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IAC WEBINAR SERIES

USING TELEMARKETING AS PART OF YOUR GIFTS IN WILLS FUNDRAISING PROGRAM

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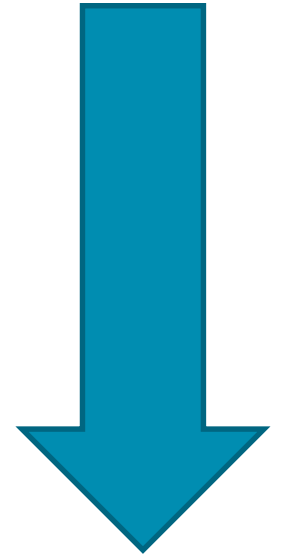
Fundraising Institute Australia

Using Telemarketing for Gifts in Wills

- Overview to using telemarketing in Gifts in Wills
- Background to Stroke Foundation case study
- Pre-Campaign Activity / Preparation
- In-Campaign Activity
- Post-Campaign Activity
- Using Your Results
- Next Steps / Reflections

What are you using the phone for?

- One-off activity vs. On-going integral part of your campaign
- Building internal capacity vs. Outsourcing to external source
- Embedding for the future vs. Transitioning to something new
- Establish what the focus of your calls is going to be:
 - Identification of new leads from existing supporters
 - Conversion of existing Gifts in Wills supporters
 - Donor care touch points for Gifts in Wills supporters
 - Re-classification and update status of existing supporters
 - Stewardship contact of existing Gifts in Wills supporters
 - Re-confirmation of committed Gifts in Wills supporters



Considerations, thinking and questions

- Important to understand the distinction between Trusted relationship-based conversations vs. Transactional sales-based calls
- Do you use an existing agency you may already be using for Regular Giving / Acquisition / Upgrades or trial a new one you've not used before?
- Specialist in your charity or specialist in Gifts in Wills?
- Ability to broach many topics or a single-focus?
- Encourage cash giving or focus on Gifts in Wills call outcome?
- Structuring of charging / budgeting? Negotiate call rates and determine if charging is based on connected calls / question answered / call attempts etc.
- Engage agency for post-call fulfilment / follow-up?

Background to Stroke Foundation Case Study

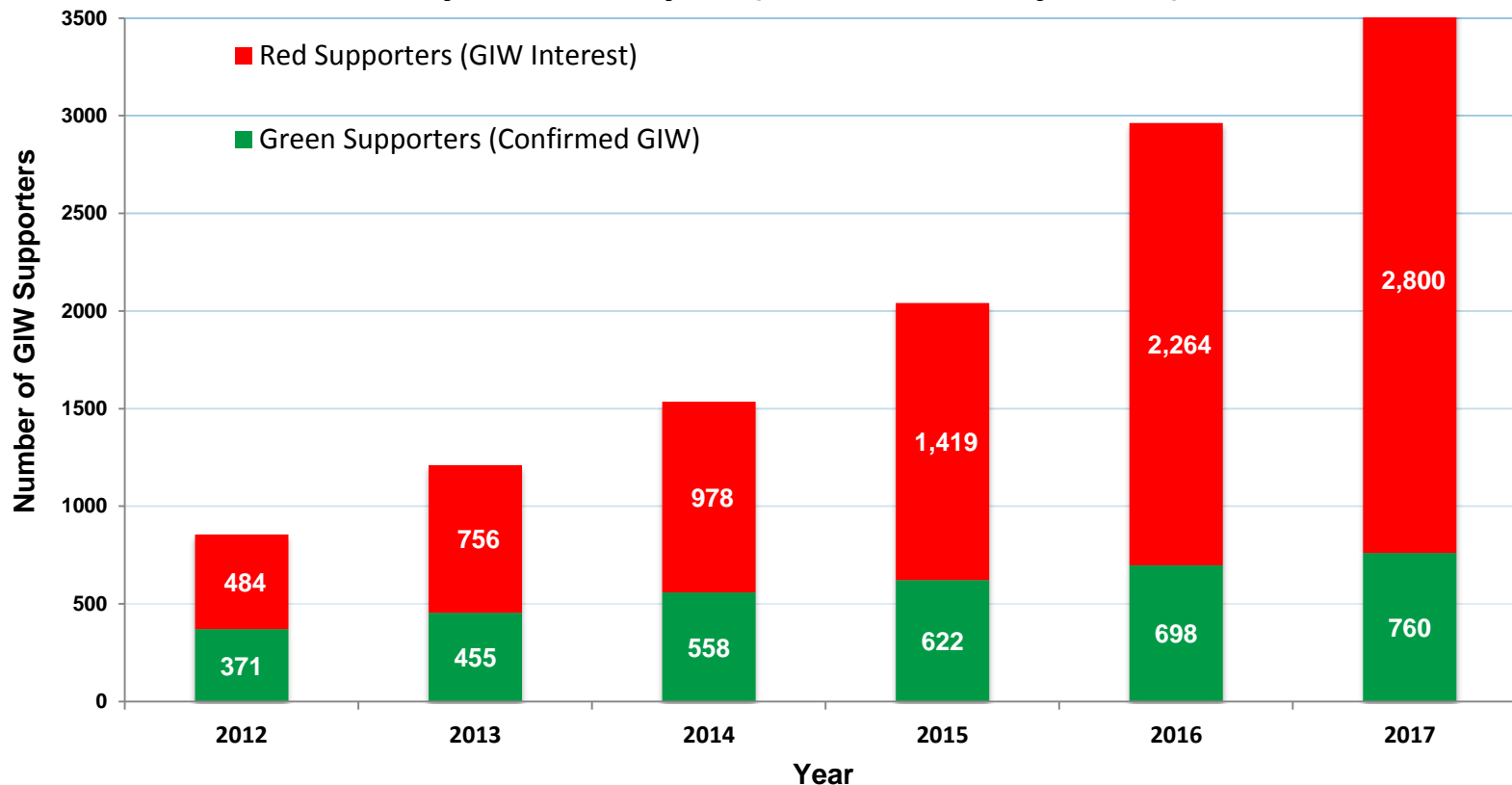
- Stroke Foundation established in its current form in 1996
- Huge supporter acquisition via Direct Mail Appeals in 2006-2008
- Average age of our supporters in 76 years old
- 90,000+ active supporters who have given a cash gift in last 12 months
- After 6 years of running a traditional Bequest Program including bequest society, visitations, small engagement events, part-time Bequest Officers -
 - 371 supporters with a gift in their Will
 - 484 supporters thinking about doing it
- Pareto benchmarking suggests that we should have between 1% - 2% of active donors as confirmed bequestors i.e. we could expect to have c.1,000 – 2,000 supporters who have included gifts in their Wills

Background to Stroke Foundation Case Study

- Board & CEO approved additional investment required in rapidly building a proactive Gifts in Wills Fundraising Program in March 2013
- Very broad targeting to rapidly increase the reach of the program
- Selected **30,000+** of existing supporters have been giving for at least 3 years / given more than 6 gifts over that time / exclude supporters under 55 years old
- Second-half of 2013 we piloted a range of techniques to identify interest in Gifts in Wills amongst our existing supporters using a random sample of 10,000 for split tests
 - Surveys with embedded Gifts in Wills question
 - Gifts in Wills Appeal Pack – with cash ask / without cash ask
 - With / without phone agency follow-up to non-responders
- Identified the most effective technique to accelerate our Gifts in Wills Program to reach out to 30,000+ supporters over 4 years to identify interest
- Not necessarily the most cost-effective – but the best way to accurately classify supporters interest and focus our resources in future

Background to Stroke Foundation Case Study

**Number of Supporters in Gifts in Wills Program
July 2012 – July 16 (With 2017 Projection)**



Pre-Campaign Activity / Preparation

- Establish clear expectations about purpose / focus of the calls
- Targeting and selection of supporters – criteria / data transfer
- Visibility of supporter information relevant to personalising the call content
 - First donation date
 - Total amount donated
 - Cash Donor/Regular Donor/ Volunteer/Member
 - Last donation date and amount
- Careful scripting and supplementary reference material
- Technical campaign set-up and clear directions for format and content of caller notes
- Selection of appropriate callers / build on previous experience

Pre-Campaign Activity / Preparation

- Writing comprehensive easy-to-understand training material / information packs

STROKE MYTHS
AND HOW YOU CAN HELP
GIVE PEOPLE THE TRUTH.

MYTH: STROKE STRIKES AT RANDOM
REALITY: Most strokes are preventable. If risk factors are known, detected early and managed well, you can greatly reduce your chance of having a stroke. National Stroke Foundation initiatives like 'Know your numbers' are designed to get that crucial information to more Australians.

MYTH: STROKE ONLY HAPPENS TO OLDER PEOPLE
REALITY: In 2012 there were over 420,000 people living with the effects of stroke and 30% of these people were of working age. It even happens to unborn babies. You're never too young to start taking steps to reduce your chance of having a stroke - many of the risk factors for stroke can be traced back to early adulthood. The Stroke Foundation invests some of you donations in research to better understand why strokes happen to old and young people - and how they can be prevented and treated.

MYTH: STROKE HAPPENS WITHOUT WARNING
REALITY: Many strokes occur without warning. Symptoms mirror other conditions such as 'mini-strokes'. Symptoms mirror the signs of stroke and...

Gifts in Wills - creating a world free from stroke

strokefoundation

Why is our work important?

- EVERY 10 MINUTES someone has a stroke
- 51 THOUSAND Australians will have a stroke in 2016
- OVER 10 MILLION Australians are currently treated
- 437 THOUSAND Australians are living with a stroke
- 434 THOUSAND Australians have an irregular heartbeat
- 6.1 MILLION Australians have high cholesterol
- 2 OUT OF 3 stroke survivors live with long-term problems
- 4.1 MILLION Australians have high blood pressure
- \$5 BILLION stroke costs the Australian economy \$5 billion a year

March 2016 Training Presentation to Apple Marketing about Gifts in Wills at the Stroke Foundation

Who are you calling?

- Early February** We selected 6,700 of our existing supporters with a good history of donating. We want to ask as many of them as possible if they'd ever thought about including a gift in their Will.
- Mid February** 6,700 supporters were sent gifts in Wills Appeal Pack. It included a gift to their Will and let us know by completing and returning a response form.
- Late February** We've received responses from 100s of supporters who completed and returned the appeal pack response form. Their responses have been noted and those supporters have been removed from your follow up calls.
- First 3 weeks of March** Apple telemarketers will start calling supporters who've not responded to the appeal. They're not asking them if they've had a chance to read the appeal pack and if they'd ever thought about including a gift in their Will.

What happens after the call?

- Stroke Foundation send **Fulfillment Pack** - Letter + Booklet
- Stroke Foundation letters to the call recording
- All information from the call is transferred onto our database
- Follow-up from Gifts in Wills Office @ Stroke Foundation
- On going relationship with supporter over many years
- Hopefully they'll include a gift in their Will at some point

Positive Responses

- Stroke Foundation doesn't listen to these call recordings, we just look at the notes you've typed about the call
- Responses transferred on Database
- Any additional information noted (e.g. less mail)
- We won't ask them again about including a gift in their Will

Negative Responses

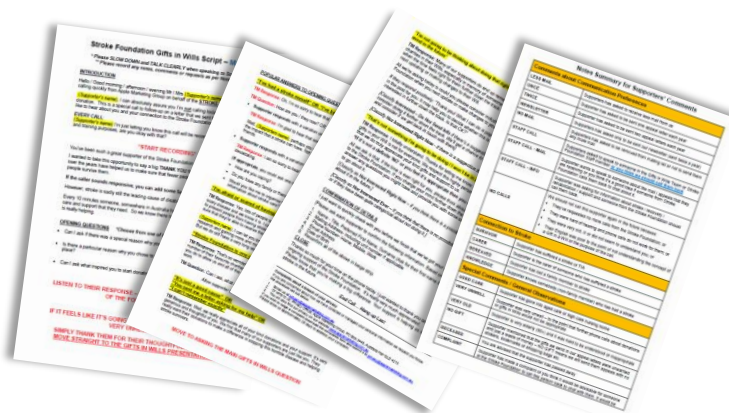
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Pre-Campaign Activity / Preparation

- Careful scripting and supplementary reference material



- Incorporate strong elements of social norming, nudging, simple and accessible case studies - don't over-clutter the script
- Keep the 'Gifts in Wills ask' clear and simple
- Build-in opportunities to modify and adapt the script – talk through different scenarios with the call team before calling starts
- Adapt the script to keep conversation flowing

Clarity of Call Outcome Classifications

- Deciding upon our approach to coding and classifying the supporters interest in including a Gift in their Will and being clear with our interpretations with the callers:
 - Confirmed
 - Interested
 - Interested – No Follow-up Information Requested
 - Not Interested Right Now
 - Not Interested Ever
 - Not Asked / Not Answered
- Calibrating the classifications that the callers make with your own interpretations prevents inaccurate results and false-positive leads

Clarity of Call Outcome Classifications

Apple Marketing - Classifying our Supporters based on their level of commitment / interest in including a gift to the Stroke Foundation in their Will

Classification	Confirmed	Interested – Send Info Interested – Do Not Send Info	Not Interested Right Now	Not Interested Ever	Not Asked Not Answered
<p>What each classification means</p>	<p>A supporter has told you that they have already included a gift in their Will to the Stroke Foundation.</p> <p>Some supporters may say that they <u>think</u> that they have included the Stroke Foundation in their Will, but they may not be absolutely certain. This is especially the case if they have included a few different charities, but can't recall which ones exactly.</p> <p>If there are opportunities and it feels comfortable, you could explore if they are happy to tell us more about the type of gift they have included or if they give an indication about what the size of the gift will be.</p> <p>We need to find out if there are any specific restrictions on the gift that they have included or if there were instructions about how / where the gift can be used once we receive it.</p>	<p>A supporter is generally positive about the subject and is open-minded about the idea of including a gift to the Stroke Foundation in their Will.</p> <p>In their comments, they have shown a degree of interest about including a gift in their Will or have mentioned that they are already thinking about doing it.</p> <p>They have given us permission to explore their level of interest and discuss things in more detail.</p> <p>For the purpose of this campaign this category covers a very broad spread of interest on the topic of including a gift in their Will:</p> <ul style="list-style-type: none"> - Open to the idea / Initially interested - Please just send me some info on this & leave it with me - Yes, I am currently considering including a gift in my Will - I may do that quite soon - May think about it further down the track – might be vague with their timeline - Not something that they've thought about up until now – but they're not closed to the idea <p>If they're really interested, we ideally would like to find out if this is something they are thinking of doing in the near future.</p>	<p>A supporter has indicated that they are not against the idea and there is a possibility that they might consider including a gift in their Will at some point in the future. But now is not the right time for them to think about it or discuss it any further.</p> <p>They might understand that including a gift to a charity in their Will is a positive thing for them to do, but it's not going to happen at the moment. You think that they might not object to being asked the same question again in a few years' time, perhaps at a time that is right for them.</p> <p>Unless they say otherwise, we could approach them and ask them again in the future.</p> <p>If you feel that they would not be open to another approach in the future or might react badly to being asked again, please classify them as 'Not Interested Ever' rather than 'Not Interested Right Now'.</p> <p>If they just say that they can't speak right now or they don't have the time to talk – leave their status as 'Unknown'</p>	<p>A supporter has told you that they are definitely not interested in including a gift to the Stroke Foundation in their Will.</p> <p>From their comments, you think it is highly unlikely they are ever going to include a gift in their Will in the future and it might damage our relationship with that supporter to ask them again in the future.</p> <p>A supporter has specifically advised you that they don't want to be asked again about whether or not they are thinking of including a gift in their Will.</p> <p>If you have any concerns whatsoever about the supporter's ability to understand what you're asking them or their capacity to update or revise their Will, please classify them as 'Not Interested Ever'.</p> <p>If you get the sense that it is not a definite 'No' and you think that they wouldn't be offended by being asked again in the future, please classify them as 'Not Interested Right Now'.</p> <p>If they just say that they can't speak right now or they don't have the time to talk – leave their status as 'Unknown'</p>	<p>There was not an opportunity to ask the supporter about whether or not they would think about including a gift in their Will.</p> <p>Or</p> <p>When you asked them that question, they either refused to answer the question directly or they didn't round to answering the question before you ended the call.</p> <p>Or</p> <p>It was inappropriate to ask the supporter that question at the time you called and the topic of Gifts in Wills wasn't raised.</p> <p><i>[N.B. If you think it'll never be appropriate to ask them about Gifts in Wills, please see the comments below]</i></p>
<p>What our supporters might say to you</p>	<p>"I've included a gift to the Stroke Foundation in my Will"</p> <p>"Don't worry - you're already in my Will."</p> <p>"I've included you and other charities in my Will"</p> <p>"I visited my solicitor and updated my Will to include a bequest to the Stroke Foundation"</p> <p>"I think I've included a gift to the Stroke Foundation in my Will"</p>	<p>"It's probably something that I should do, but I haven't really thought about it"</p> <p>"Other charities I support have asked me about the same thing. I'm thinking about doing it"</p> <p>"I'd like to learn more / find out more about how to do it"</p> <p>"Sounds interesting, but I'd need to find out more before making a decision"</p> <p>"I've been thinking about doing it"</p> <p>"I've spoken to my partner / family about it"</p> <p>"I'm still deciding. I need more information about it before I can commit"</p> <p>"I'll be revising / updating my Will and I'll be including a gift then"</p> <p>"I might do it further down the track, but that won't be any time soon"</p>	<p>"I'm not that interested in finding out anything more about that at the moment"</p> <p>"The time isn't right for me to think about that at the moment"</p> <p>"It's not a definite 'no', but not right now"</p> <p>"It might be something that I'll consider doing in the future, but I'm really not thinking about that at the moment and don't want to talk about it"</p> <p>"I've got other charities in my Will, but not the Stroke Foundation at the moment"</p> <p>"I don't have a Will at the moment"</p> <p>"I'm too young to think about that right now"</p>	<p>"You're not in my Will and I'm not going to be updating it again"</p> <p>"I can't include any charities in my Will"</p> <p>"I'm leaving everything to the family"</p> <p>"I'm not interested"</p> <p>"It's highly unlikely I'm going to do that"</p> <p>"I'm never going to include a gift to a charity in my Will"</p> <p>"Please don't ask me again or send me any information about bequests / gifts in Wills"</p>	

In-Campaign Activity

- Extensive initial training and briefing for the calling team – get them excited about your work and the calls they'll be making
- Regular monitoring of quality of calls across the calling campaign and clear, in-the-moment feedback / quick response to questions from the calling team
- Regular coaching of callers, refining the script and continuous feedback loop – be prepared to adapt and re-train
- Caller Team Leader / Call Centre Manager involvement
- Real-time reporting / regular data transfer to check
- Careful planning of any post-call follow-up activity for the supporters

Post-Campaign Activity

- Data consolidation / transfer in your own CRM
- Immediate follow-up of all positive leads
- Internal view of campaign outcomes – what worked? What could be improved?
- Feedback on scripting and supplementary information.
- Feedback and de-brief with the call team
- Wash-up and gathering insights with agency
- Planning for your next engagement, request modifications

Results

- Have realistic expectations, especially if you've had an active Gifts in Wills program in place already
- Accuracy of leads and suggestions to improve retention rates
- Analysis of retention of leads – this should improve over time as the campaign evolves
- Finding out those supporters who are definitely not going to include charities in their Wills alongside those who are not yet in a position to have that conversation (but may be open to the possibility in the future) is just as important to finding out those who have already done it!

Calling results across July 2013 – July 2016

	At the time of the campaign	%	Current Status as at July 2016	Retention Rate
Number of supporters selected to call	31,797	-	-	-
Number of conversations	14,645	41.2%	-	-
Interested	1,739	11.9%	1,147	66%
Planning	134	0.9%	79	59%
Confirmed	104	0.7%	142	137%
Total Positive Leads	1,977	13.5%	1,368	70%*

* Since 2014 we've seen retention rates of well over 80% after making improvements to caller classification and training / coaching

Next Steps / Reflections

- Be prepared to evolve the campaign and keep pace with what you want it to achieve
- Build-in in data insights to help with better targeting for next calling campaign
- Ensure that you deliver enhanced training and coaching to the call team whenever possible
- Continuity of callers has meant that we have the ability to build on previous campaigns and build rapport – treat them as an extension of your own team
- Test and refine – share experience with others
- Work collaboratively with the agency and other charities

Next Steps / Reflections

- View the telemarketing activity as an integral part of your Gifts in Wills Program and the agency calling team as an extension of your own team



15 DO'S AND DON'T'S OF TELEPHONE CALLS FOR MAJOR AND LEGACY GIFT FUNDRAISERS

15 DO'S

- ✓ 1. Be straightforward. Identify the the reason(s) for your call.
- ✓ 2. Ask great open-ended questions that encourage dialogue and show that you are sincerely interested and care about that particular person.
- ✓ 3. Listen. Your supporters want to be heard. If you do it right, they'll talk at least twice as much as you. Hopefully more.
- ✓ 4. Your mission is worthy so smile and be confident. It radiates through the phone line. I'm not kidding. People can sense how you feel right through the phone line.
- ✓ 5. Be honest always! You WILL get found out if you lie or tell half-truths.
- ✓ 6. Test everything. For instance, what opening lines work better than others.
- ✓ 7. Keep a pen and paper nearby so you can take notes. You simply won't remember each call.
- ✓ 8. Match your energy level and tone with that of your supporter's. Be a chameleon.
- ✓ 9. If you made any kind of promise during the call, be sure you do what you said you were 'gonna do.
- ✓ 10. Send personalized, relevant follow-up emails to those who want more information or appointment confirmations to those who agreed to meet.
- ✓ 11. Be loose. Shmooze a bit. You can't read a script if you really want to engage your supporters. Instead, tell stories.
- ✓ 12. Be a team player. Let others in your organization know what you are doing (especially if you are outsourcing the calls to a vendor).

- ✓ 13. Treat people how THEY would like to be treated.. Especially as you develop your calling strategy.
- ✓ 14. Use technology to be more efficient (such as CRM, auto-dialing click widgets, etc.).
- ✓ 15. Most of all, employ telemarketing as part of an integrated approach that complements other marketing activities— not as a solo, one-shot effort.

15 DON'T'S

- ✓ 1. Be disingenuous. For instance, don't apologize for calling. You're not sorry and your prospect knows you it. Similarly, don't lie about anything. You will be found out. If you don't know the answer to a question, be honest about it and then promise to find out and call them back with an answer.
- ✓ 2. Be afraid to change your approach and message if it isn't working.
- ✓ 3. Interrupt your supporter when they are talking. It is a clear indication that you don't care about what they have to say.
- ✓ 4. Forget the specific, strategic reason for your call (unless you failed to devise a strategy in the first place). Stay on track. Aim to achieve the goal you originally set.
- ✓ 5. Read a script word for word.
- ✓ 6. Forget to address the person by name (but only after asking for permission to do so first). Then don't overuse their name. That will sound tacky.
- ✓ 7. Prejudge. You never know which call might turn into a fantastic opportunity for you and your supporter.

- ✓ 8. Type while you are they are talking. In fact, don't type at all. Use a pen. They can hear you!
- ✓ 9. Stuff pauses with "like", "um" and "er".
- ✓ 10. Use jargon your supporter won't understand. They are not involved in your organization's mission day in and day out the way you are and they'll feel stupid.
- ✓ 11. Worry too much about failure. Most people will become more engaged with your mission thanks to your outreach. But some might actually become less engaged. You can't worry about the possibility of failure. The positives gained will surely outweigh any negatives. And, besides, if you do nothing, you'll fail for sure.
- ✓ 12. Talk over your prospect – it shows you aren't listening.
- ✓ 13. Allow any background noise when you are calling. It's disrespectful. If you are nearby other callers make sure it doesn't sound like you are in a call center on the other end of the line. Your supporter will feel like a piece of meat.
- ✓ 14. Argue or debate with your supporter. Look for ways to agree not disagree.
- ✓ 15. Underestimate the power telemarketing to build better relationships with your supporters.

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QUESTIONS?

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