



MARKETING



It is fair to say that marketing comprises at least 50% of the work of building and sustaining a planned giving program. A great place to start is to look for ways you can add planned giving information to your current efforts. An effective marketing plan should educate about the basic ways donors can include philanthropy in their estate plans, while also highlighting the powerful impact these gifts can have in furthering the organization's mission. The most effective marketing efforts for encouraging planned gifts include a slow drip of stories and information released consistently over time. By gauging reactions to these small stories you can build an understanding of what resonates with your prospects and allow for consistent, nuanced messaging.

Incorporating Planned Giving

Once a Board has approved efforts to begin soliciting and accepting planned gifts, a planned giving program can be integrated into existing marketing. Start with updating your website to add a page about gifts by will and trust, and beneficiary designations. As your program grows, you can add additional topics and information. Spend some time looking at planned giving web pages for other organizations to decide on the content, tone, and layout that feels like the best fit for your audience. Be sure to include contact information for the person who will serve as the primary contact for answering questions about planned gifts. (see Leave 10 content example in section [Resources](#))

It is important to utilize all channels to reach donors. Examine your organizations social media channels and

use them to inform about planned giving and drive traffic to your new web page. Also consider including an article or ad about your newly launched planned giving group in newsletters (print or digital) and eblasts. You can integrate planned giving into your annual appeals by adding a check box on every reply mechanism, whether print or digital. This will encourage your legacy donors to self-identify (so you can thank and steward them), as well as build awareness about your program. For example, one checkbox might read, "Yes, I've already included a gift to (organization) in my estate plans." The other checkbox might read, "Please send me information about gifts by will and the (organization's) legacy society."

An excellent way to steward your donors as well as inspire others is to find a one or more donors who have confirmed future gifts to your organization and ask if they would be willing to be featured in a donor story to help encourage others to make similar gifts. Include a photo, if possible, and interview the donor to learn more about them and their reasons for giving. Your donor story should also describe the impact their gift will have on your organization's mission and how that impact makes the donor feel. According to research, donor stories are the most effective means for marketing gift planning. Donors begin to see themselves in the stories of others, so it is important to feature as many different donors as you can – single, married, grandparents, older, younger, BIPOC, LGBTQ, etc.

If you haven't yet heard of Dr. Russell James, we recommend learning about his research on planned giving donors – including what goes on in their brains! (see section [Resources](#) for a brief article highlighting his work and a link to free materials). As you are creating all of your marketing materials, you will want to keep Dr. James' research in mind and his finding that familiar, simple language is the most effective. It is best to avoid legal and technical terms to the extent possible. You should be sending the message that it is easy and rewarding to plan for a future gift to your organization.

There are many third-party companies specializing in marketing and communications specifically for planned giving programs. Some companies are full service and offer everything from customized webpage design, to training and print materials in a comprehensive pack-





age. Others offer services a la carte, like producing a gift planning newsletter, writing donor stories, or conducting a donor survey. If your organization has the budget, using a marketing company to boost your organization's efforts may be a very practical option. (see vendor list in Building Your Resources – [Resources List](#))

Don't be discouraged if your marketing efforts don't result in a tidal wave of new donors right away. The conventional wisdom is that it typically takes about three to five years to fully realize the benefits of a sustained marketing effort for a new program. The key is to stay the course and be consistent in finding ways to regularly remind your constituents that your organization is knowledgeable about accepting estate gifts, continue to provide good stewardship to those who have made a commitment, and always be on the lookout for donor stories to share.

Segmentation & Finding Prospects

If your organization has a large database full of friends and donors, or if you have additional staff time and expertise to dedicate to marketing for planned giving, you can further refine your marketing efforts to include segmentation and testing of various marketing messages and images. This means that you send different, or slightly different messages, to different groups within your database to learn what elicits the best response. For example, your newsletter content, donor stories and program/event offerings to those ages 45 to 65, might be slightly different than those offered to constituents over age 65. Another approach would be to tailor a message to donors who support a specific program area. Remember that you want donors to see themselves in your messaging. This can be accomplished by simply swapping out the photos used in a particular piece to speak to different groups.

Ideally, you will be able to review and track analytics from your communications, so that when different images and messages are tested you can determine which ones get the best response or highest open rate, and use that information to plan future marketing efforts. Once your list of legacy donors starts to grow, you can start developing some general profiles, or personas, for who they are, which can also help you to better target your marketing to others in your database who may be similar.

If your organization has donors that are giving via a donor advised fund (DAF) or qualified charitable distributions from an IRA, they might also be great planned giving prospects – specifically for a beneficiary designation on their DAF or IRA. Make sure they are receiving your planned giving marketing and follow up with a meeting request to talk in person. A few other cues that may help you identify your best legacy donor prospects include your most loyal, long-time donors and volunteers, donors over age 65, and any donors without children. Conducting a broad donor survey every few years is a great way to invite valuable feedback from your donors, and it is also an opportunity to uncover previously unknown legacy donors and prospects if you include similar questions to the “checkboxes” described above. This also applies to any campaign feasibility studies conducted with your donors. Get creative and always be looking for ways to get your planned giving message to the donors who are ready to hear it.

If marketing is 50% of a solid planned giving program, the other 50% will be following up with your leads and best prospects by phone, email, video-chat, and in person to discuss and eventually confirm their future gift intentions.



MARKETING RESOURCES

Samples:

- [Leave 10 website content](#)

More Information:

- [Research on Planned Giving Donors](#) from Dr. Russell James
- Dr. Russell James [Free Materials: Training & Fundraising Strategies](#)

