



Building an Internal Buy-in Strategy

with Cristina Caamano, RFDS SE Section

**Get your
affairs in
order**



Start from scratch

- Prepare your historical analysis from the last 10 years of realised bequests
- Know the worth of your program and it's future potential
 - Your average gift value
 - % of bequest revenue within Fundraising
 - % of bequest revenue within total organisation revenue
 - How many donors in your CRM match demographics of past realised gifts?
- Look up competitor's and sector-wide stats for comparison
- Set up your Open Estates Pipeline and Living Donor Pipeline

Put your initial touch points in place

- Prepare your collateral, have printed and digital copies of your brochures
- Make your collateral available and easy to access
- Create an impact leaflet of what your average gift can fund for service delivery
- Highlight any historic assets that were funded by bequests.



Set SMART goals



- Pick a specific goal or project that you want to achieve
- Pick a key message about your program's needs and stick to it
- Use the momentum from one success to start conversations for your next initiative
- Don't take on too much at once, make your goal realistic within a clear time frame.

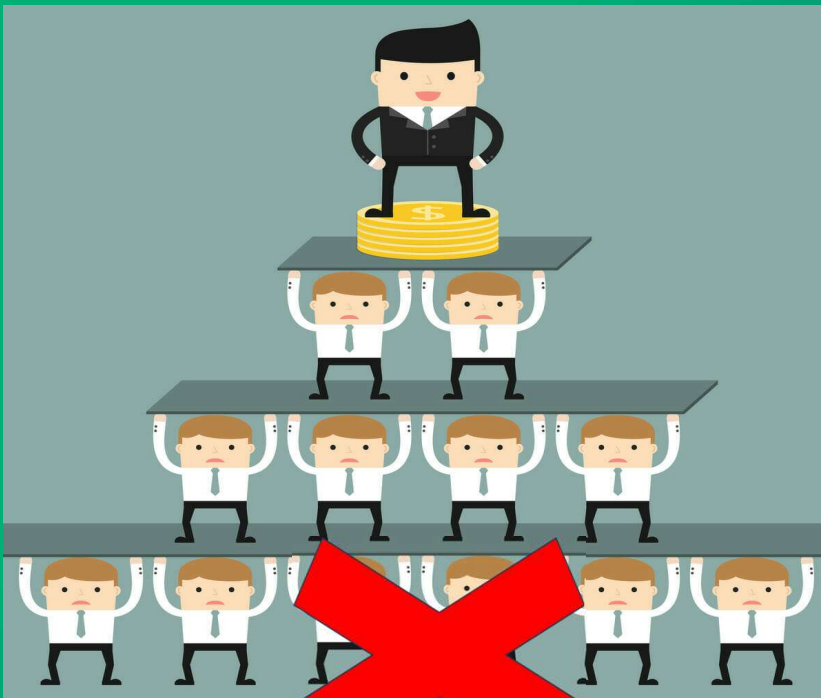
Identify your
opportunities
and barriers



Gauge initial interest and attitudes about your program

- Find out what internal stakeholders already know and if it's correct
- Create an education game plan to get everyone on the same page
 - What do people need to learn more about bequests and what your supporters care about?
 - Do they understand what your program is capable of if it gets more support internally?
- Make sure everyone has realistic expectations about ROI
- Be on the look out for competing interests, people don't like getting asked more than once for the same thing.

It's not just a top-down approach...



It's reaching out across all levels

Look for your champions in every tier of the business

Internal Stakeholder Tiers:

- Board of Directors
- Office of the CEO
- Executive Leadership Team
- Corporate Services/Admin Teams
- Operational/Service Delivery Teams
- Fundraising & Marketing Teams

Don't just focus on top-down support, the support you need may look different to each level.

Make sure each area understands how they can support you in their own way.

Know your audience



- Use those active listening skills!
- Spend time getting to know all levels of the business before you ask for their support
- Find out what each level needs to hear to get behind your idea
- Ask what concerns they have to anticipate where you might meet resistance

Perfect your Elevator Pitch

Your elevator pitch needs to:

1. Introduce yourself and your program
2. Summarise what you want to do
3. Explain what you need from them
 - a. Include how it can be mutually beneficial
4. State your call to action



Perfect your Elevator Pitch

Things to also consider:

- Be clear and customise it to the audience
- Be mindful of different personality types in your approach and delivery
- Consider your timing in other areas of the business

**If needed, don't be afraid to state the risk if it's not supported.*



BREAKOUT ACTIVITY

- Get into groups
- Set a goal for your GiW program
- Pick 2 different stakeholder tiers
- Craft 2 custom elevator pitches,
1 pitch for each tier



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Start spreading the news



- Positivity is contagious
- If you demonstrate enthusiasm about your program, others will be more willing to hear about it
- Look for ways to talk about your goal with your colleagues in casual settings and conversations
- Openly talk about important milestones in your program

Be a myth buster where you can



- Not everyone will understand the value of GiW's, address misconceptions
- Educate, don't reprimand
- Not everyone will feel confident or comfortable talking to GiW supporters
- Make the time to provide extra briefings or dry runs before important events

Prepare to get personal



Meet your colleagues: Cristina Caamano

ro319.sharepoint.com

Meet Cristina Caamano. Cristina is the Gift in Wills Senior Coordinator for the RFDSSSE fundraising Team. Before working at the RFDS, what was the most unusual or interesting job you've ever had? "Definitely, my most interesting job was when I was



Hear your colleagues Gift in Will story - Cristina Caamano

ro319.sharepoint.com

It was December 2021, I was 8 months pregnant with our first child, and my husband and I were anxiously waiting in our solicitor's office wondering how long our appointment would take to sign our newly created Wills.



Christmas with the Flying Doctor

ro319.sharepoint.com

Gift in Wills Senior Coordinator, Cristina Caamano, loves everything about an Aussie Christmas!

Prepare to get personal

- Be approachable and reach out to the introverts.
- Use your internal comms to introduce yourself.
- If you want people to be more comfortable talking about GiW's, give them a chance to get comfortable with you first.
- Tell your own estate planning stories and embrace the humour where you can.
- Let them know you're available for a confidential chat and cuppa.

Find ways to humanise your supporters

Meet our inspiring supporters



Dr Sandra L J Johnson

I believe that this allows me to leave a legacy to support a service that I believe in and which relates directly to my chosen and beloved career. Medicine. I believe in a fair society. One's location or position in life should not be the factor that determines whether one receives good healthcare. Every human being has the right to be cared for and to be given treatment when they are sick or injured."

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Eric Tanner

"People who live out there face great hardships. The Flying Doctor providing that mantle of safety, an survive. Keeping an aircraft running is very hard. Flying Doctor Service needs all the help it can get."

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The generous gift that helped us respond to Covid-19

DATE PUBLISHED
21 Aug 2023



At the Royal Flying Doctor Service (South Eastern Section), we are truly grateful for our caring and generous supporters across Australia.

Tarlie and John will leave a lasting impact with the Flying Doctor

DATE PUBLISHED
13 Oct 2020



Gifts in Wills have the potential to provide vital medical equipment, specialist training, and essential healthcare services to remote communities. Tarlie and John Alcock want to continue their invaluable support for the Flying Doctor for generations to come.



Find ways to humanise your supporters

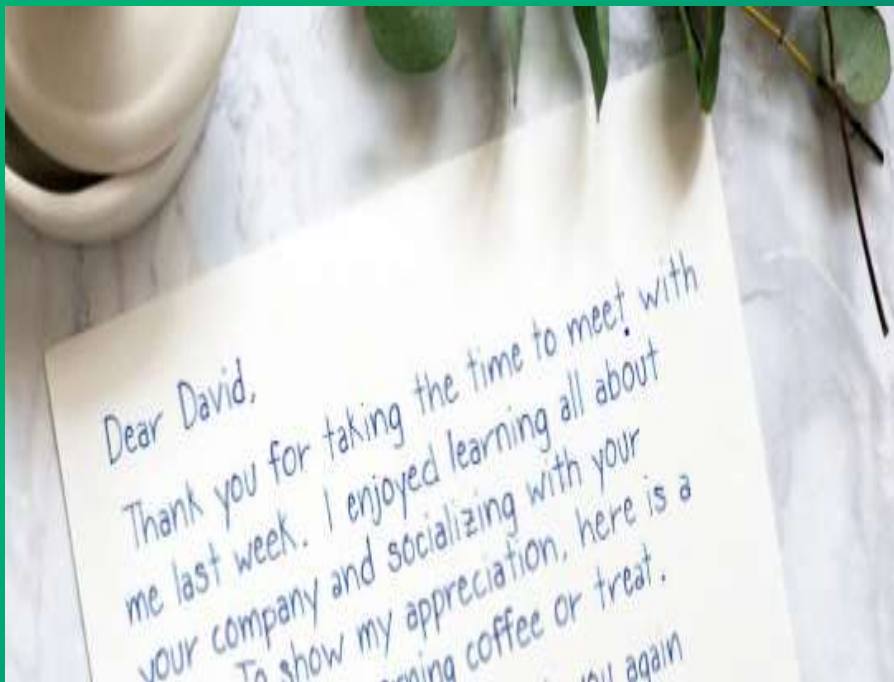
- Create your own slow-drip campaign through internal comms, tell living and deceased bequest stories.
- Find things that are unique about your audience and make their demographics common knowledge.
- Talk about bequests received in your team meetings and give relatable details about the individual supporters.
- Share photos where possible from events you've held and obituaries of realised bequests.

Ask for feedback and show you're listening

- Try to find ways of working that reduces negative impact to other teams
- Acknowledge that you're not the expert in all areas of the business
- Buy-in is not one-size fits all
- Be receptive to feedback from other teams



Report back and thank them personally



- Take the time to thank individuals for their support
- Handwritten thank you notes or short emails can go a long way
- Recognise their efforts and give small shout outs in front of other teams

It takes a village...



Give credit where it's due!

A GIW program success is always the result of a wider team effort.

Continuously celebrate the team's collaborations in your wins.

People are more willing to support your initiatives if they feel their efforts will be appreciated.

When all else fails...

Bribe them with chocolate!





ENCOURAGE-MINT

**Good luck
out there!**



**INCLUDE
A CHARITY**
Make your mark



Fundraising
Institute
Australia

The Professional Body for Australian Fundraising

www.fia.org.au

Thank You

Wednesday 25th October 2023