

Communication Strategies in Planned Giving

Doug McDaniel JD, CFRE
The Salvation Army Eastern Territory
440 West Nyack Road, West Nyack, NY 10994
845-620-7319,
douglas_mcdaniel@use.salvationarmy.org

Communicating Planned Giving:

"It is all about Communication"----Well,
a good bit of it is about
communication, especially
communication where you keep your
wits about you

Communicating Planned Giving:

- To whom

 - What

 - How

 - By whom
-

Communicating Planned Giving:

To whom

What

How

By whom

Communications—to whom

Everybody

Targeted Groups

Individuals

True Insiders

PG Messages for "Everybody"

The public, constituents, donors

Every message carrier of the organization (and then some) should be considered a possible opportunity

Expansive approach—be fearless

Broad based approach at little or no out of pocket cost

Targeted Group Messages

- ❑ Delivered to defined cohorts of constituents
- ❑ Attempt to achieve one-to-one marketing by mass delivery

Personal PG Communications

- ❑ One on One
- ❑ Face to Face

Planning with True Insiders

- ❑ True Insiders—live and breathe your organization—high levels of involvement and investment
- ❑ Planning, facilitating, inspiring, Imagineering vs. selling

Communicating Planned Giving:

To whom

What

How

By whom

Key PG Messages

Benefits (including offers)

Solutions

Impact

Examples

Testimonials

Case for support and future focus

Key Objective: Mass and targeted communications

Elicit "tell me more" responses immediately

Set the stage for future prospect inquiries

Motivate prospects to self identify

Make an offer of a benefit to be asked for, responded to

Key PG Messages

- Cohort specific
 - Person specific
 - Defined and strategic
 - Personal
-

Communicating Planned Giving:

- To whom
 - What
 - How**
 - By whom
-

PG Message Delivery Modes

- Mass communications, media
 - Cohort specific preferred modes
 - One on One
 - Face to Face
-

Communicating Planned Giving:

- To whom
- What
- How
- By whom**

Who delivers the message

- Beyond mass and targeted materials
 - Staff
 - PG Specialist
 - Development Staff
 - Others???
 - Leadership
 - Volunteers
- (Driven by relationships, roles, and capabilities)

Targeted Groups

- Organizational and structural groups and stratifications
- Reunion classes
 - Specific program participants
 - Employees
 - Auxiliaries
 - Former beneficiaries
- (Defined constituencies particular to the organization)

Targeted Groups

Defined by analytics

- Age
 - Marital/family status
 - Participation History
 - Giving History
 - Wealth
 - Asset ownership
-

Age

- Age overlay purchase
 - Organizational records
 - Length of time on the file
 - First name: Herbert vs. Trent, Violet vs. Jennifer
 - Type of residence (e.g. senior facility)
-

Marital/family status

- Salutation field "Miss"
- Organizational records
- Survey data

No known source of purchase—"absence of children in household" generally not useful

Participation History

- Often not in organizational databases but in programmatic records that are not maintained
- Event attendees, beneficiaries, volunteers, parents/children
- Surveys
- Reunions

Giving History

- Length of time on the file
- Frequency/number of gifts
- Current vs. lapsed
- Gift type—cash vs. stock
- Cumulative giving
- Gift size

Wealth/Asset ownership

- File overlays—purchased information
- Overall wealth
- Income producing assets
- Affluent zip codes
- Multiple real estate owners
- Boats, planes, etc.

Indexing and modeling

- Indexing—assigning values to known favored characteristics to yield scores and appending to constituent files
- Modeling—establishing characteristics of a baseline group (e.g. existing annuity donors) and searching constituent files for similar matches

Individual Communications

Mass market and targeted constituents become individuals as soon as they respond!

Individuals—Reactive Responses

- Be ready to deliver any benefit or offer your communications have indicated
- Be ready to respond to any inquiry however generated, or completely unprompted
- Have systems that insure that inquiries, referrals, etc. get to you

Individuals—Reactive Responses

- Provide service
- Provide service through understanding what the prospect is seeking to do—Ask!
- Responding to a prospect inquiry or request driven by your offer is not a perfunctory fulfillment function

(Reactive response morphs into proactivity)

Individuals—Reactive Responses

Whoops! The prospect doesn't know about your service and assistance intent.

- Why are you calling/writing? In response to their inquiry.
- This is what you do—help prospects get their information.
- What is the benefit to the prospect to communicate further with you?

Individuals—Reactive Responses

What is the prospect trying to fix, avoid, or achieve?

You will be communicating in an under informed situation until you gain more information.

Your objectives will always be to thank and cultivate but also to research and to seek further connection (Your agenda)

Individuals—Reactive Responses

You start pursuing **your agenda** with the first personal connection

Researching by asking questions and listening

Cultivating

Seeking commitment to something that will move the process forward

Individuals—Reactive Responses

Typical commitment sought:

- Appointment
- Opportunity to review further
- Willingness to share reaction
- Some kind of further connection

Individuals—Proactive Actions

Whoops!

Your donors and prospects are not raising their hands, not responding to mass and targeted communications, and don't know of the benefits you can provide.

What'll we do now?

Individuals—Proactive Actions

- Send info and call to follow up
- Call to deliver a message
- Drop in/drop by
(Low yield approaches)

- Get an introduction
- Talk to prospects you know!

Individuals—Face to Face

We're talking, but not about planned giving. How do I bring this up?????

1. You have been so (faithful)—have you considered remembering us in your estate plans.
2. I always ask people if they have a will and is it up to date.

Individuals—Face to face

3. Now that _____, I thought it was time that _____.
(Credit: Dan Sullivan and Arlene Sullivan, SLPGC.)
4. If I could show you _____, would you be interested?
5. We are hoping that committed (supporters) will consider supporting us in three ways—annual, special, and via their estates.
6. We have made a strategic decision to concentrate on _____. Can we review this?

Individuals—Face to face

7. I bet I can show you _____.
8. One of the things I have found is _____.
9. What I often do is _____.
10. What I do for the organization is _____.
11. _____ asked me to make sure I talk to you about _____.
12. I'm following up with those who _____.

Individuals—Face to face

Whoops!! The prospect rebuffs your approach.

1. "Thank you for your candor." Perhaps we can explore this another time. Or, _____.
2. Feel, felt, found.
3. Unlike some others, we are not "selling" anything. What we are doing is _____.
4. Tell me about your family (In response to: "its all going to my family.")
5. I can appreciate that—one of the reasons we talk to people like you is that they and their advisors sometimes haven't considered _____.
6. We never try to replace your own advisors—but we can usually provide very helpful supplemental information that will _____.

Individuals—Face to face

Whoops!! The process is getting bogged down.

1. To make this happen we need to do A, B, and C. (I can do A as you do B.)
2. The next step is _____.
3. Could I _____.
4. Will you _____? Would you be willing to _____.
5. Sometimes my job is to be a "squeaky wheel."
6. Let's refocus on _____ (tied to the prospects goals.)

Individuals—True Insiders

The case for support and future of the organization, its plans and aspirations, the impact it will have on society, and its congruence with the shared values of the donor become central to the conversation. It is still about benefits but these are the benefits.

Communicating Planned Giving

“Communicate with your wits about you.”

“More planned gifts are lost due to lack of assertiveness than due to over aggression.”

Communicating Planned Giving

The right word at the right time is like precious gold set in silver. Proverbs 25:11 (CEV)

Whoever delivers your message can make things better or worse for you. Proverbs 13:17 (CEV)
