

include a charity
Help the work live on.

IAC WEBINAR SERIES

MULTI-CHANNEL MARKETING STRATEGY FOR BEQUEST PLANNED GIFTS, A PRACTICAL SESSION

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DIRECT MARKETING MANAGER – EVENTS & GIFTS IN WILLS
CEREBRAL PALSY ALLIANCE

 [@TIZZAH](https://twitter.com/@TIZZAH)
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 **go fundraise**
GO MAKE A
DIFFERENCE

 **fia**

Fundraising Institute Australia

Agenda

1. Learn from your donors
2. Qualify your database
3. Segment prospects and collaborators
4. Design a 12 months multi-channel communications map
5. Reaching out to prospects
 - a) Telemarketing campaign
 - b) Donor survey and DM
6. F2F engagement opportunities—leverage donor events
7. Enhance efforts on donor care
8. Digital integration and practical advice on how to reach your targeted donors on Facebook
9. Budgeting and visual pipeline

Learn with your donors

1. Develop a detailed cohort and donor behavioural analysis of your charity's:
 1. Confirmed group.
 2. Warm leads (considers/enquirers and intender/planners)
2. Pinpoint key identifiers and motivators.

**Confirmed
N people**



- Average Age
- Predominant gender
- Average number of donations to the charity
- Average recency
- Average value

How does she encounters your charity:

1. Mail
2. Invitations to exclusive events
3. Call
4. Welcome letter and 'gifts'

Goals and motivations:

- *i.e. Acquaintance with CEO or Board Members.*

Device use:

- Landline Telephone
- Mail and email

Demographic Location

- *Is there a prominent presence in a state, council or area?*

**Warm Leads (Considers and Planners)
N people**



- Average Age
- Predominant gender
- Average number of donations to the charity
- Average recency
- Average value

How does she encounters your charity:

5. Mail
6. Invitations to exclusive events
7. Call

Goals and motivations:

- *i.e. Personal connection with the cause*

Device use:

- Landline Telephone
- Mail and email

Demographic Location






- *Is there a prominent presence in a state, council or area?*

Bequest Score

- Based on the previous analysis, categorise donors within your database per likelihood of leaving a bequest.
- Design your indicators by analysing your confirmed bequestors (their average gift, proximity to the cause, recency and others)

Indicator	Score
N Number of Gifts	1
N Number of Gifts + Recency	1
Recency	1
Medium gift value	1
High gift value	2
Age (elderly)	2
Family Status	3
Marital Status	2
Has a connection to the cause	3
Volunteer	1
Total	17

Segment prospects and collaborators

Prospect 1 Barry – Unknown Donor	Prospect 2 Dorothy – Silent Generation	Prospect 3 Sandra – Baby Boomer	Collaborator A Staff and Volunteers	Collaborator B Lawyers
				
<p><i>'Unexpected'</i></p> <p>Age: 75+ Gender:</p> <p>How does he encountered your charity</p> <ul style="list-style-type: none"> i.e. Donation Boxes i.e. Recommendation from solicitor <p>Goals and motivations:</p> <ul style="list-style-type: none"> i.e. Personal connection to the cause <p>Average bequest gift</p> <ul style="list-style-type: none"> i.e. \$100,000 <p>Device use:</p> <ul style="list-style-type: none"> i.e. Landline Telephone i.e. Mail 	<p><i>'On the Verge of Conversion'</i></p> <p>Age: 75+ Gender: N% female</p> <p>How does she encounters your charity:</p> <ul style="list-style-type: none"> i.e. Events <p>Goals and motivations:</p> <ul style="list-style-type: none"> i.e. Family member touched by the cause <p>Average gift:</p> <ul style="list-style-type: none"> i.e. \$150 <p>Average recency:</p> <ul style="list-style-type: none"> i.e. 5+ gifts in 12 months <p>Device use:</p> <ul style="list-style-type: none"> i.e. Mail 	<p><i>'Lead with Good Potential'</i></p> <p>Age: 55 - 72 Gender: N% female</p> <p>How does she encounters your charity:</p> <ul style="list-style-type: none"> i.e. Mail & email <p>Goals and motivations:</p> <ul style="list-style-type: none"> i.e. Professional experience close to the cause. <p>Average gift:</p> <ul style="list-style-type: none"> i.e. \$55 <p>Average recency:</p> <ul style="list-style-type: none"> i.e. 5+ gifts in 24 months <p>Device use:</p> <ul style="list-style-type: none"> i.e. Computer, tablet, smart phone, social media. 	<p><i>'Information & Support'</i></p> <p>Age: All Gender: N% female</p> <p>How does she encounters your charity:</p> <ul style="list-style-type: none"> i.e. Working i.e. Volunteering <p>Goals and motivations:</p> <ul style="list-style-type: none"> i.e. Support beneficiaries and their families i.e. Charity Success <p>Device use:</p> <ul style="list-style-type: none"> i.e. Computer, tablet, smart phone, social media. 	<p><i>'Information & Support'</i></p> <p>Age: All Gender: All</p> <p>How does she encounters your charity:</p> <ul style="list-style-type: none"> i.e. Include a Charity brochure i.e. Website i.e. Bequest Manager <p>Goals and motivations:</p> <ul style="list-style-type: none"> i.e. Recommend reliable organisation i.e. Receive prompt support from organisation when needed. <p>Device use:</p> <ul style="list-style-type: none"> i.e. Computer, tablet, smart phone, social media.

Design a 12 months communications map

Loyalty Loop Strategy



Reaching out to prospects—Calling Campaign

- Prospecting and lead qualification call, likely to be the first conversation donors will have with your brand about bequest.
- Select prospects with a base score of N (i.e. score 5) and above, based on volume.
- Recommended a call volume of at least 4,000 donors with valid phone numbers to achieve a penetration of approximately 3,500 being 2,000 billable contact (qualified leads).

Reaching out to prospects—Calling Campaign

Calling Total Investment & ROI			
Leads	Results	Future Income	ROI (CPA Campaign)
Considers	N	N * 45,000	169.01
Intenders	N	N * 45,000	15.24
Confirmed	N	N * 45,000	5.83

ROI of **30.8** considering a conservative conversion ratio of 1/6 considers and intenders to the confirmed bequestor stage.



Reaching out to prospects—Donor Survey

- Part of your Appeals Programme calendar
- Personalised for confirmed bequestors (to re-confirm) and warm leads (identify progress)
- Test premium pack for high score donors.

Thank you for your support

Your views and opinions are invaluable to us. Personalised. You can help again today by making a gift towards providing vital equipment to help children like Brono. Thank you.

Yes, please accept a gift of:

\$1000 \$2000 \$3000 \$4000 \$5000

Please find out

Cheque Money order Gift

Please debit my

Credit Card Debit Card

Home no:

Mobile:

Signature:

OR

Telephone & Mailing Address:

2015 Supporter Survey

CONFIDENTIAL

Many supporters choose to include a gift to Cerebral Palsy Alliance in their Will. These types of gifts are vital to ensuring we can continue to provide services to people with cerebral palsy. Once you have provided for your family and loved ones, would you consider remembering Cerebral Palsy Alliance with a gift in your Will?

Please tick one box only

Yes, I have already mentioned Cerebral Palsy Alliance in my Will

I intend to include Cerebral Palsy Alliance when I next revise my Will

I would consider remembering Cerebral Palsy Alliance in my Will. Please send me some information

I have written a Will and have mentioned charities but do not intend to include Cerebral Palsy Alliance in my Will at this time

I have written a Will but have chosen not to include Cerebral Palsy Alliance

I do not have a Will

Continued back page...

Dispositions over \$2 are tax deductible.
Please return your donation to:
**Cerebral Palsy Alliance, PO Box 6427
Prestons Forest NSW 2086**
If you would like to make your gift over the phone, please call 1300 136 140.

Privacy
Cerebral Palsy Alliance collects personal information about you in order to provide you with information and direct marketing materials in respect of our charitable objectives, and, unless you opt out or unsubscribe, may contact you in the future via email, text, or telephone. We retain your personal information for direct and indirect communications. Failure to provide personal information may result in Cerebral Palsy Alliance unable to provide you with services, information and offers. Our Third Party service providers may also collect information about you and share it with other organisations. If you do not wish to provide your personal information, please contact us at 1300 136 140. If you do not wish to provide your personal information, please contact us at 1300 136 140. If you do not wish to provide your personal information, please contact us at 1300 136 140.

Please tick here if you do NOT want to receive future communications from Cerebral Palsy Alliance.

Please tick here if you do NOT want to receive future communications from other organisations.

Rev Graehame Ellis

“When our son David was born with cerebral palsy, Cerebral Palsy Alliance was a lifesaver. Leaving a gift in our Will to them was one way to say ‘thank you’.”

Private and Confidential

Thank you!

Reaching out to prospects—DM Results

Donor Survey and DM Total Investment & ROI			
Leads	Results	Future Income	ROI (CPA Campaign)
Considers	N	N * 45,000	16.46
Intenders	N	N * 45,000	13.07
Confirmed	N	N * 45,000	5.83

ROI of 7.4 for a conservative conversion ratio of moving 1/4 of considers and intenders to the confirmed bequestor stage.

Leverage donor events

- Engage field workers and beneficiaries to present.
- Integrated messaging.
- [Make a DVD](#)



A gift in your Will to
Cerebral Palsy Alliance.
Your gift of hope for future generations.



Leverage donor events

- Invite prospects
- Send post-event letter with an update to all donors who were invited
- Personalise prospects, confirmed bequestors and warm leads.

Your exclusive update

More than 80 of our loyal donors attended a special morning tea on 24 November 2015 and had the opportunity to hear firsthand what their support is achieving for people with cerebral palsy.

This is what our presenters asked us to tell you:

I would not have attended without you "Thank you, this has made a huge difference in the lives of people with cerebral palsy and their families." Rosemary Croagh, March 2008

What interested us

"I liked that you were presenting a different perspective on what it is like to live with cerebral palsy. I liked that you were presenting a different perspective on what it is like to live with cerebral palsy. I liked that you were presenting a different perspective on what it is like to live with cerebral palsy." Mrs. Dorothy, March 2015

A gift of inspiration

"I loved that you were presenting a different perspective on what it is like to live with cerebral palsy. I loved that you were presenting a different perspective on what it is like to live with cerebral palsy. I loved that you were presenting a different perspective on what it is like to live with cerebral palsy." Mrs. Sharon, 2015

Thank you for all that you do

I found today absolutely fantastic. "I liked it so much because it was such a wonderful opportunity, particularly from with the research that's going on." Dorothy Spence, August 2015

Thank you

AN EXCLUSIVE UPDATE ON WHAT YOUR SUPPORT IS ACHIEVING



Dear _____

I had the pleasure of hosting 80 of our kind-hearted donors at our second annual Cerebral Palsy Alliance special morning tea last week on Tuesday 24 November.

And as donors as you witnessed on the day, you are making a huge difference to the lives of clients like Maria. For Maria, the typical trials of ageing have been greatly impacted by her cerebral palsy. She was rapidly losing strength and fitness as a result of losing her independence.

One of our very talented, passionate exercise physiologist, Tegan Richers told donors that because of your support, she has been able to train regularly with Maria and her husband for the last four years at their local gym. You have helped Maria build strength and agility, avoid chronic illness and lose 10kg, giving her the chance of a better tomorrow. Thank you.

On the day, we also heard from research fellow Dr Petra Karlsen about how you are funding some of the world's brightest scientists to conduct ground breaking research into fields as diverse as preventing neuronal stroke, and utilising eye gaze technology for young children.

Mrs Marilee Thornton AM, our past president reminded us that one baby every 15 hours is born with cerebral palsy in Australia and shared her incredibly personal journey parenting a child with cerebral palsy. Because of you, many children and adults are achieving outstanding things and families are being strengthened. Marilee revealed her decision to include a gift in her Will to Cerebral Palsy Alliance and encouraged attendees to consider leaving a bequest to our organisation - a great way to provide a lasting legacy to our future generations.

There wasn't a dry eye in the house when Shannon Clough shared her moving story of losing her beautiful 5-year-old son Ethan. When Ethan was born at 26 weeks he was diagnosed as being profoundly deaf and hearing severe cerebral palsy. Shannon, like so many other parents, didn't have a clue about where to get help or what to do. Your support, she said, saved them.

Shannon's testimony was heartbreakingly honest. She proudly explained that her profoundly physically impaired but incredibly bright and cheeky son packed more in his six years than most people do in 60 years thanks to your support, which funded more than \$200,000 in equipment that Ethan needed to get through day-to-day life. You can find out more about her journey with Ethan by requesting a copy of our Guide in Will booklet via the feedback form at the bottom of this letter.

Finally, we heard from multi-award winning author Thomas Kenworthy AO, a longtime supporter. He explained his personal connection with our work and how pleased he was to attend the event. Many of our guests were thrilled to interact with Tom and delighted when he signed their books.

Above all, each of the speakers wanted you to know that you are providing the gift of opportunity to people with cerebral palsy. Thank you for your friendship, your compassion and your giving.

Finally, as one of our most important supporters, we invite you to share your thoughts about the kind of information you would like to receive from us. Once the form below is completed, all you need to do is send it back to us by popping it in the reply paid envelope provided.

Whatever way you support us today or into the future, we sincerely thank you.

Kind regards
Paul Henderson
 Chief Operating Officer
 Cerebral Palsy Alliance

PS: You are an essential part of allowing us to do what we do. Please complete the feedback form to help us build futures for people living with cerebral palsy. Please send it back in the reply envelope provided. Thank you.

YOUR FEEDBACK WOULD BE GREATLY APPRECIATED

Yes, please send me a copy of the video of the Cerebral Palsy Alliance special morning tea so I can see firsthand all that my support is achieving.

Here is my email address so you can arrange delivery: _____

I don't have a computer, please send me a copy of the DVD in a post.

Yes, please send me a copy of Cerebral Palsy Alliance's Gift in Will booklet so I can learn more about Shannon's moving journey with Ethan.

Yes, please include me on the distribution list for any more events like this.

Comment and feedback: _____

YOUR DETAILS

Do we have your correct contact details?
 Please fill in any blanks, and correct any errors in the box below. Thank you.

Title: Mr / Mrs / Ms / Mx / Dr / Sir

First Name: _____

Last name: _____

Address: _____

Phone: _____

Mobile: _____

Email: _____

Please return to:
 Make de Paks
 Cerebral Palsy Alliance
 PO Box 5627 Rancher Road, NSW, 2066
 181 440 6166, 1800 440 6166, 1800 440 6166
 1300 136 140 | #cerebralspalyalliance
 @cerebralspalyalliance



include *a charity*
 Help the work live on.

Leverage donor events

- Include short survey on post-event letter.

YOUR FEEDBACK WOULD BE GREATLY APPRECIATED

- Yes, please send me a copy of the video of the Cerebral Palsy Alliance special morning tea so I can see first-hand all that my support is achieving.
 - Here is my email address so you can arrange delivery _____
 - I don't have a computer, please send me a copy of the DVD via post.
- Yes, please send me a copy of Cerebral Palsy Alliance's Gift in Wills booklet so I can learn more about Shannon's moving journey with Ethan.
- Yes, please include me on the invitation list for any more events like this.

Comment and feedback:

Enhance efforts on donor care

- Make the welcome gifts for your confirmed bequestors an opportunity to connect them further with your cause.



Enhance efforts on donor care

Comment and feedback:

Thankyou so much for the lovely painting sent to me from Virginia, I also enjoy painting, so am thrilled to receive it. Please say thankyou to Virginia for me and keep painting!!
Love Norma.

Comment and feedback:

Dear Maisa, I want to say thank you very much for the painting Virginia did, tell her from me that she did a very nice job. Sorry I wouldn't be able to go to a Cerebral Palsy event unless it was in Rocky. I don't travel the best these days. Thank you again & All the Best for your future work, Regards Lola.

YOUR DETAILS

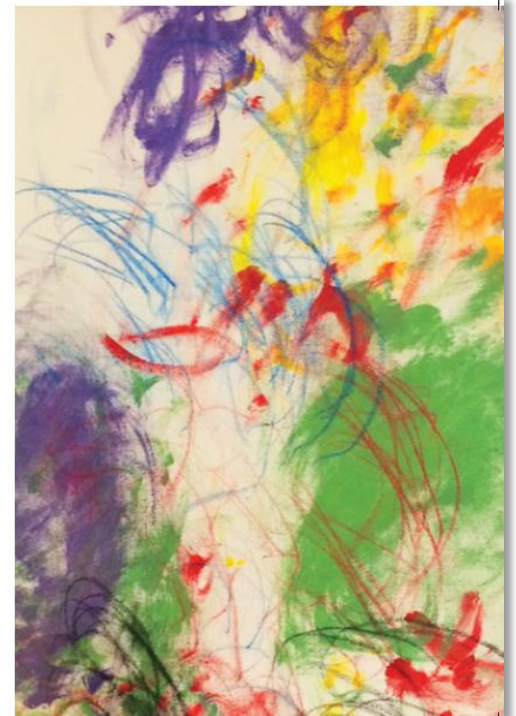
Enhance efforts on donor care

- Hand-write thank you cards for all prospects, warm leads and confirmed bequestor who donate to your Appeals. Post cards with the receipts.
- Integrate with cause messaging (client artwork).

Thank You

The picture in front of this card is a photograph of an artwork designed by Virginia Redenbach in 2015, she lives with cerebral palsy and attends the Art Workshop at our St Ives centre.

Virginia is an Artist, who likes Drama and has been receiving services from Cerebral Palsy Alliance for more than 20 years. Thanks for supporting and believing in people like Virginia.



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8. Digital integration and practical advice on how to reach your targeted donors on Facebook
9. Budgeting and visual pipeline

Digital integration

DIGITAL LANDSCAPE

SELECT MONTH

APRIL 2016 ▾

The Nielsen Digital Landscape is a monthly summary of Australian online behaviours. The interactive report gives you a summary of surfing and streaming behaviours, a trend report showing behaviours by device around device type comparisons and a gender breakdown of hybrid streaming.

	Ages 2-17	Ages 18-24	Ages 25-34	Ages 35-49	Ages 50+
Percentage of Online Australians	15.77%	12.50%	16.87%	23.78%	31.08%
Average Page Views Per Person	110	1,516	1,794	1,960	1,731

* Ages 2-17 are based off PC/MAC data only

Source: Digital Ratings (Monthly)

http://digitalmeasurement.nielsen.com/digitalmedialandscape/trend_report.html

Digital integration

Frequency of using social networking sites	Total	Male	Female	18-29	30-39	40-49	50-64	65+
At least once a day	50%	47%	54%	75%	66%	52%	38%	20%
Most days	7%	8%	6%	12%	7%	3%	8%	4%
A few times a week	7%	8%	6%	2%	4%	9%	10%	11%
About once a week	2%	2%	2%	0%	4%	2%	1%	2%
Less often than weekly	3%	3%	3%	1%	1%	4%	6%	3%
Never	31%	32%	29%	10%	18%	30%	37%	60%

[https://www.sensis.com.au/assets/PDFdirectory/Sensis Social Media Report 2016.PDF](https://www.sensis.com.au/assets/PDFdirectory/Sensis_Social_Media_Report_2016.PDF)

Social networking sites used	Male	Female	18-29	30-39	40-49	50-64	65+
Facebook	94%	97%	99%	94%	95%	91%	95%
LinkedIn	26%	21%	12%	30%	34%	30%	12%
Instagram	32%	30%	58%	36%	21%	11%	6%
Google+	10%	11%	9%	10%	15%	9%	11%
Twitter	25%	14%	33%	20%	11%	14%	4%
Pinterest	4%	18%	10%	16%	19%	5%	4%
Snapchat	27%	18%	60%	14%	10%	2%	2%
Tumblr	5%	5%	11%	4%	6%	0%	0%

Digital integration

1. First make sure your website is up-to-date, responsive and donor centric.
2. Take advantage of [Google Grants](#).
3. Invest on Google AdWords for specific campaign (i.e. Wills Day).
4. Post every trimester a bequest story on your organic Facebook page.
5. Invest on paid Facebook Ads to custom audiences for specific campaigns (i.e. Donor Events, Include a Charity Week)



Digital integration—Facebook

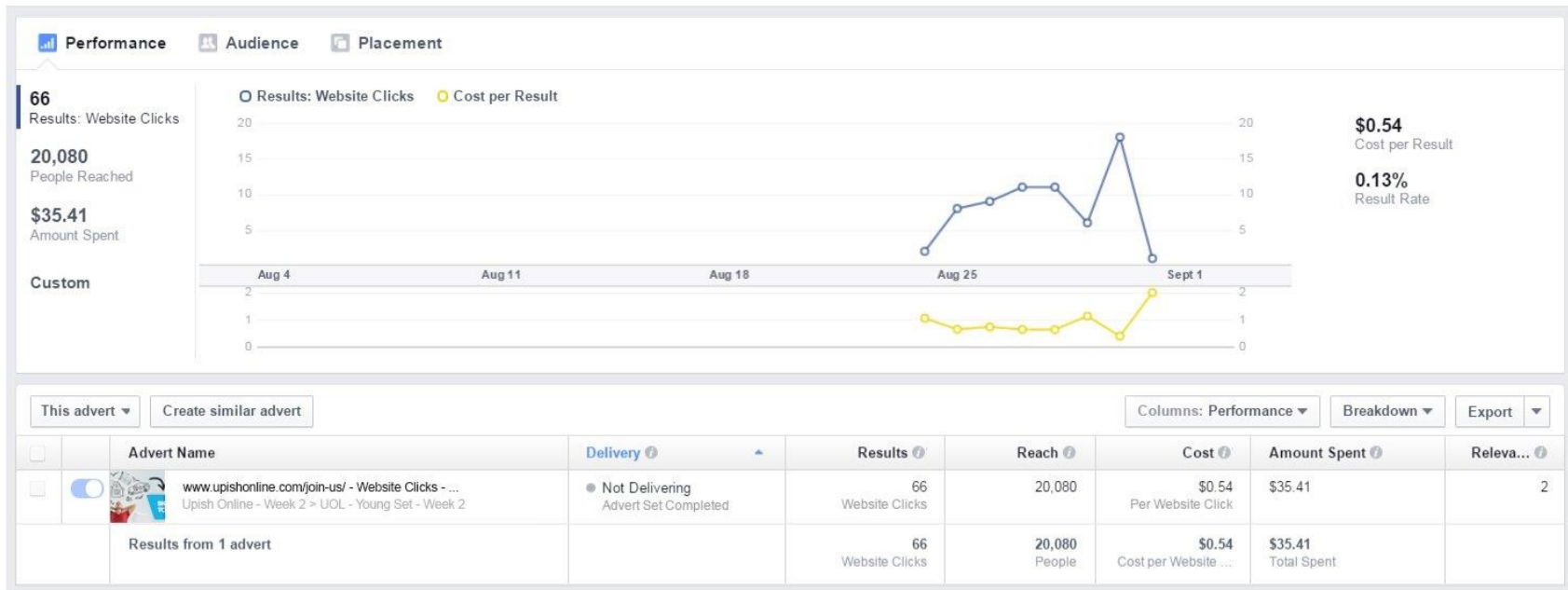
1. Integrate your page with Facebook Business Manager
2. Upload donors emails and/or mobile number on Facebook)



- Facebook will tell you roughly the number of matches – error margin of 500 to 1,000 matches, intentionally to protect users privacy.
- 2nd step is to create a lookalike audience.
- <http://www.cpcstrategy.com/blog/2016/04/facebook-lookalike-audiences/>

Digital integration—Facebook

Sample Facebook Reporting



Budgeting

- Calculate your charity average bequest gift by analysing bequest income and number of gifts in the past 10 FY.
- Forecast a conservative ROI per channel:
 - Convert 1/6 of warm leads generated via Calling
 - Convert 1/4 of warm leads generated via DM
 - Convert 1/2 of warm leads acquired via Donor Survey, events and digital
- Conservative time-frame for warm leads conversion to confirmed bequestor of 3.5 to 4 years.

Will Gap:

This study included an analysis of the gap between the year in which a final will was made, and the year of death of the will-maker. On average the gap was significantly smaller for those who left a charitable bequest:

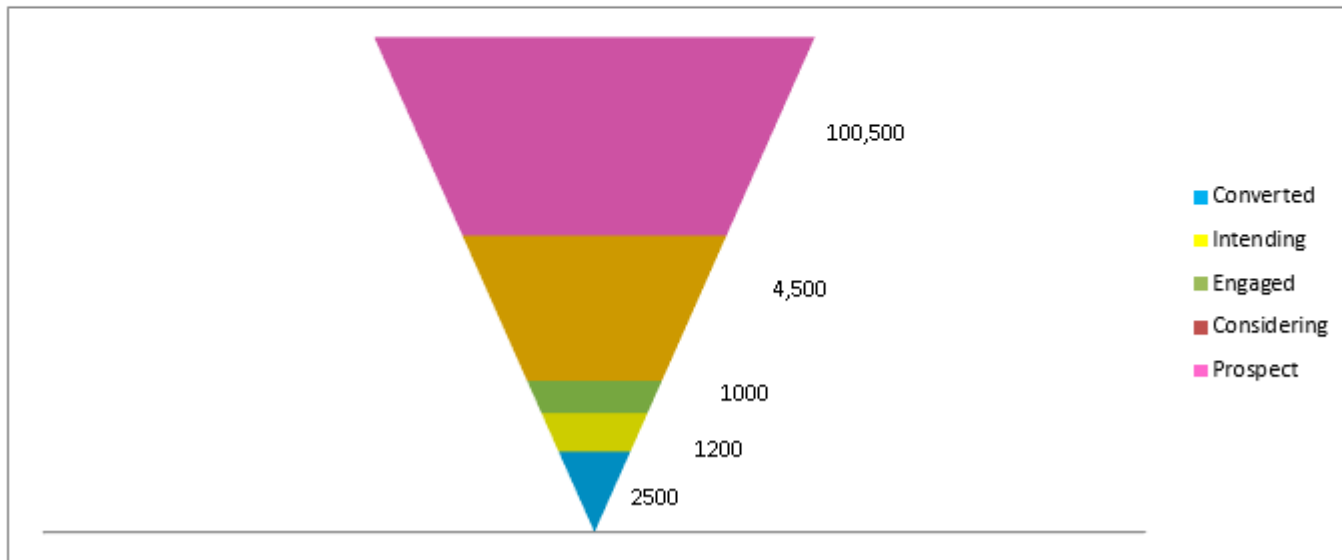
- 10 yrs no bequest
- 5.6 yrs included a charitable bequest.

<http://www.swinburne.edu.au/business/philanthropy/documents/ECBA-Final-Report-Feb2014.pdf>

Visual Pipeline

Conversion Funnel Life-Time

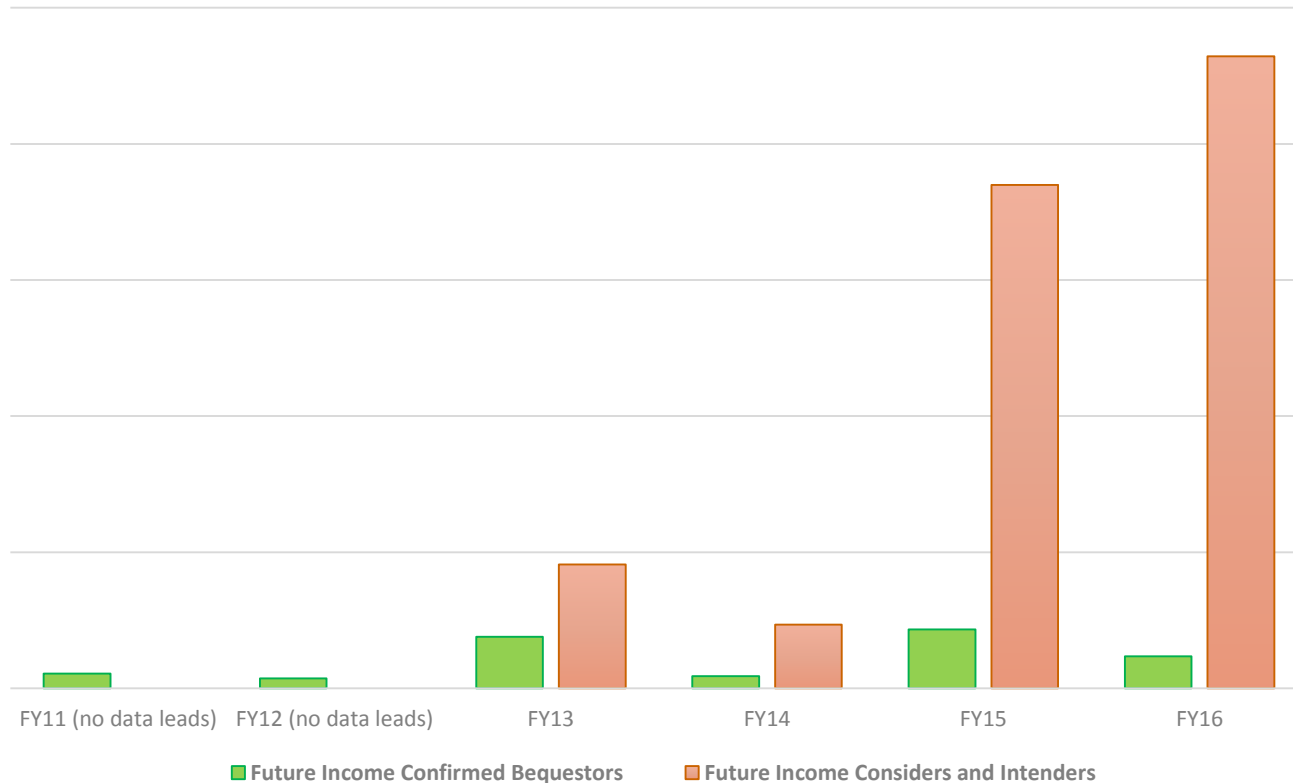
Stage	Number	A\$ Potential
Prospect	100,500	\$4,522,500,000.00
Considering	4,500	\$202,500,000.00
Engaged	1,000	\$45,000,000.00
Intending	1,200	\$54,000,000.00
Converted	2,500	\$112,500,000.00



Engaged are prospects who attended to an event, a site tour or any other 121 interaction (home visits, etc.)

Results—Cerebral Palsy Alliance Case Study

Confirmed Bequestors and Considerers/Intenders Future Income



include a charity
Help the work live on.

QUESTIONS?

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THANK YOU

include a charity
Help the work live on.

MAISA PAIVA MFIA

DIRECT MARKETING MANAGER – EVENTS & GIFTS IN WILLS

CEREBRAL PALSY ALLIANCE

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 [AU.LINKEDIN.COM/IN/MAISAPAIVA](https://au.linkedin.com/in/maisapaiva)

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