

The Marketing Plan

1) UTILIZING YOUR OWN EXISTING RESOURCES

Make a complete inventory of all of the publications/correspondence [your organization] sends out – **electronic and print**. Examples might include:

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- a) Alumni Journal, etc.
- b) Development Newsletters
- c) General Newsletters
- d) Any sort of bulletin
- e) Program Booklets
- f) Institutional mass emails / e-broadcasts

2) PLANNED GIVING WEBSITE

If you have not done so already, develop a donor-centric planned giving website that engages your readers and actively leads them to you for follow-up. If you don't have one and want a customizable, integrated planned giving website, call us, we have a solution for you.

Features should include:

- Donor centric-content
- Donor-stories
- Basic Gift descriptions with simple flow charts
- Interactive tools
- Weekly rotating tips

Calculators are not that important unless you focus heavily on gift annuities and other complex planned gifts.

3) COLUMNS AND ARTICLES

In any of your institutional **print publications** (newsletters, bulletins, magazines), place an interesting column/article (we have plenty to choose from if you don't have the time to write one yourself... besides, it's not a good use of your time). Make sure you include your planned giving website URL in the contact information associated with your article. An all-time popular favorite article is *Don't Worry. You Don't Need a Will. The Government Will Take Care of It for You.*

4) DISPLAY ADS

Develop a series of display ads (similar to a magazine ad). Place them in your organization's publications, in commercial publications (if appropriate), and even in packets of take-away material you hand out about your program. Be sure these ads mention your website as a convenient source of

donor-centered information. We can also prepare the ad for you. (It is ok to place the same ad over and over, perhaps changing only the donor story you include.)

5) **eBROADCASTS**

Utilize your existing institutional e-broadcasts (the ones your organization sends out) by placing a compelling link to content on your planned giving site or a landing page. Make it bold and striking. For example, the link could simply be the title of an article (*Don't worry. You don't need a will. The government will take care of it for you.*) or a simple elevator pitch (*Did you know you can receive guaranteed income for life?*), or the title of any one of our documents we can make available for you.

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As another option, we can create landing pages for you with personalized URLs with metrics you can view at your convenience.

6) **DATAMINE YOUR BEST PROSPECTS**

Select your best prospects. Do not use wealth and age as your primary selection criteria. Your best predictor is loyalty, i.e. donors who give consistently (regardless of amount). Are you mailing to too many prospects or too few? Rule of thumb if you do not use an outside professional service: choose donors who have given 8 out of the last 15 years, regardless of amount. These folks want to make you part of their family. Use this list for solicitation letters, postcards, newsletters and any type of outreach.

7) **US MAIL / SOLICITATION LETTERS**

Send your prospects a personalized letter highlighting how giving wisely benefits both donor and non-profit. Include your phone, e-mail, and website URL. We can provide a letter you can customize. Mail this same letter or slightly varied versions of it three to four times a year. Why the same one? Because chances are only 10-20% of your letters will get read, and less than 5% of those who read them will remember your message 1 month later. Remember the value of repetition. Good marketing means *you maximize the number of "touches" you make in one year.*

For letters, be sure that the letter is personalized to get your recipients' attention. Use a **handwritten or lasered address (no labels)** and a real **live stamp** rather than metered postage.

8) **EMAIL SIGNATURE LINES**

A typical email signature line such as "Visit us at the Foundation" will never get clicked. Use our compelling email signature lines (or write your own) and make sure everyone in your office uses them in their email correspondence. Place these lines (we call them "elevator pitches") between your name and address, not way below your address. Have each line link to a specific page on your planned giving website or a landing page we can create for you. Get creative with these lines and

have some fun:

- Make a gift that costs nothing during your lifetime.
- Giving stock could be more beneficial than giving cash.
- You can donate your home, get a deduction, and continue to live there.
- Make a gift and receive guaranteed income for life.

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Again, remember to hyperlink them! Our *Pocket Guide* has plenty more ideas for your elevator pitches... make sure you get your free copy.

Signature line example:

John Doe

Make a gift that costs nothing during your lifetime!

Director of Development

800-490-7090

Valley Forge, Pennsylvania

9) "AUDIO" SIGNATURE LINE

Just like your email signature line, your voicemail is another hot spot to insert donor-friendly planned giving messaging. Just think about how many people will hear that message every day, every week, every month. This advice may at first sound unusual, but it is actually used by several of our clients. Here's a typical voicemail:

"Hi! This is JT. To skip this message and record yours, press # now. Did you know you can make a gift and receive guaranteed income for life? It's true! And some of it is even tax free. Call me at 800-490-7090 and I will tell you more."

10) POSTCARDS FOR LEAD GENERATION

Postcards are concise, streamlined, attractive: they're a welcome, 30-second read. In direct mail, they have a much higher readership and retention rate than planned giving newsletters.

11) NEWSLETTERS

The only newsletter we recommend is a donor recognition newsletter mailed out in January.

12) THE HERITAGE SOCIETY

We suggest a beautifully designed, elegant and timeless brochure with a long shelf-life. Invest the money now and have it last for several years. Have an insert in the back that can be updated with members' names; copy the same list to your planned giving website. *Something that we'll do for you.*

13) THE LEGACY SOCIETY

Perhaps you have a Society with a name? Perhaps you have a few members. You don't need any members to establish your Legacy Society, in fact, it would be better if you had one that might attract those who have already remembered you in their estate plan. Introduce your Society and send your Statement of Estate Intent. You may discover new gifts and you can thank these newest members of your planned giving donor family for their commitments right away!

Too often Legacy Societies are treated like lunch at the nursing home. Events are tired and boring, attendance is sparse and your most loyal donors leave feeling blah. Why not choose an event where they can bring their grandchildren and spend time with them? Go to a local attraction that they will enjoy but might not have seen, spice it up! Our older generation is healthier and busier than ever before.

Easy steps to establish your Legacy Society:

1. Choose a name, make it something that has tradition and meaning for your non-profit and its history, tradition and those you serve.
2. Use the documents that come with this packet to send a letter to your most loyal prospects asking them if they have already remembered you in their plans or if they would like to have a discussion about how to leave a legacy at [your organization].
3. Put together a welcome packet for new members including:
 - A letter thanking them for being a part of your legacy society and investing in the future of your mission, signed by your organization's leader.
 - A small token or symbol for them to keep, such as a lapel pin with your logo on it and a car magnet with a meaningful organizational quote or logo.
 - A calendar of the year's Legacy Society and important (fun) event.
 - A hand-written note from the person with whom they have the closest relationship at your organization.
4. Choose a public place for a plaque at your headquarters and create a legacy wall. If you would like ideas and vendors, please call us, we have some affordable and elegant options for you.
5. Plan interesting events to show your appreciation for these important gifts. Don't forget to invite planned giving prospects to at least one Legacy Society event each year to inspire them to join!

Marketing Calendar

The following calendar (next page) gives you an idea of your marketing plan. You can begin at any month and continue it for 12 months.

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- The dates planned on the calendar are the dates your donors receive the materials. So plan accordingly.
- All of the services marked can be provided by PlannedGiving.Com.
- Note: Each postcard mailing focuses on one gift plan at a time, **however, it summarizes all of the other popular gift plans as well** (usually a side column).



Did you know we have **3** versions of the Pocket Guide?

PlannedGiving.Com/guide

Month	Website	Postcards	Letters	eBroadcasts	Display Ads
January	Develop a planned giving website that is on 24/7.		Educational "solicitation" letter about planned giving options.		Develop a display ad and run it multiple times.
February		Postcard 1: Bequests and Estate Planning (Option: implement Valentine's		eBroadcast 1	
March			Thank them for their support.		
April		Postcard 2: Giving through retirement plans		eBroadcast 2	
May					
June		Postcard 3: Beneficiary Designations		eBroadcast 3	
July			Introduce / remind/invite them to a Legacy Society event.		
August				eBroadcast 4	
September		Postcard 4: Appreciated Assets and Year End			
October			Impact of planned gifts?		
November		Postcard 5: Thanksgiving postcard (thank your donors)		eBroadcast 5	
December		Postcard 6: Year End (early December)			

EXPENSE TRACKER

Whether you're working with us or another vendor, here's a useful form.

Product / Service / Venue [GENERAL]	Investment
Planned Giving Website	
Solicitation Letters (don't forget US Postage) Solicitation letters will require copywriting, word processing, developing an insert with a response envelope. You should take into account stationery costs as well. It is recommended that you do not	
Direct Mail We advise mailing postcards. We suggest 6 cards a year. We'll need a number from your database to give you an estimate.	
Display Ads 2 ads; repeat them over and over changing only the donor story you share.	
Media Consider local media if it is suitable for your organization (radio; billboards, newspaper ads, other local papers)	
Legacy Society Events Lunches, board meetings, general events, gold outings, etc.	
Donor Visits Lunch, Dinner, Travel, Lodging	



A MAGAZINE FOR FUNDRAISERS WHO "GET" IT.

Marketing Tips and Leadership Strategies
Delivered Straight to Your Mailbox Every Month

Plannedgiving.com/gt
800-490-7090