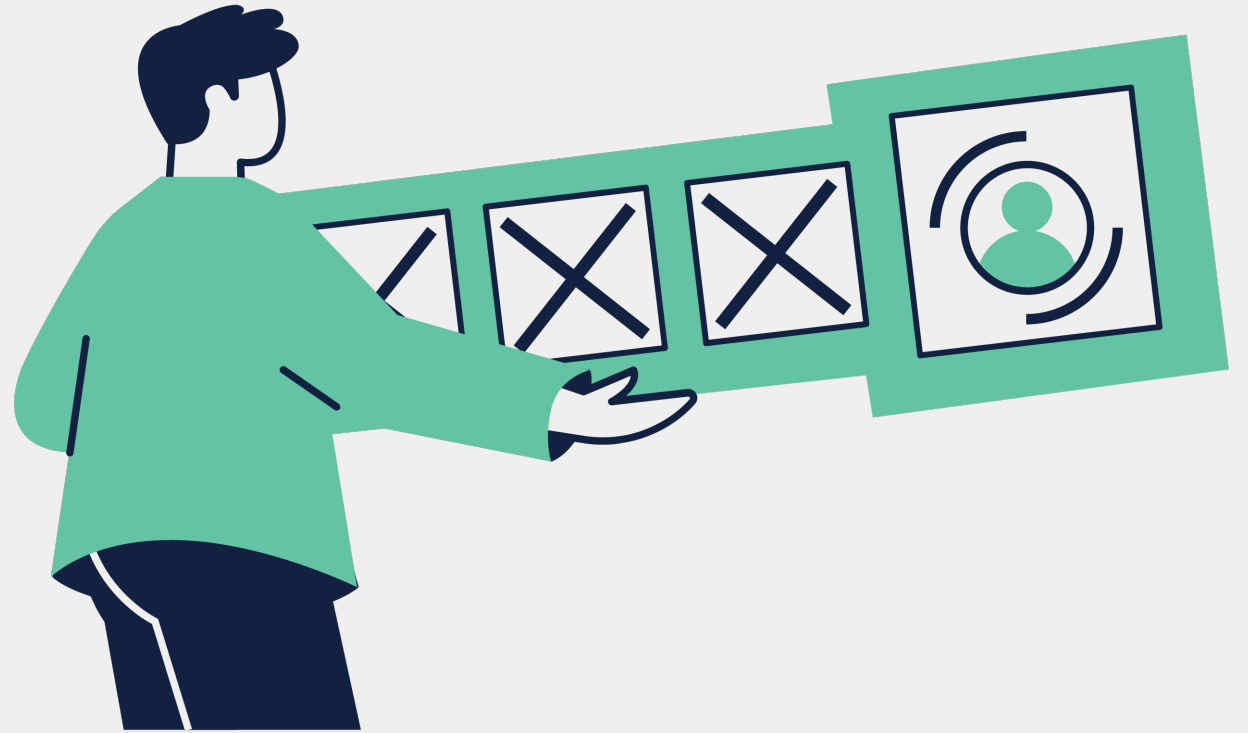


Smoothing Pathways: Why Cleansing Data Entry in your CRM Pays Dividends





Angie Shum
Heart Foundation



Morgan Koegel
Bequest Assist

Why does clean data matter?



- Accurate pipeline
- Saves time and resources
- Reduce costs
- Income forecast
- Better supporter experience



From a deceased estate perspective

- Improve future bequest prospecting
- Receive your full entitlement
- Missing gifts
- Save time!

Understand your bequestors:

- Profile – location, gender, etc
- Relationship to the charity
- Other charities you track with



▼ BEQUESTOR DATA

Was the Deceased Known or Unknown?	<div><div>i</div>Known</div>	<div><div></div></div>
Charity Estate ID		<div><div></div></div>
If Donor Start Date	3/6/1992	<div><div></div></div>
If Donor End Date	21/3/2023	<div><div></div></div>
Donor Value (Lifetime)	\$18,840.95	<div><div></div></div>
If Beq Date First Confirmed	<div><div>i</div>2/9/2004</div>	<div><div></div></div>
Source if Supporter	Unknown	<div><div></div></div>




Supporter Address



Charity Supporter ID	<div><div>i</div></div>	<div><div></div></div>
Relationship to Charity	<div><div>i</div>Donor;Confirmed Bequestor;Regular Giver</div>	<div><div></div></div>
If Other Relationship Description	<div><div>i</div></div>	<div><div></div></div>
If Donor Number of Donations	304	<div><div></div></div>
Donor Value (Highest)	\$500.00	<div><div></div></div>
If Beq Date Last Confirmed	<div><div>i</div>18/9/2012</div>	<div><div></div></div>
Source If Bequestor	<div><div>i</div>Supporter Survey</div>	<div><div></div></div>

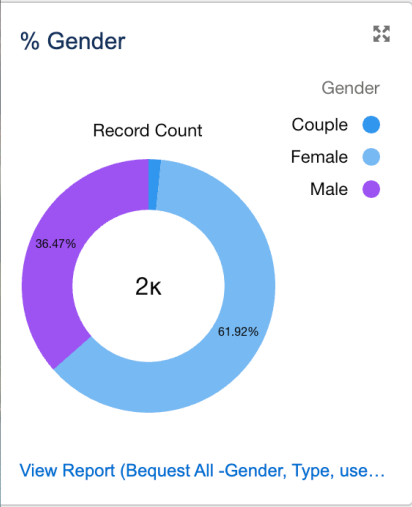
Recognition Detail

None Discussed/Listing in annual report

▼ BEQUESTOR PROFILE

Gender	Male	
Marital Status	Single	
Internet Search Completed	<input checked="" type="checkbox"/>	

Date Of Birth	2/11/1947	
Children	No Presumed	

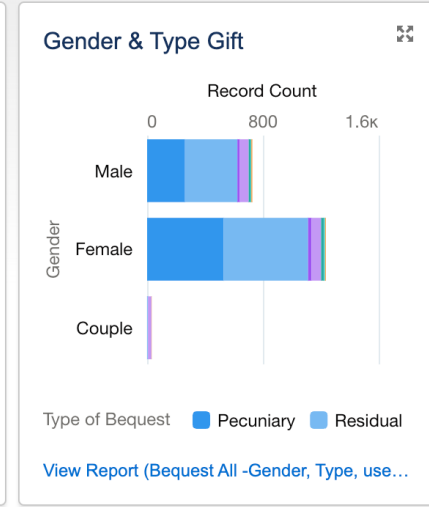
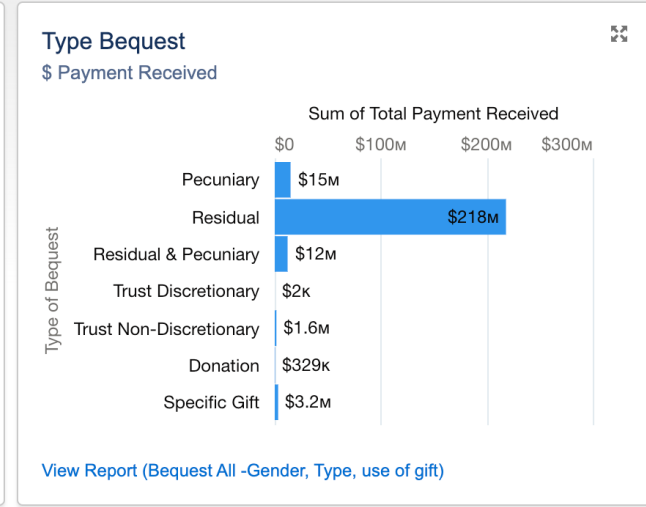
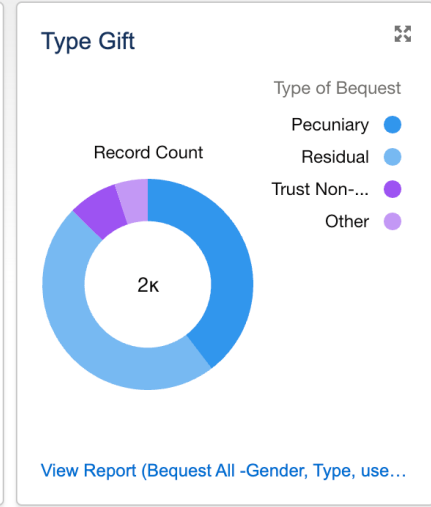


Amount by Gender

Bequest Closed

Gender	Sum of Total Payment Received	Average Total Payment Received	Record Count
Couple	\$5.00M	\$1.00M	5
Female	\$104.33M	\$110.76k	942
Male	\$76.88M	\$150.16k	512
Total	\$186.22M	\$127.64k	1459

[View Report \(Bequest All -Gender, Type, CLOSED\)](#)

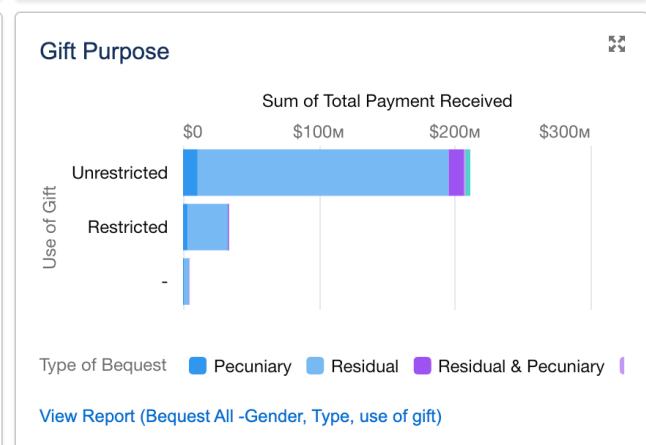


Average Type \$ Amount

Bequest Closed

Type of Bequest	Average Total Payment Received
Pecuniary	\$18.51k
Residual	\$240.79k
Residual & Pecuniary	\$424.39k
Trust Discretionary	\$0.00
Trust Non-Discretionary	\$204.23k

[View Report \(Bequest All -Gender, Type, CLOSED\)](#)



Commissions Allowed

Commission Allowed per Will	Record Count
Commission Allowed per Will	265
Commission Not Allowed per Will	56
Other	7
Will Silent	1738
Total	2066

[View Report \(Bequest All -Commissions\)](#)

Legal Fees by Estate size

Size Estate	Average Legal Fees % of Estate	Record Count
Up to \$300K	6.51%	78
\$300K - \$1 Mill	2.12%	155
Over \$1 Mill	1.08%	148
Total	2.61%	381

[View Report \(Bequest All -check known and state\)](#)

Law firms

Law Firm	Record Count
Executor	279
Other	1376
Private Trustees	155
Public Trustees	256
Total	2066

[View Report \(Bequest All -Will, states, Law firm\)](#)

Age Bequestor at death

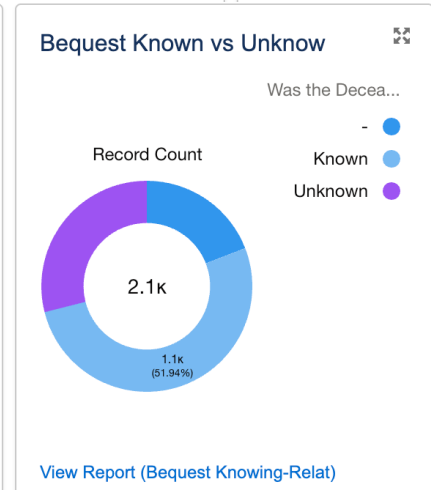
Age Bequestor	Sum of Total Payment Received	Average Total Payment Received	Record Count
a) 100 + years	\$3.48M	\$217.45k	16
b) 90 + Years	\$24.34M	\$90.81k	268
c) 80 + Years	\$41.43M	\$140.45k	295
d) 70 + Years	\$17.41M	\$106.18k	164
e) Less than 70 Years	\$19.33M	\$224.71k	86
N/A	\$148.00M	\$119.64k	1237
Total	\$253.99M	\$122.94k	2066

[View Report \(Bequest All -Age\)](#)

Age Testator

Age testator	Record Count
a) 100 + years	3
b) 90 + Years	123
c) 80 + Years	289
d) 70 + Years	220
e) Less than 70 Years	153
N/A	1278
Total	2066

[View Report \(Bequest All -Age Testator\)](#)

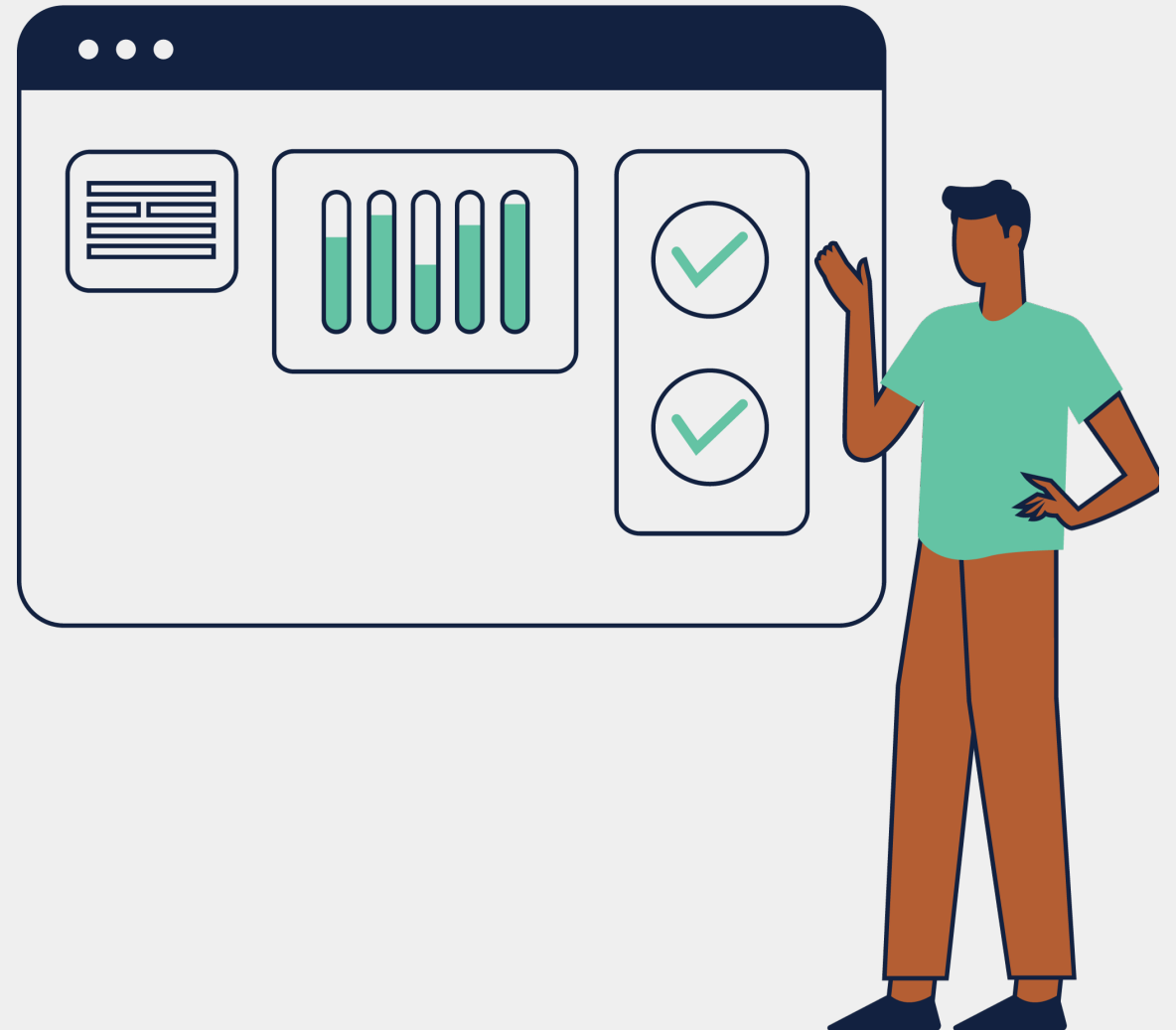


Relationship to Charity

Was the Deceased Known or Unknown?	Relationship to Charity	Record Count
-	-	391
-	Donor; Confirmed Bequestor	2
-	Donor; Patient / Service User	1
-	Other	1
Known	-	92
Known	BQ-Considerer	1
Known	BQ-Declined; Member	1
Known	BQ-Declined; Regular Giver	2

What does clean data look like?

- Current



1 Opportunity

+ Add opportunity

☐ Include inactive

Any status

...

Sample Bequest

Bequest

Ms Angie Shum

BQ-Confirmed (106 days)

▼

Actions

8 Actions

+ Add action

Any action type

...

Phone call - Case Study

15/07/2024

GIW-TestimonialList-PH-24

▼

...

Phone call - Bequest - Status Re-Qualified

20/05/2024

GIW-REQUALlist-PH-24

✓ 20/05/2024

▼

...

Mailing - Bequest - Donor Letter

05/02/2024

GIW-INTC-PH-24

✓ 05/02/2024

▼

...

Phone call - Solicit Code Change

05/02/2024

GIW-INTC-PH-24

✓ 05/02/2024

▼

...

Phone call - Bequest - Move Up

05/02/2024

GIW-INTC-PH-24

✓ 05/02/2024

▼

Updated 61 minutes ago

0 years giving

A\$0 gifts received

0 years consecutive

+ A\$0 committed

+ A\$0 soft credits

= A\$0 lifetime giving

Giving history

Date	Amount	Type	Fund
No gifts found			

Solicit codes

Edit

Do Not Solicit Via Phone

20/05/2024 - Present

No Christmas Appeal

20/05/2024 - Present

Appeal

Find in this list

Q

Appeal description	Appeal category	Comments	Date	Finder number	Mailing id	Marketing segment	Ma
--------------------	-----------------	----------	------	---------------	------------	-------------------	----

Opportunity status history

<div>...</div> <div>BQ-Confirmed</div> <div>Last updated by Dean Watson</div> <div>GIW-INTC-PH-24</div>	<div>05/02/2024</div> <div>106 days</div>
<div>...</div> <div>BQ-Intender</div> <div>Last updated by Dean Watson</div> <div>GIW-INTC-PH-24</div>	<div>01/08/2023</div> <div>188 days</div>

Solicit codes

Edit

- Do Not Solicit Via Phone
- No Christmas Appeal

Custom fields

<div>⊕ Add</div> <div>↕ Sort ▾</div>	<div>Any category ▾</div>
<div>...</div> <div>Acquisition Source</div>	<div>Bequest ▾</div>
<div>...</div> <div>Connection to Cause</div>	<div>Yes, I have a family member with heart disease ▾</div>
<div>...</div> <div>Will Status - Has a Will</div>	<div>Yes ▾</div>

...

Phone call - Case Study

15/07/2024

GIW-TestimonialList-PH-24

^

Note Text

Call after the financial year - mid July Mr Sample has agreed to answer some questions and take part in the HF GIW Case Studies. He would like to share his journey of how he decided to leave... [See more](#)

Opportunity

Sample Bequest

Direction

Outbound

Assigned to

Ms Angie Shum

...

Phone call - Bequest - Status Re-Qualified

20/05/2024

GIW-REQUALlist-PH-24

✓

20/05/2024

^

Note Text

Called Mr Sample to thank him for mailing through confirmation of his GIW to the HF. He said that he was more than happy and the HF is in his Will as it is a good cause. ... [See more](#)

Direction

Outbound

Assigned to

Mr Dean Watson

...

Mailing - Bequest - Donor Letter

05/02/2024

GIW-INTC-PH-24

✓

05/02/2024

^

Note Text

Mailed Mr Sample the HF GIW move to Confirm letter as signed by David Lloyd.

Direction

Outbound

Assigned to

Ms Angie Shum

...

Phone call - Solicit Code Change

05/02/2024

GIW-INTC-PH-24

✓

05/02/2024

^

Note Text

During the Move to Confirm conversation Mr Sample requested no christmas Appeal mailing and although happy to hear from the GIW team to discuss his Will he does NOT want calls asking for donations. ... [See more](#)

Direction

Outbound

Assigned to

Ms Angie Shum

...

Phone call - Bequest - Move Up

05/02/2024

GIW-INTC-PH-24

✓

05/02/2024

^

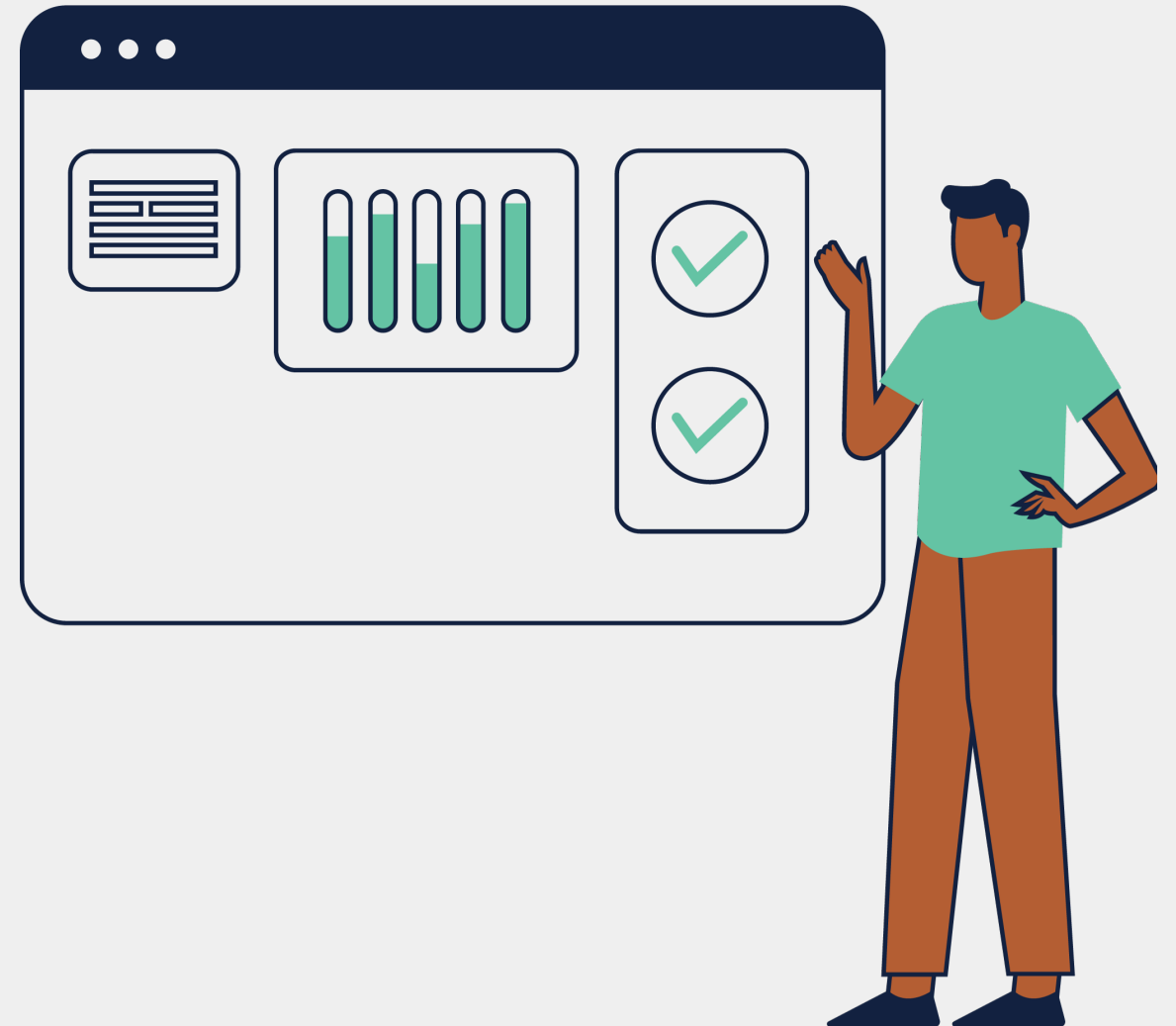
Note Text

Mr Sample said that he had only two weeks prior visited his solicitor and updated his Will. He said that he had referenced the HF GIW brochure and has made a residual gift of 20% to the HF. He... [See more](#)

Direction

Outbound

- Current
- Updated regularly
- Clear definitions

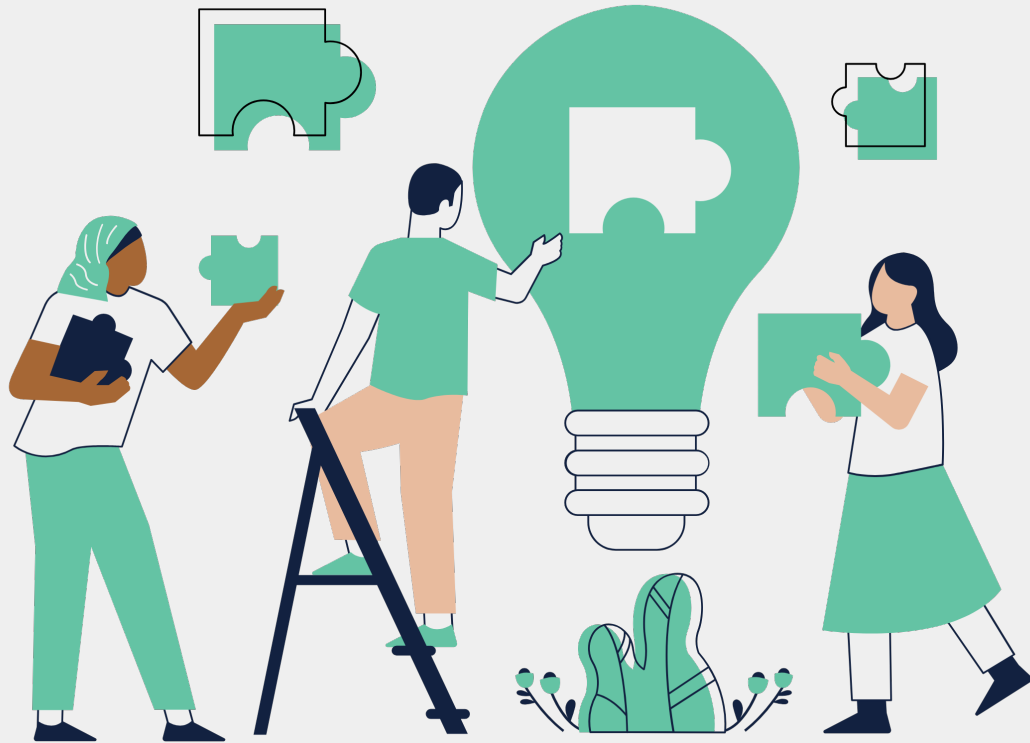


*Eg. Intender - Anyone who has expressed that they are intending leaving a gift to the Heart Foundation in their Will and/or has requested for information on how to complete the process **within the next 0-12 months** or when they next update their Will.*

Two categories of data for GIW:







- Donor information
- Deceased estate management









- Name of the deceased
- Name of the executor
- Name of the solicitor
- Date of death
- Date of probate
- Date of expected distribution
- Info on assets
- Info on issues with estate (eg contest)

▼ NOTIFICATION DATA

Notification Date	3/11/2023		Main Contact	Lawyer	
Lawyer/Trustee Name	Matthew Scott		Lawyer/Trustee's Estate ID	 MS:230120	
Lawyer/Trustee Email	info@clarkebarwood.com.au		Lawyer/Trustee Phone	03 5231 5155	
Law Firm/Trustee	Clarke & Barwood Lawyers		Law Firm/Trustee Phone	03 5231 5155	
Law Firm/Trustee Address	61-65 Gellibrand Street Colac Vic 3250 Australia		Lawyer/Trustee 2 Email		
Lawyer/Trustee 2 Name			Lawyer/Trustee 2 Phone		

▼ PROBATE DATA

Date of Probate	26/4/2023		Claims Period Expiry Date	26/10/2023	
Date of Death	22/2/2023		Deceased Address	2, 379 Autumn Street Newtown Victoria 2042 Australia	



1. How will you stop bequests from falling between the cracks?
2. How will you ensure that you match living donors to deceased bequestors?
3. How can you make your estate admin more efficient?

What are the consequences when
data isn't kept clean?

- Impacts supporter experience
- Challenges with linking gifts to records
- Unrealistic expectations

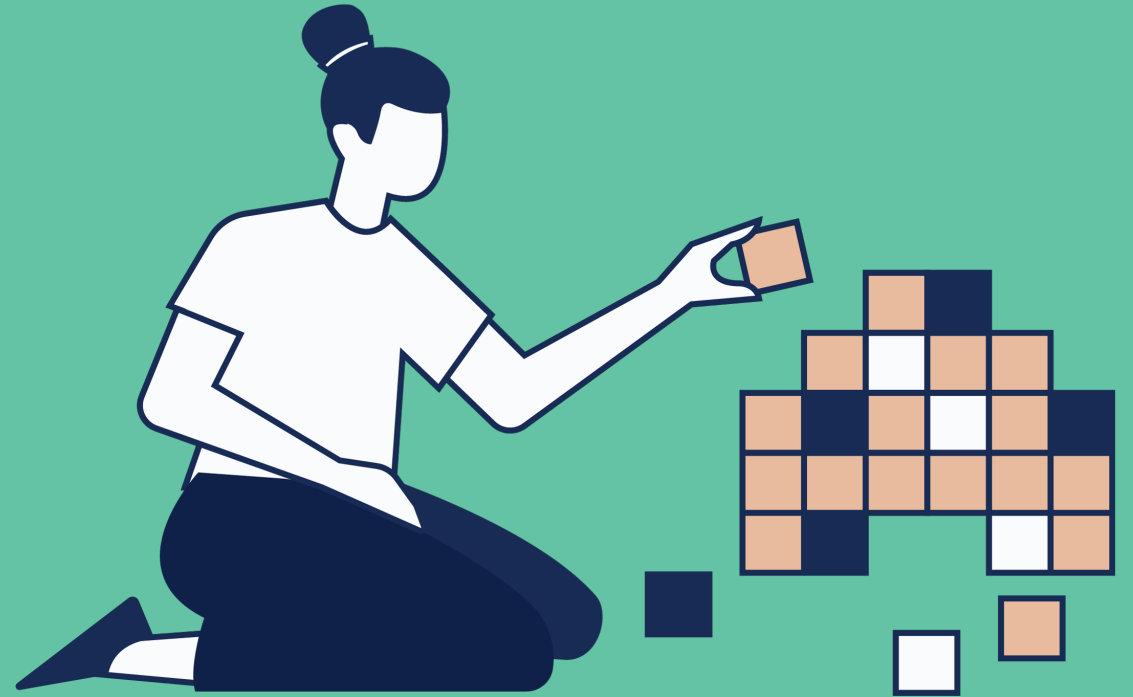




Take aways from Bequests Promised project:

- 1.5 years on average to realise bequestor was deceased
- Consistency in use of terms
- Data accessibility
- Lack of notes

**But you also have to make
use of good data...**





1. Determine which records you will track
2. Marking as deceased triggers process
3. Estate administrator checks for probate every six months
4. Reach out to solicitor or purchase will

Top tips for great data



- Be current
- Be brave
- Be honest

- Qualified vs unqualified
- Everyone on the same page about terms
- Storing data – GIW are a long game



Include A Charity and Bequest Assist 2023 Gifts in Wills Report

BEQUESTOR DATA ANALYSIS

**What 3,000 bequests tell us about the people
who leave them, and the effect on the future**

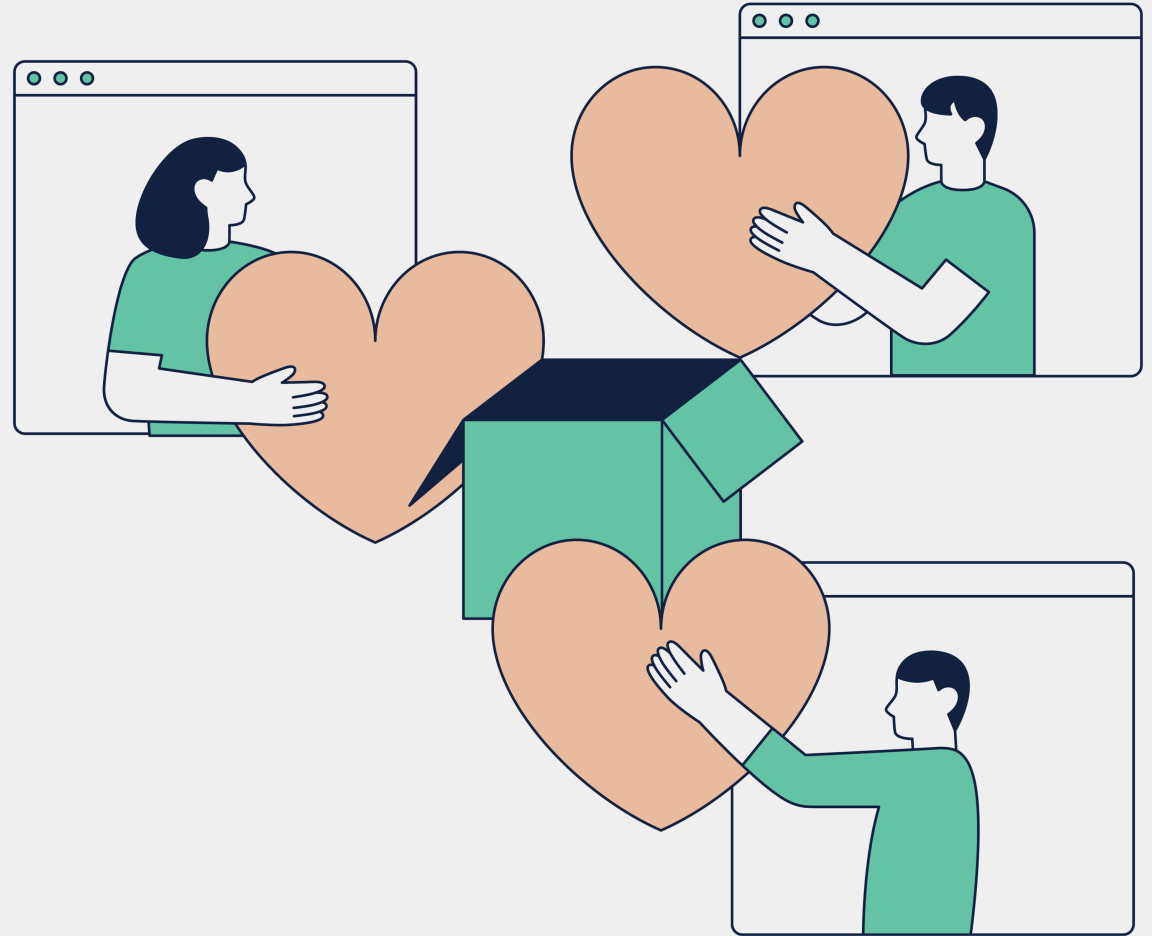


Bequest Assist

July 2023

Questions to think about:

1. How confident are you with your pipeline? Is it cluttered?
2. When was the last time you had an interaction with the supporters on your pipeline?
3. When did you last re-qualify their status?



Q and A



Breakout rooms:

1. What is working well with your data?
2. What is not working well?
3. What data do you collect for living donors as opposed to deceased estates?
4. Have you had any success navigating challenges with your data collection?