$$



Performance Metrics: Direct Mail

Constant Cultivation





Conclusion

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.



Questions?





Still Have a Question?

Contact: Andrew Palmer,
Director of Marketing Services

E-mail: apalmer@pgcalc.com