



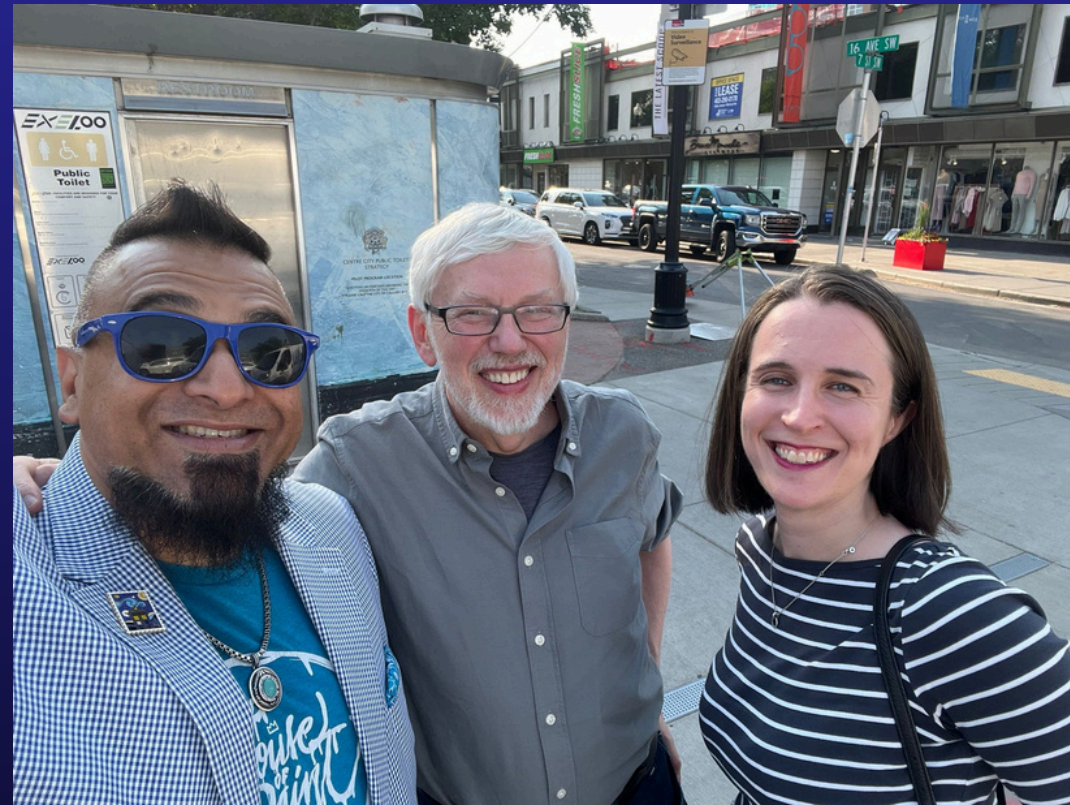
Legacy Giving for the Rest of Us

Let's create powerful estate giving journeys

With Tess Conrad CFRE
Founder & Principal Consultant
Full Potential Fundraising



A little bit about me

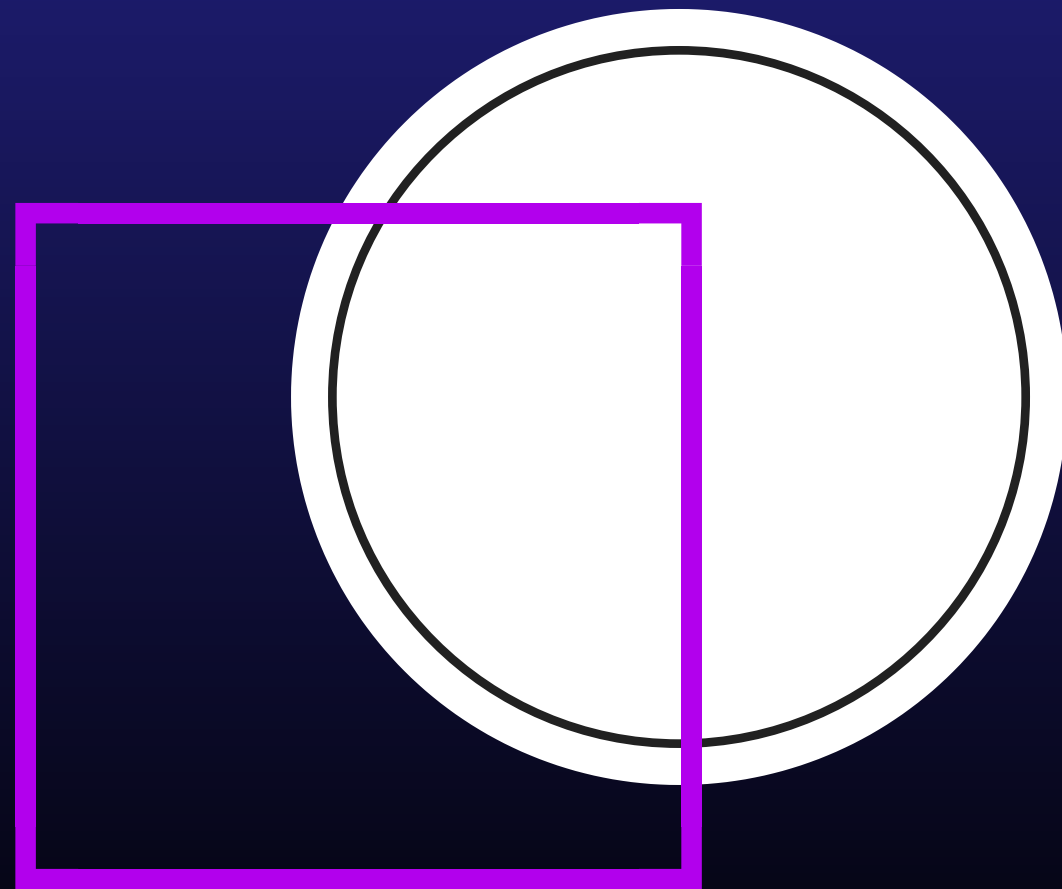


Let's talk gifts-in-Wills!

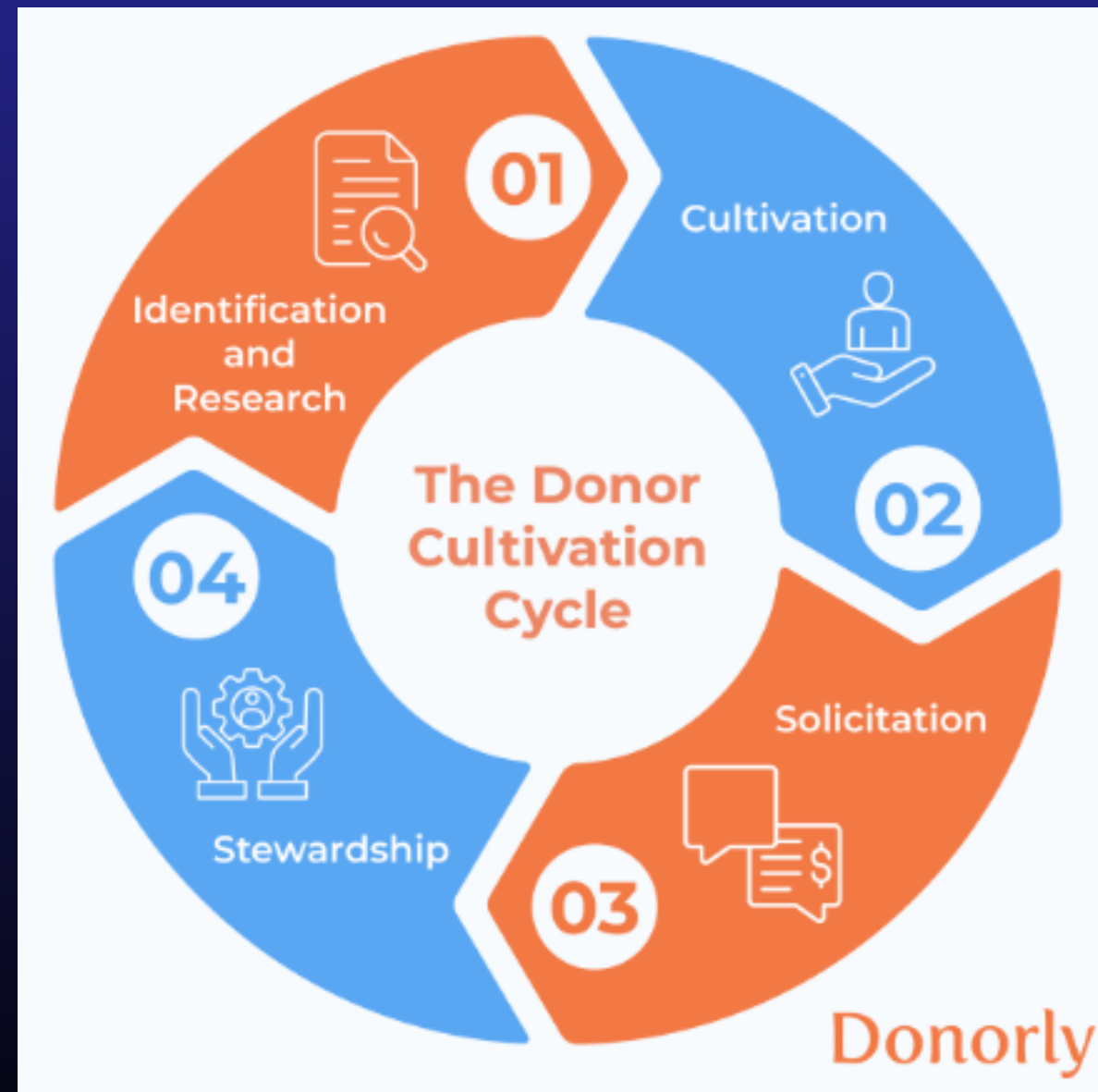
- Do you have a gifts-in-Wills fundraising program?
- Do you feel good about it?



**Planned Giving programs are
weakened by the wrong
mindset.**



Traditional donor cycles don't fit!





Let's do something different.

The Estate Gift Donor Cycle

 **Fundraising Foundations**
A well-run Individual Giving program with many repeat donors

Start a Planned Giving program

Reach out to loyal donors

Cultivation
Foster awareness and interest in estate giving


Acquisition
Invite potential donors to consider a gift in their will


Donors express interest

Donors write a gift in their will

 **Lifelong Stewardship**
Regularly connecting with Planned Giving donors, regardless of annual gifts

Fundraising Foundations Part 1:

- **Gift-in-Will donors aren't "out there". They are your loyal donors & volunteers.**
- **If you have less than 250 loyal donors, focus your time and resources on building your annual & major gifts programs before heavily investing in gifts-in-Wills.**



An investment too early

- Never did a year-end campaign.
- Less than 100 donors.
- Some program alumni.
- Thousands spent on a survey project and minimal results.



Fundraising Foundations Part 2

Planned Giving “program architecture”!

You need **SYSTEMS** to make Planned Giving work well:

- Database tracking and reporting
- KPIs
- Automations
- SOPs
- Estate administration Processes
- A strategy

Minimum: A way to track your pipeline (i.e. “handraisers”) and a 12-month plan.

Fundraising Foundations Part 2

Signs you don't have the right Planned Giving program architecture:

- **Planned Giving donors and prospects are getting lost.**
- **You don't have a plan to consistently cultivate your Planned Giving pipeline.**
- **You don't know how to accept complex gifts - or to administer an estate gift.**
- **You're overwhelmed with 1:1 donor connections.**

The Case of the Phantom Hand-Raisers

*Why accurate data matters more than
meeting arbitrary goals.*



Let's Talk Data & KPIs

Definitions for today:

Hand-raisers

- Expectancy/ Pledger
- Intending
- Prospect/ Enquirer
- Not Now

Have these in reportable fields in your database!



The Truth About KPIs

The Truth About KPIs

Estate Gifts are about relationships.

You have to trust the process.

...But that doesn't mean you can't assess your program's performance!

Some metrics

- Hand-raisers and “movement” in the pipeline.
- Are hand-raisers followed up with within 1-2 business days?
- Do you have a Planned Giving strategy and plan? Is the plan consistently followed-through?
- Is every hand-raiser getting *at least* 2 personalized touch-points per year? (And actually receiving them?)
- Are you major gifts fundraisers bringing up legacy giving with select suspects?

Your database needs to support tracking this!



Automations Revolutionize Planned Giving Programs

The old way:

Simple donor journies.

Mail and phone.

A brochure, newsletter drip marketing.

Out-of-home ads like newspapers for wider reach.





Planned Giving needs to enter the digital era

(Micro-sites don't count)

How to make 750 donors feel special

You don't always need the 1:1!



Fundraising Foundations Part 2

Planned Giving “program architecture”!

- Who has identified they need to work on this?
- Who has a great Planned Giving system?

Q&A

Email me any time: tess@fullpotentialfundraising.com

QR code to the free webpage guide:



fullpotentialfundraising.com/CompassPgGuide