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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



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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

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Planned Giving Marketing

An Educated Donor is our Best Donor.



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Find Your Return On Investment


Your marketing plan is an investment.



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ROI Is Your Friend



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A Simple Formula

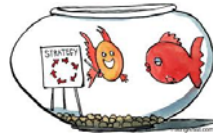
$$\text{ROI (\%)} = \frac{\text{Net Program Benefits}}{\text{Program Costs}} \times 100$$

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A Revenue Center, Not A Cost Center

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



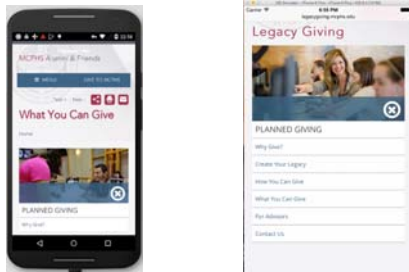


Setting Goals And Targets






Are Your Prospects Using Mobile?



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Metrics Comes First


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



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Focus On Improving Your Marketing




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Email



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Performance Metrics: Email

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

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

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Performance Metrics: Email

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

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


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Performance Metrics: Email

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

Two types: "Hard" and "Soft."




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Performance Metrics: Email

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



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Performance Metrics: Email

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


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

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Performance Metrics: Email


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



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Events



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Performance Metrics: Events

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




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Performance Metrics: Events

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



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Performance Metrics: Events

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

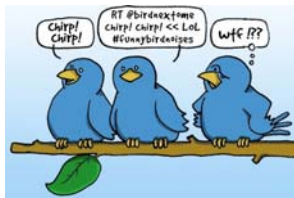


feedback habits survey 2014



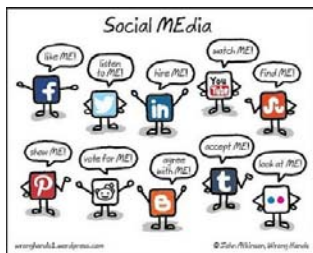
Performance Metrics: Events


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





Social Media



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Performance Metrics: Social Media

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

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Website

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




someecards
someday-card

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Performance Metrics: Website



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Performance Metrics: Website

Getting Started



Many planned gifts don't affect your existing financial resources but have a significant impact on BRRT and BRRTA. 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 BRRT or BRRTA at the end of your life. Bequests are made as a:

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

Learn About Bequests >
Bequest Language >


Our Office of GRT Planning | Call 617-424-4336

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Performance Metrics: Website

Sessions: These are the number of visits to your site



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Performance Metrics: Website

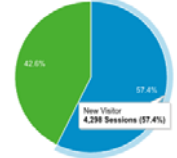
New Sessions: These are the new visitors to your site.

% New Sessions

57.40%



■ New Visitor ■ Returning Visitor



New Visitor
4,299 Sessions (57.4%)

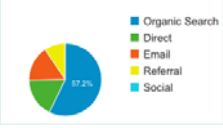
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Performance Metrics: Website

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

- Organic Search
- Referral
- Direct
- Social





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Performance Metrics: Website

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





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Performance Metrics: Website

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



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Performance Metrics: Website

Top Traffic Pages: Shows you most popular content pages.


1.	/	3,408	(68.41%)
2.	/designate	229	(4.22%)
3.	/how-you-can-give	191	(3.52%)
4.	/what-you-can-give	156	(2.87%)

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Performance Metrics: Website

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



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Direct Mail

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



somercards.com
user card

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Performance Metrics: Direct Mail



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

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

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Performance Metrics: Direct Mail






= HIGHER RESPONSE

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Performance Metrics: Direct Mail



Creatively Consider Your Legacy

Carnegie Mellon University

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

Carnegie Mellon University

Please contact:
Office of Gift Planning
for personal assistance
at 412.258.5346
or askjoebull@andrew.cmu.edu.

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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>

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Performance Metrics: Direct Mail



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A Gift By Will

What You Can Give

What You Can't Give

Charitable Deduction

Charitable Remainder

Trusts

Transferring Liquidity

Bequests

Contact Us

A gift by will or living trust, also known as bequest, is one of the easiest gifts to make. You can leave it in any dollar amount, gift specific property or designate a percentage of your estate. But what if you don't have one? Don't worry you are not alone. Most Americans don't have a will.

If you do without a will or living trust, the rest of your estate will devolve from your estate to default law. Typically, this means your estate will be divided up among your closest surviving family members according to a formula, and none of your estate will go to Caltech or any other charity. If you want to leave a leg in how your estate is distributed, you must have a will. We encourage you to work with an experienced attorney to create a will that accomplishes your goals for your estate.

When you can define a charitable gift in your estate plan.

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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

✉ Email Our Office of Gift Planning ☎ Call 8310-395-2387

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Performance Metrics: Direct Mail

It's about response and building awareness.


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

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Performance Metrics: Direct Mail

Constant Cultivation



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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.

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Questions?



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Still Have a Question?

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E-mail: apalmer@pgcalc.com

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