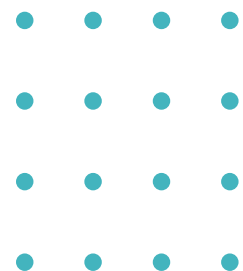


NOVEMBER 20, 2024

# Embracing digital to grow your GIW program

**BIGFOOT  
FUNDRAISING**



## INCLUDE A CHARITY

# ABOUT ME



- Commercial marketer (Telstra) turned fundraiser in 2009
- Launched Bigfoot Fundraising in 2018 to help for-purpose organisations make a bigger impact through better digital.
- Over the last 5 years have recruited over 10,000 bequest leads for charity clients - driving consideration, intention and confirmation through digital channels for charity clients - resulting in over \$40M+ in estimated future value.



# COMING UP . . .

- 1 Why digital for GIW?
- 2 Using digital to grow your GIW pipeline
- 3 Pillars of digital success
- 4 Digital GIW launch checklist
- 5 Success stories
- 6 Key takeaways





# WHY DIGITAL FOR GIW?

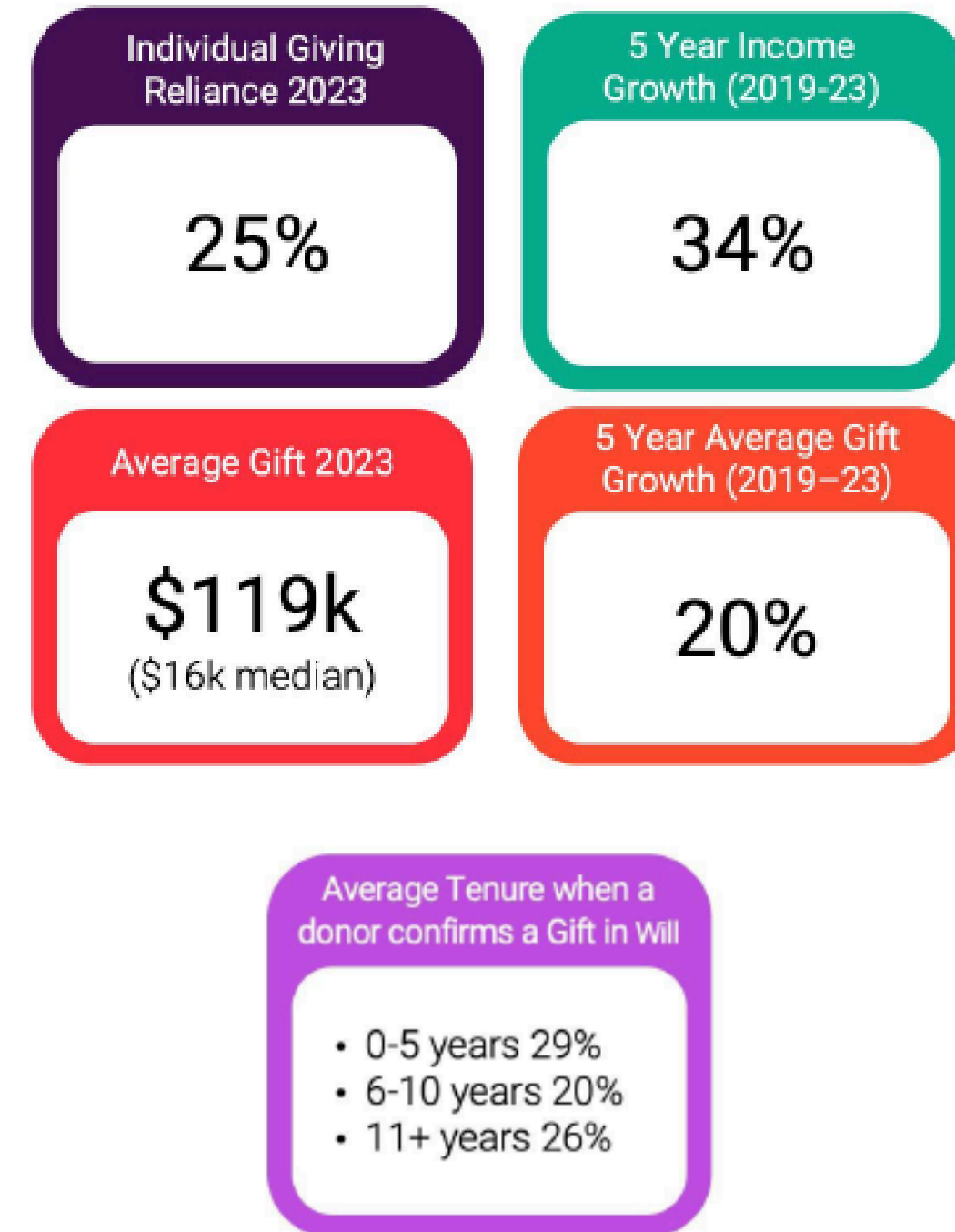




# WHY GIFT IN WILLS



- Bequest Fundraising is the most profitable area of Fundraising programs and brings in the most income across the charity sector. **Industry average ROI for this area is approx. 20:1**
- Gifts in Wills income accounted for **25% of Individual Giving Income in 2023.**
- **23% of Australians have considering leaving a gift in their Will.**
  - **Of these 3% will ‘definitely’ leave a gift in their Will and 13% will probably leave a gift in their Will.**
  - That’s a potential 2.6million Australians.
  - With the average gift in Will amount of \$119K, that’s over **\$3 billion in future GIW charity revenue!**



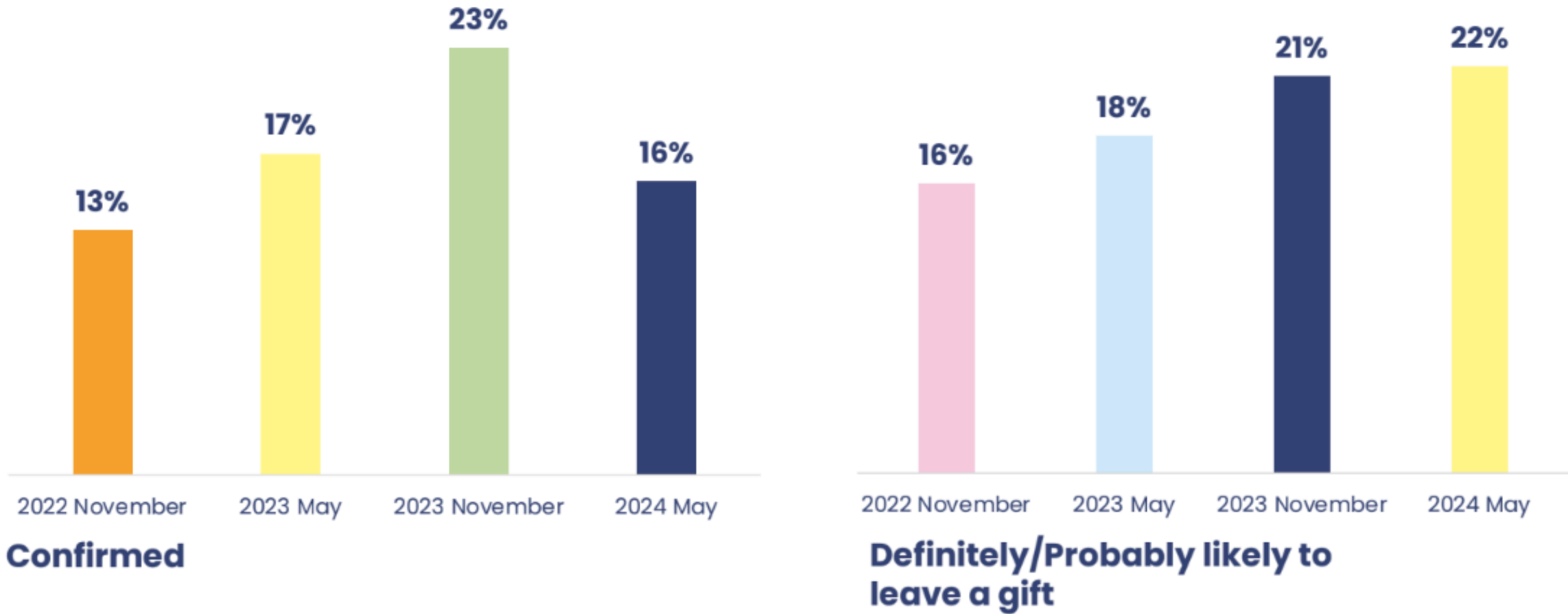
SOURCE: BENCHMARKING PROJECT, More strategic public survey

# GIW INTENTION IS ON THE RISE



## Gifts in Wills

The number of Australians confirming or **considering** a **GIW** in their Will is growing



Source: More Strategic 4 Rounds Report



# GIW AUDIENCES ARE ON DIGITAL



**Facebook** in particular is a strong channel to reach the gift in Will demographics

- A high proportion of older demographics are using Facebook - no longer a young person platform.
- 62% of internet users age 65 and older use Facebook
- 72% of 50- to 64-year-olds use Facebook

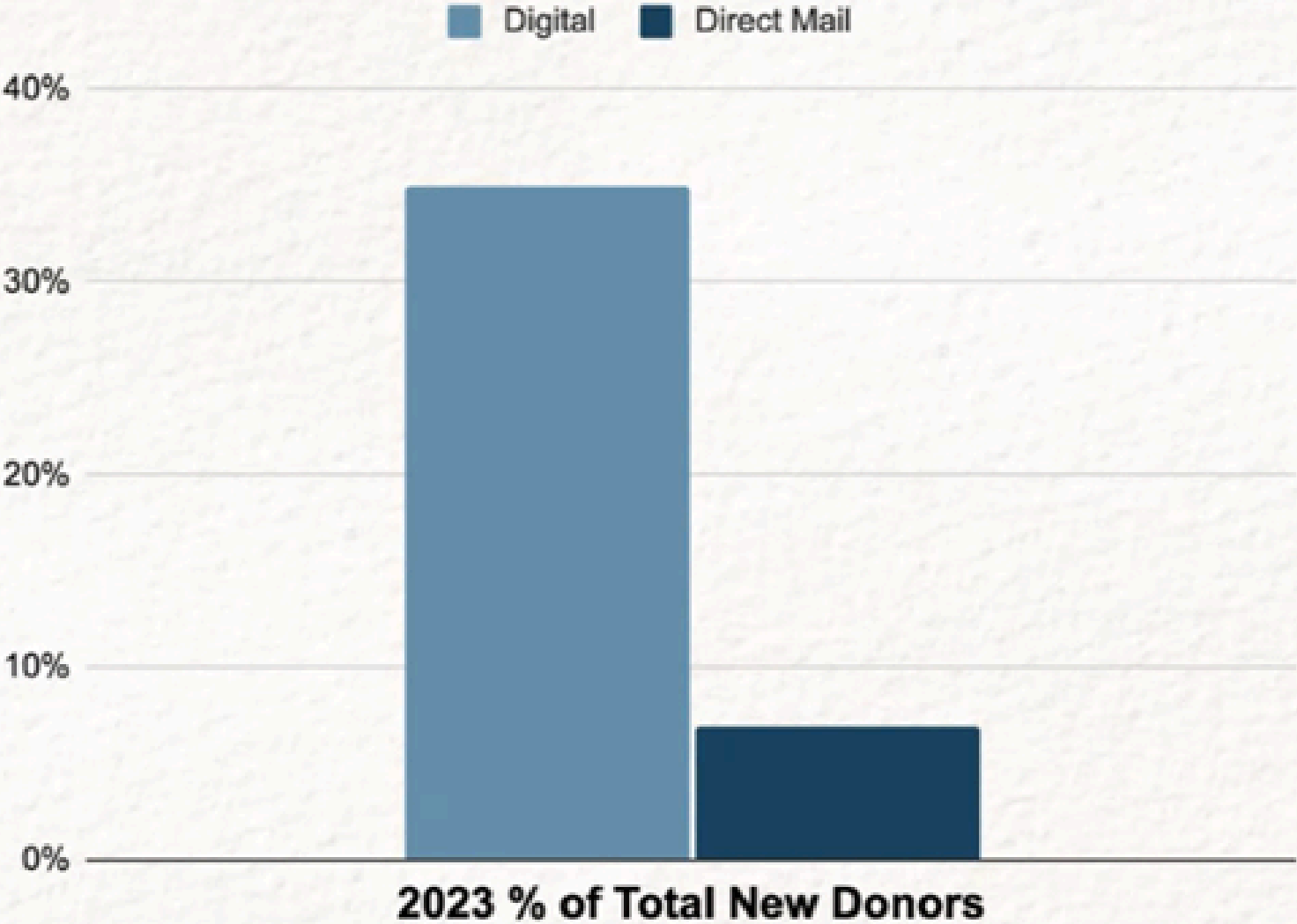


**Source:** PEW research centre

# DIGITAL IS DRIVING NEW DONORS



## 2023 Solicitation Channel Mix (Digital vs DM)

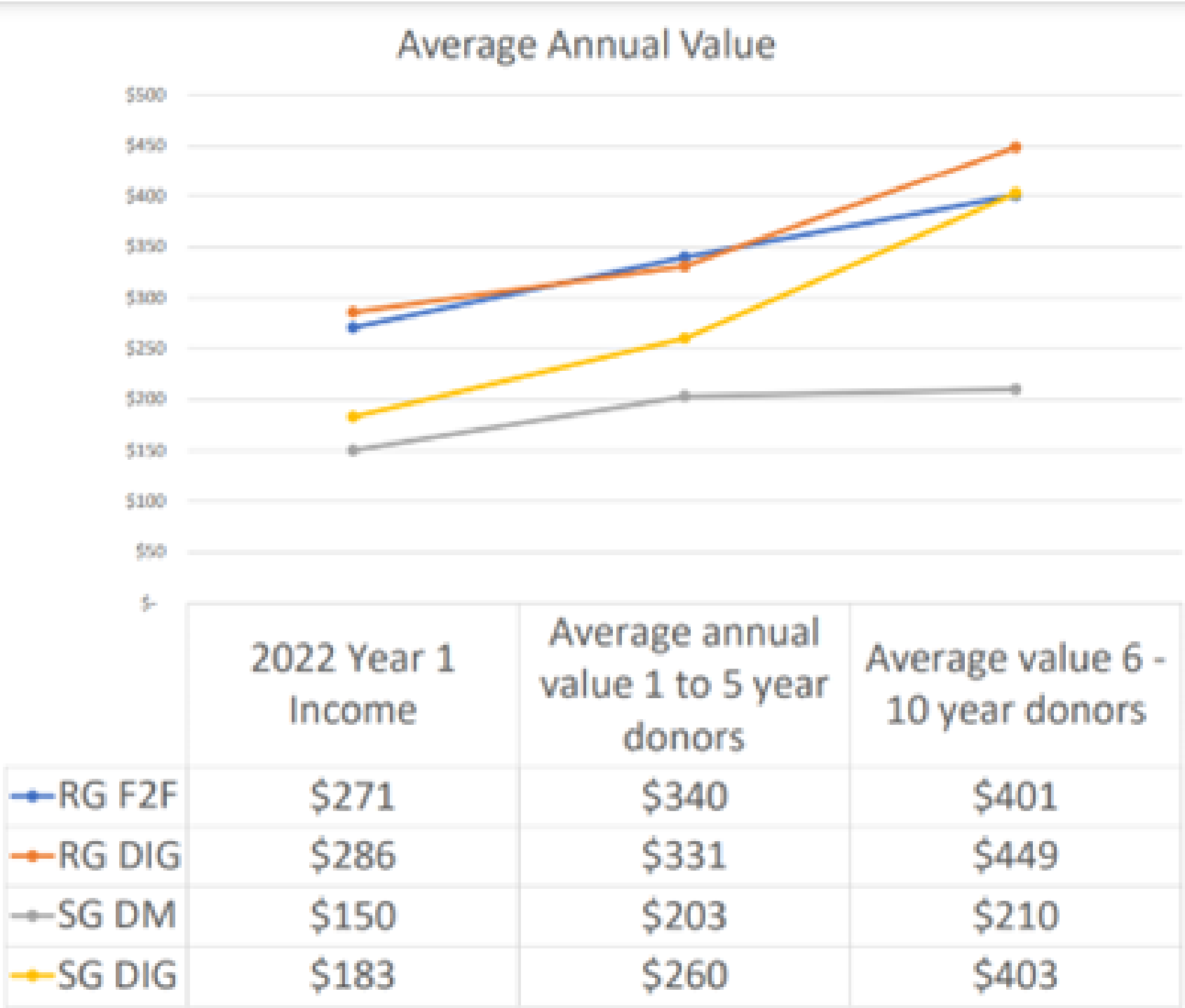


*Source: Australian Benchmarking Project*



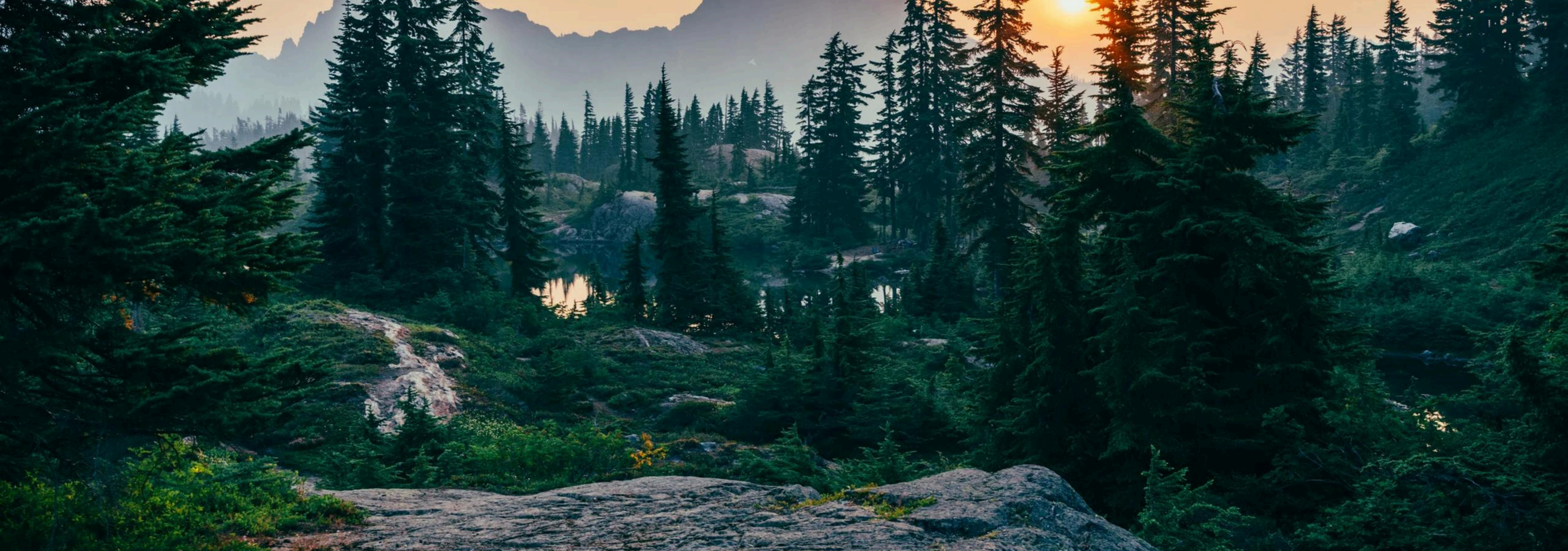
# DIGITAL DRIVES HIGHER LTV

This data shows that both SG and RG recruited digitally have a higher life time value.



Source: Australian Benchmarking Project



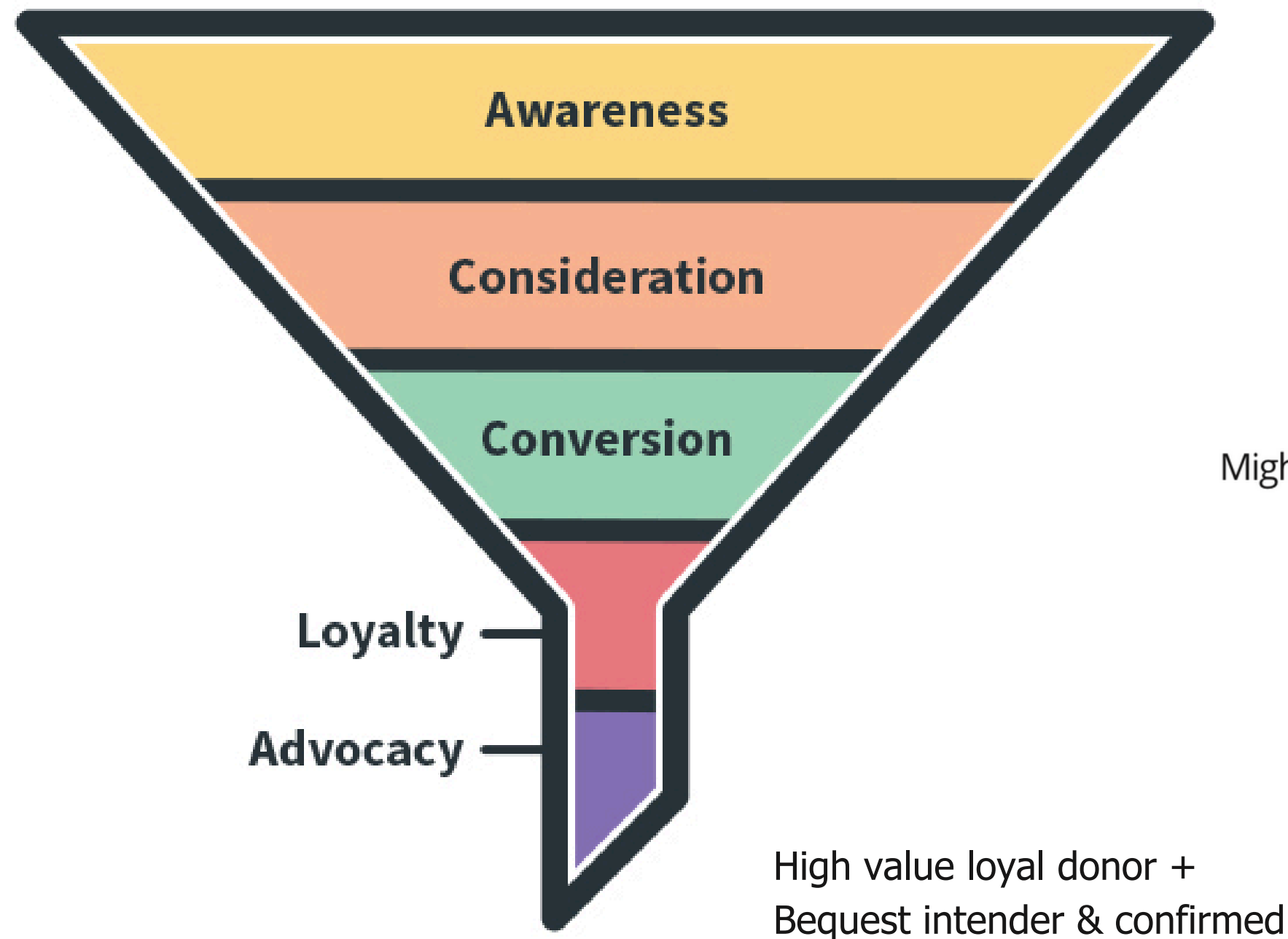


# USING DIGITAL TO GROW YOUR GIW PIPELINE





# FEED THE FUNNEL



  
Not exposed to your work

  
Might have engaged but not a donor

  
Current supporter



Feed the donor pipeline

Move people down the **engagement** funnel

Implement a mix of **top of funnel** and **conversion campaigns** to maximise digital engagement and conversions

# EXAMPLE CAMPAIGN GOALS



**Measurable and cost effective reach and engagement** of bequest content and advertising to feed the 'engagement funnel'.



**Insights into which Bequest messaging / propositions / content** resonates with your audience.



**Increase in the number of enquiries and GIW Considerers and intenders**



**Drive an increase in the number of enquirers, intenders, and confirmed people who have left a gift in their Will**



# DIFFERENT DIGITAL GIW CAMPAIGNS



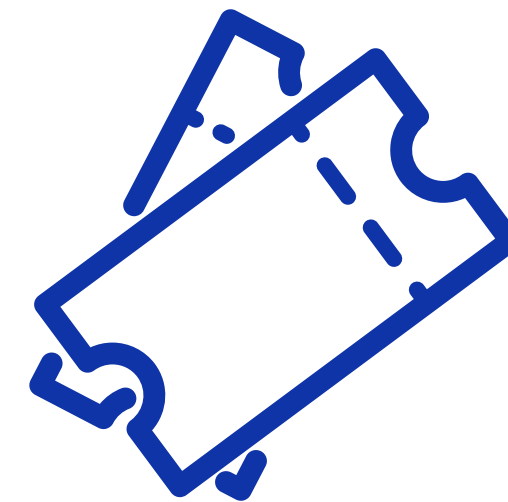
**Website  
Traffic/TOF  
Campaign**



**Facebook Leadgen  
Campaign**



**Bequest Survey  
Campaign**



**Registration  
Campaign for  
Events**



**Online Will  
Service  
Campaign**

# TOP UP YOUR FUNNEL OF BEQUEST PROSPECTS

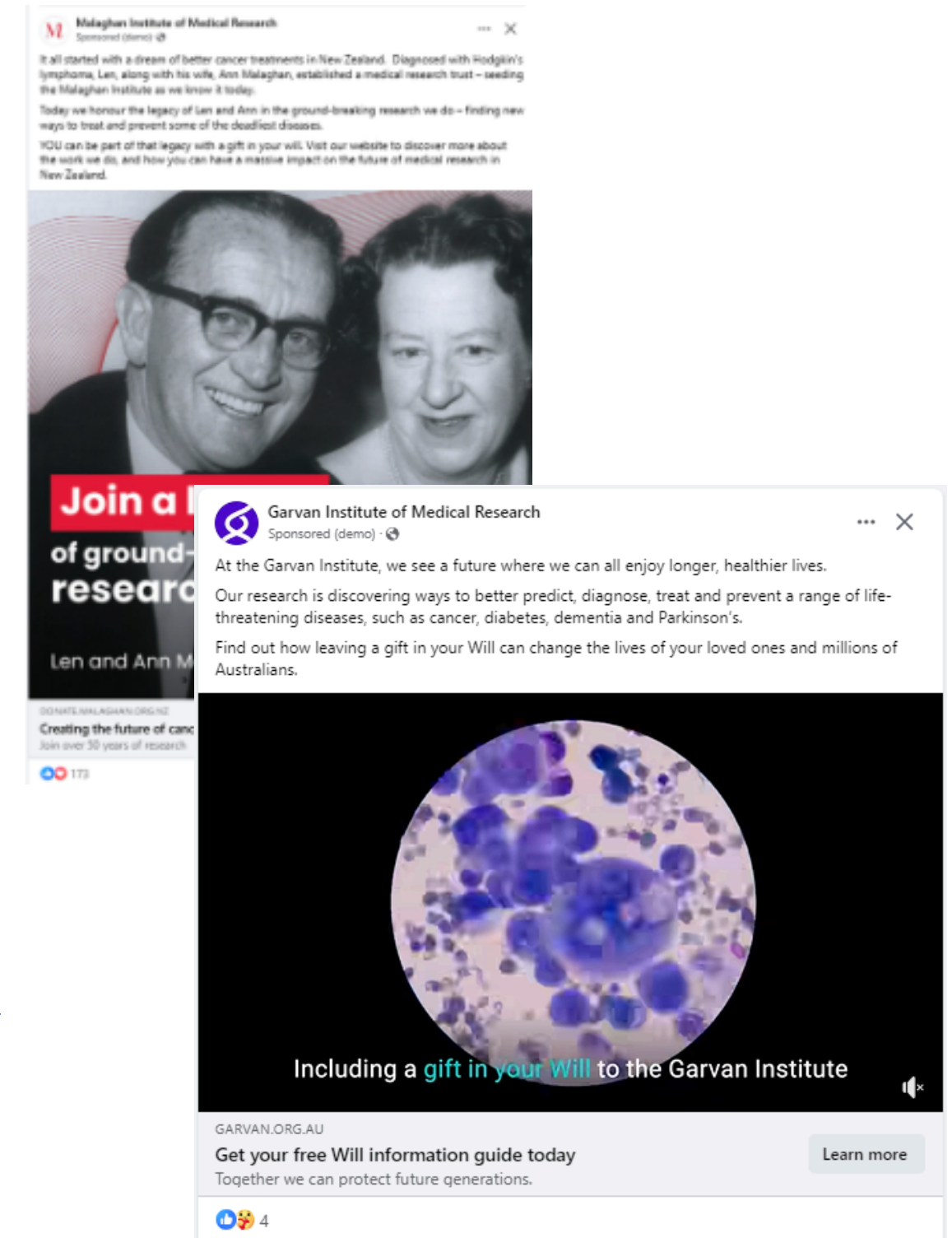
Drive more bequest prospects  
(prospects, considerers and intenders)

Create content that drives interest & engagement - *planting the seed*

Direct prospects to your **bequest / gift in Wills landing page** where they can learn more/download info, etc.

Promote **videos with authentic bequestor stories** and show the **impact of your work**, creating powerful engagement.

*Example: This Garvan ad alone generated over 380,000 video views*



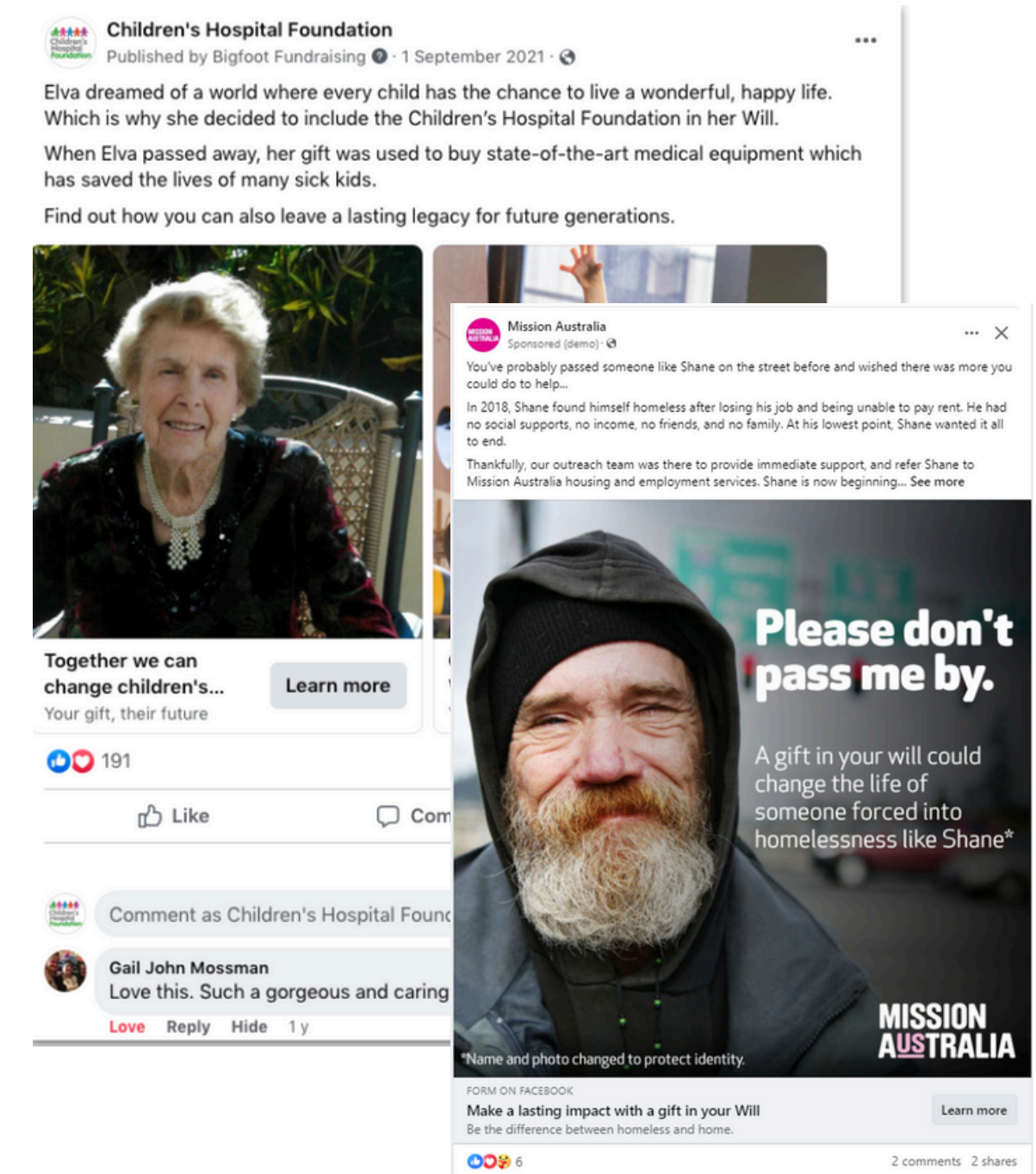


# GIW LEAD GENERATION

Engaged your existing supporters and bequest prospects to drive specific interest to your GIW program and confirmed bequests.

## Leadgen (Value Exchange)

Offer a bequest prospect something in return for their data -ie a **gift in Will guide**.



# GIW LEAD GENERATION



Facebook lead forms used to easily capture data and further qualify/engage.

**Test different lead forms to drive higher volume vs higher intent**

Using the 'Higher Intent' setting in Meta - adds additional disclaimers around how your contact information may be used and a review screen

Can add custom questions to further prime/nudge or qualify the GIW prospect

A screenshot of a Facebook lead form for Mission Australia. The form is titled 'Mission Australia' and features a close button (X) in the top right corner. The background image shows an elderly man and a young child smiling together. The form content includes the Mission Australia logo, the text 'Leave a gift in your Will to people in need', a confirmation statement 'Confirm your details and we'll email your free, no obligation gift in Wills guide.', and a description of the impact: 'With a gift in your Will to Mission Australia, you'll help assist struggling families and children, provide affordable housing, deliver homelessness prevention services and much more.' Below this is a question 'Are you interested in supporting homelessness services for Australians in need?' with a dropdown menu currently set to 'Select'. At the bottom is a blue 'Continue' button.



# GIW LEAD SURVEY



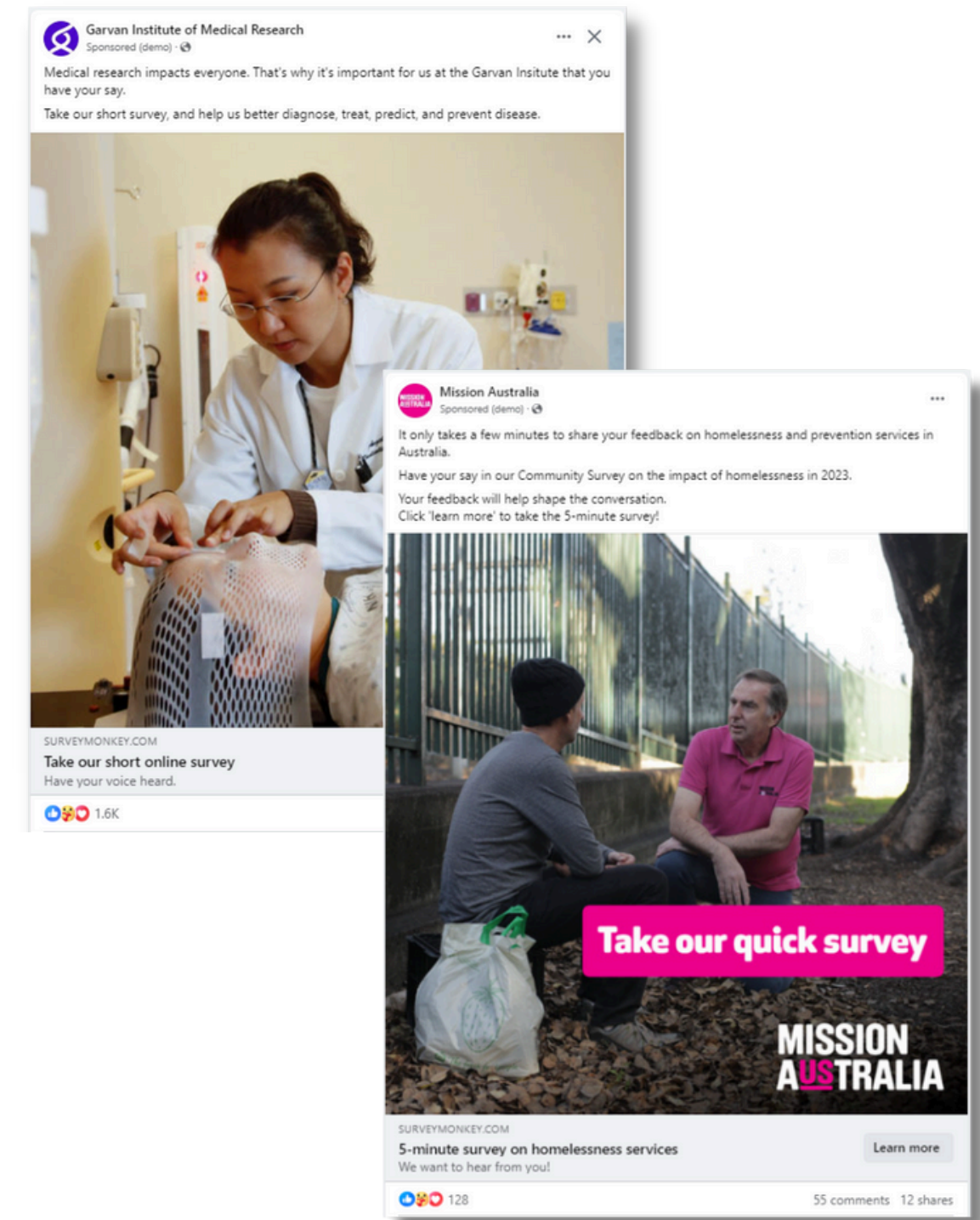
Engage your existing supporters and bequest prospects to drive specific interest to your GIW program and confirmed bequests

## Digital Survey

Understand your supporters and bequest prospects better by running digital survey that captures their information and asks their intent about leaving a gift in their Will.

Can adapt/repurpose your warm supporter survey.

Results of the survey can be shared with the new GIW prospects and information gathered should be useful for the brand and program teams.





# GIW EVENTS

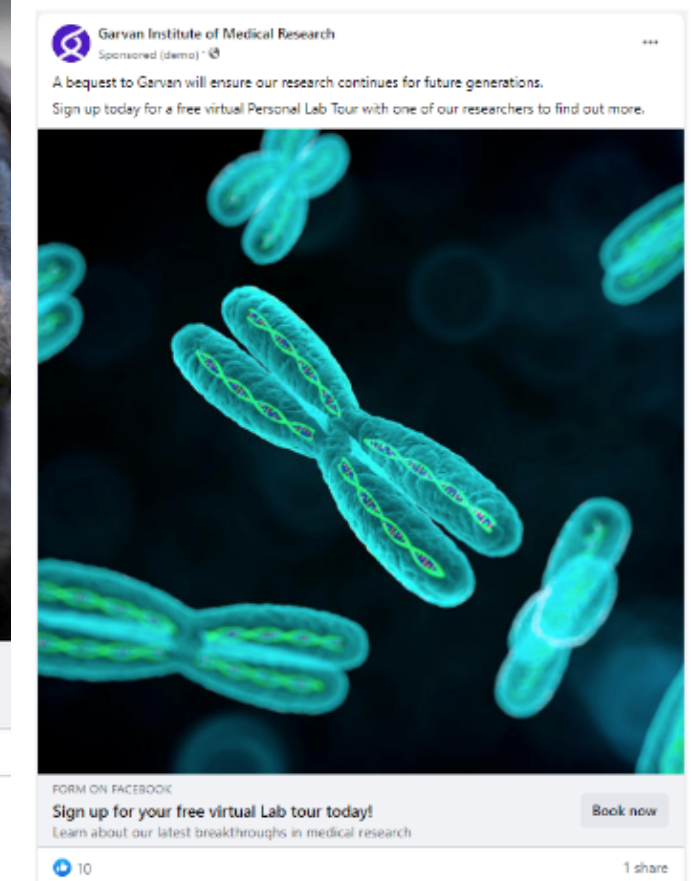
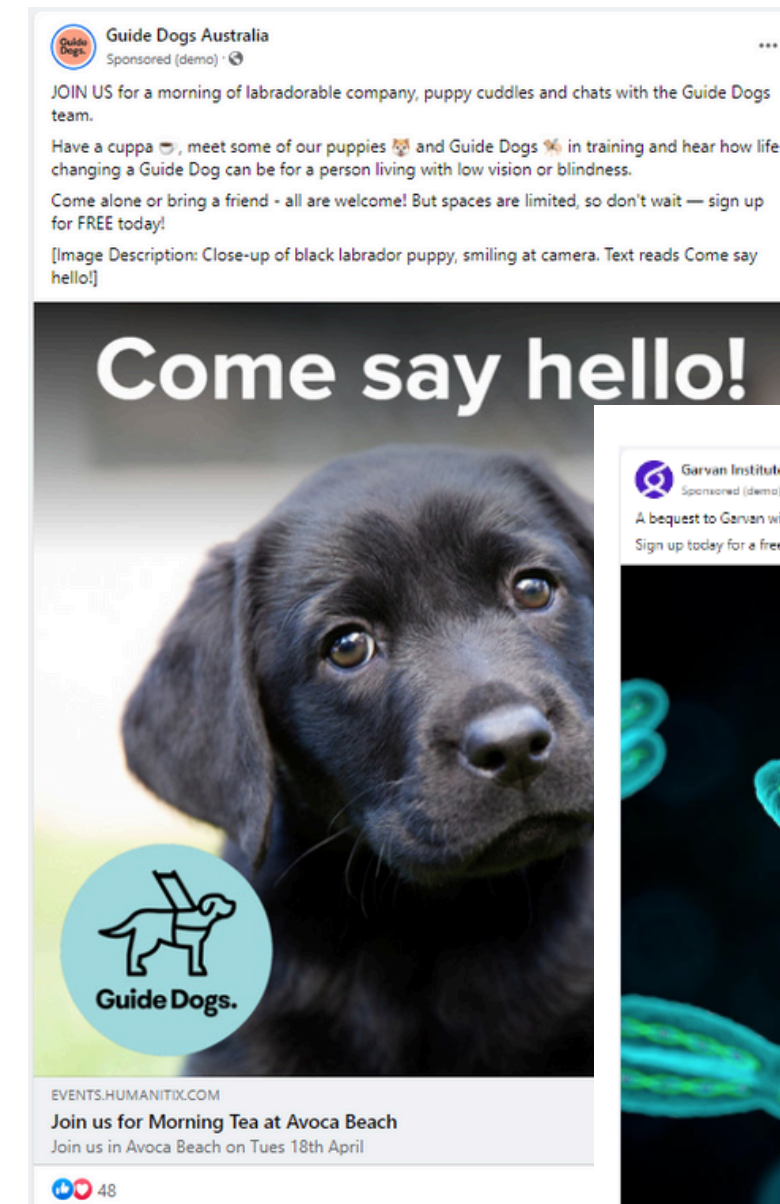
Engage your existing supporters and bequest prospects to drive specific interest to your GIW program and confirmed bequests

## Virtual and physical GIW events

Leverage social to promote virtual events or attending physical events. Eg;

- Tours of facilities
- Morning teas
- Webinars
- Q&A from staff

Can target your warm prospects or create very targeted campaigns in Meta to drive registrations (Lookalike audiences, geo-targeting etc)



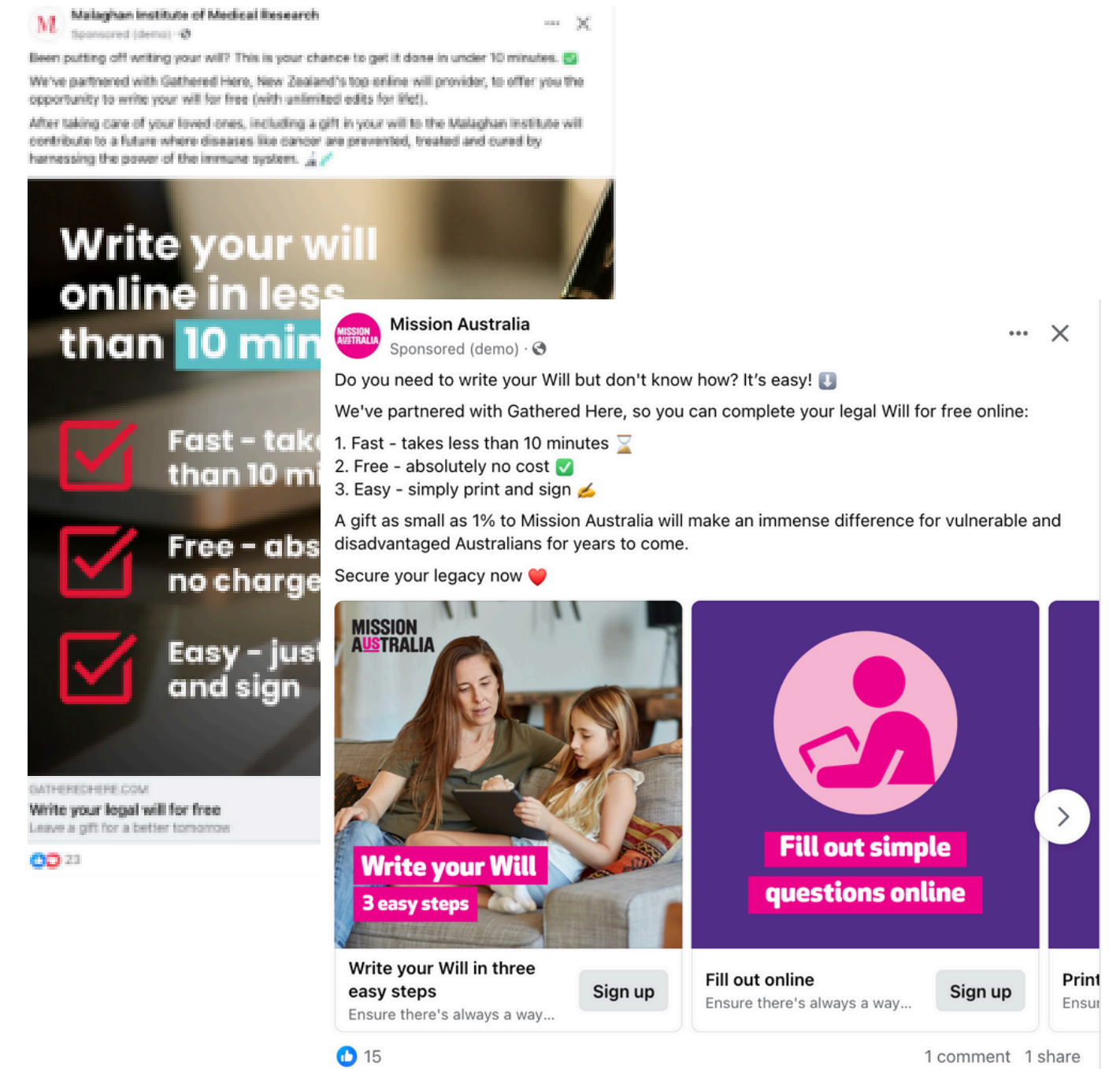
Example of GIW ad promoting Virtual Lab Tour

# GIW ONLINE PLATFORMS

Drive high intent leads straight to online will platforms such as Gathered Here, Willed or SafeWill, where they make their Will and hopefully leave a gift to your charity

## Online Will platform

Create an integrated digital push email, SMS, organic and paid social ads to promote creating your Will online and leaving a gift to your charity.

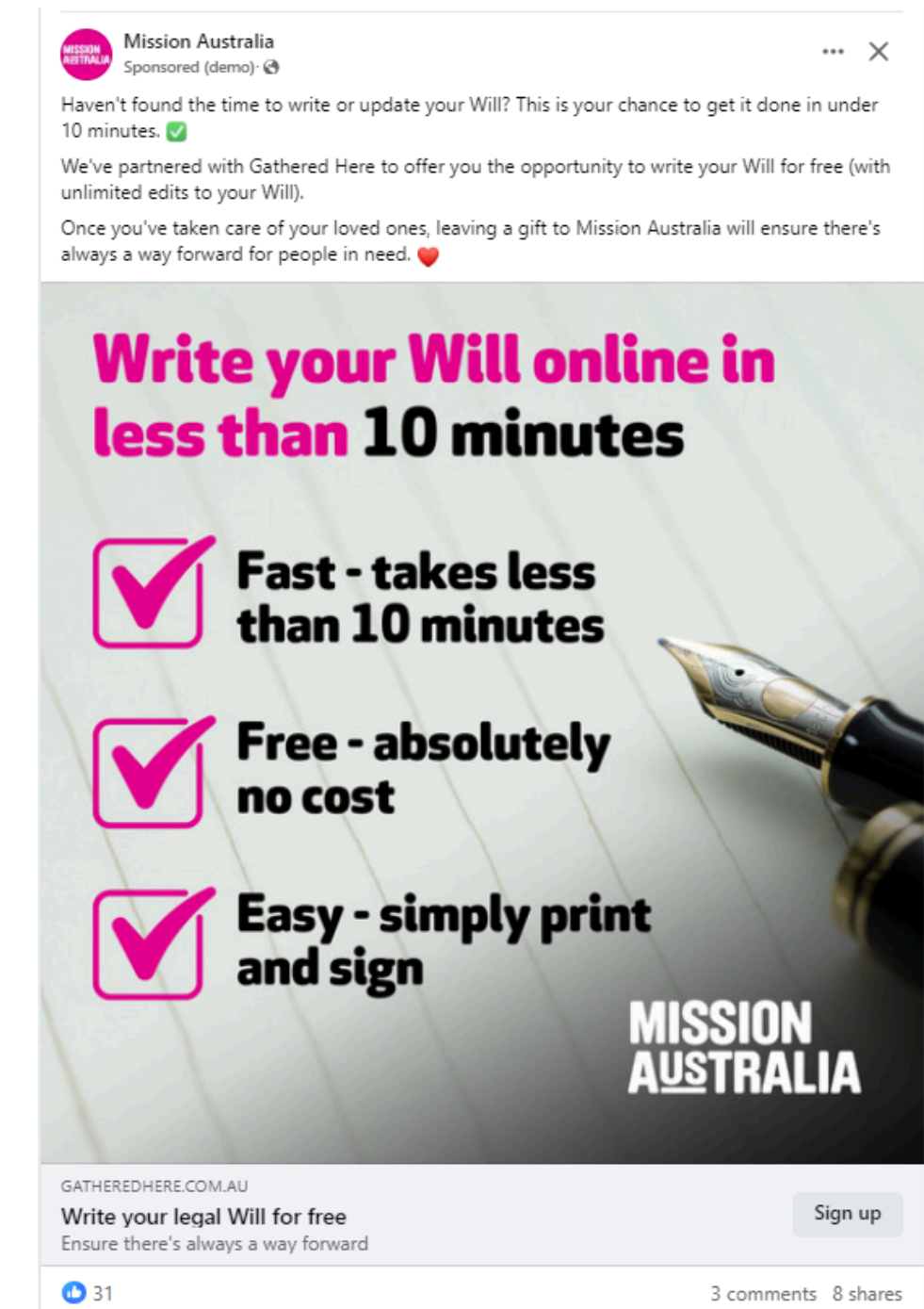




# ONLINE WILLS OPPORTUNITIES

## Ideas to promote Online Wills through your wider warm channels:

- Regularly include **QR / Digital Link** in supporter newsletters.
- Look to add a small GIW ask with link in **supporter receipts**.
- Including a soft ask in **new single gift supporter Journeys**.
  - Or add a supporter survey into new single gift onboarding journey that includes a GIW question - if answered yes, trigger an email to link to online Will site
  - Include in an RG cancellation email
- **Add a small banner** on your home page that links to the online Will site.
- **Plan a one off EDM** to existing supporters in key months that showcase the importance of leaving a GIW and link to online Will site.
  - (January/February tends to be a strong time for people looking to complete/update their Wills).
  - Include a Charity week
  - There could also be key days that link to your brand



# GOOGLE PAID ADS



The more exposure to GIW messaging - the more we can move people down the consideration phase to **intention and confirmation**.

## Example Google campaigns you could run for GIW

- **Google Paid SEM ads** - invest media spend to reach higher intent prospects searching for relevant 'bequest' and your charity related keywords
- **Remarketing Display ads** - target people who have gone to your website already with GIW ads to learn more/download GIW guide etc.
- **YouTube ads** - Promote your brand and GIW video content to increase awareness and engagement





**Linked In offers another platform to reach potential GIW prospects and the ability to target people in association with their connection to your cause**

Functionality is sophisticated (similar to Facebook) and you can target ads via interests, work and remarketing.

LinkedIn also can attract potential higher value prospects as we can target by job type, company size, member groups, job title, job seniority, etc.

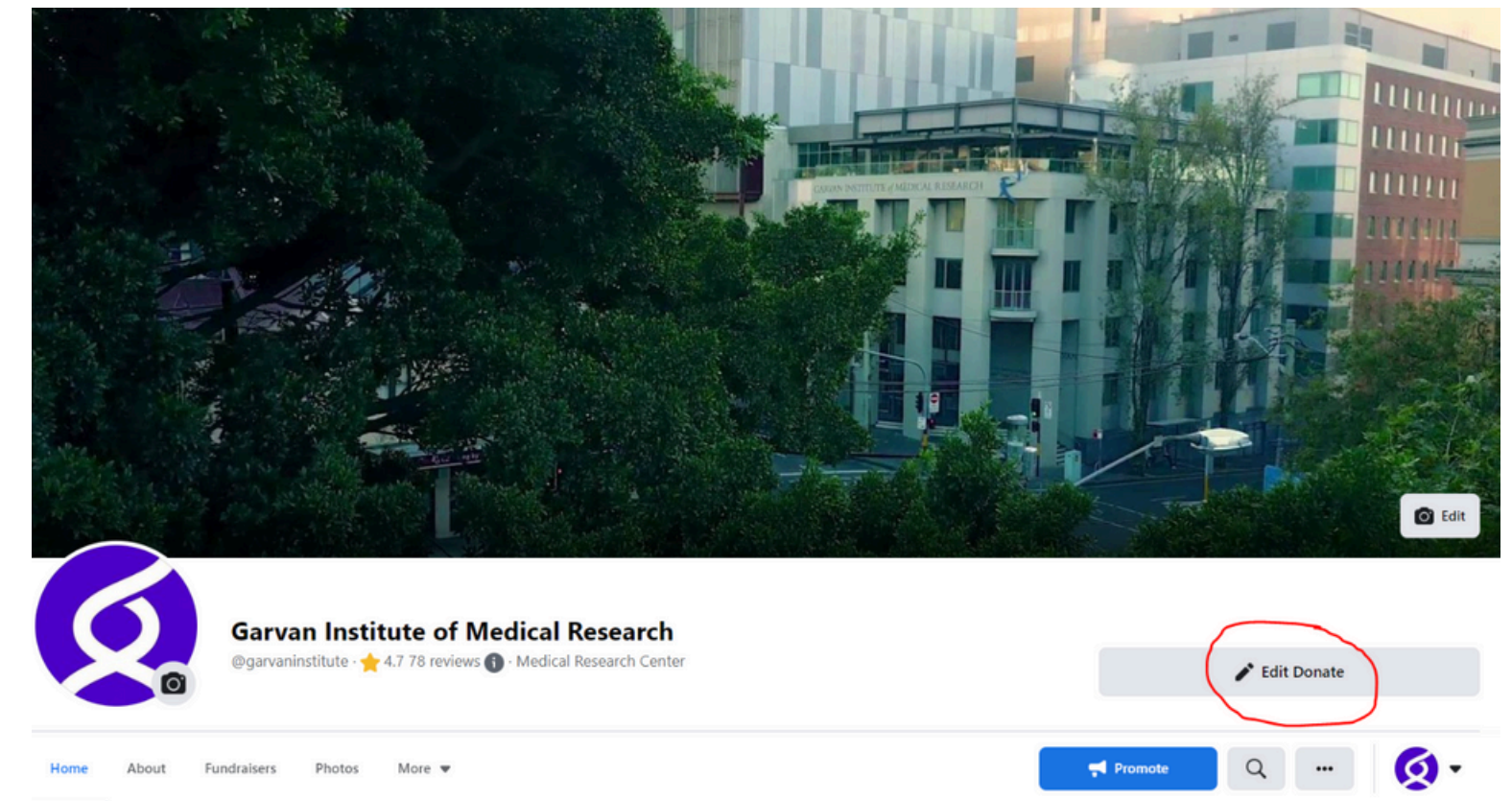


# MAXIMISING YOUR ORGANIC SOCIAL PLATFORMS



Feature the **bequest campaign creative and CTA on home Facebook page**, with a matching CTA Button during peak campaign periods or certain times of the year (ie Include a charity week).

- Update cover picture to Bequest creative
- Update CTA button to drive people to the Bequest page

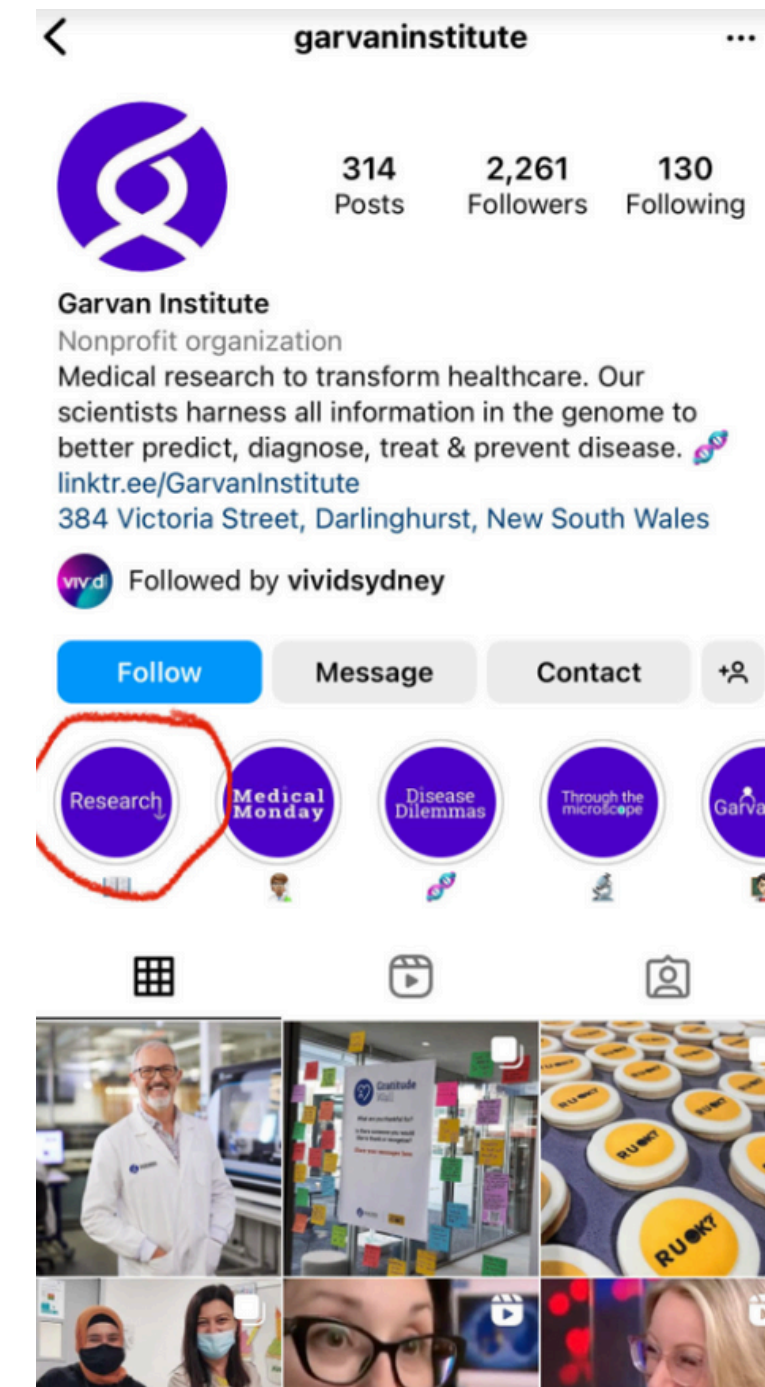




# MAXIMISING YOUR ORGANIC SOCIAL PLATFORMS

Create a **‘Gift in Will’ highlight on your Instagram page** with tiles explaining the process:

- How to leave a Gift in Will
  - Ways you can leave a gift in your will
  - Wording of your Will tips
  - Bequestor stories
- This is a great opportunity to give additional exposure to your GIW content which can be continually updated to maintain its relevance

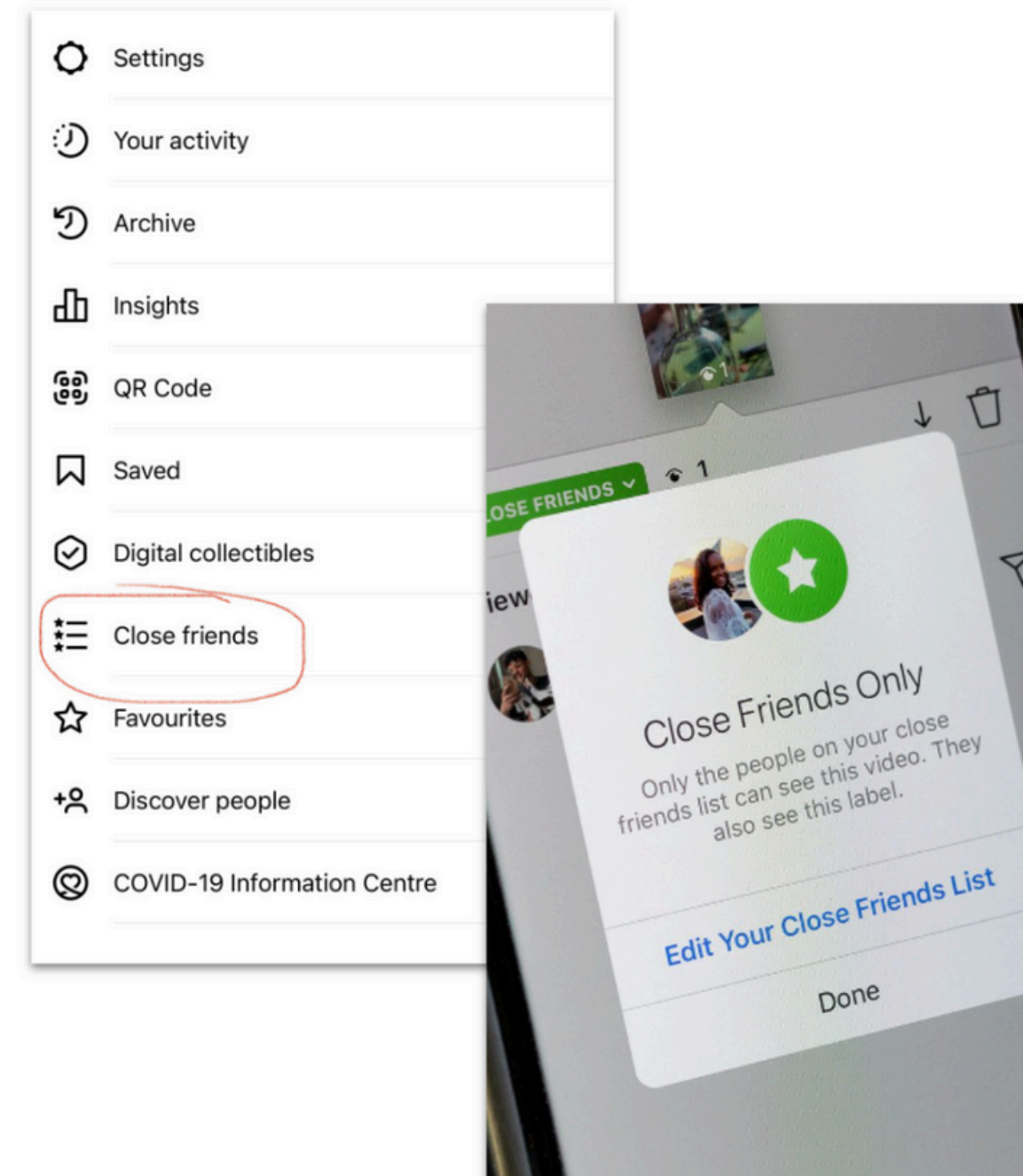


# MAXIMISING YOUR ORGANIC SOCIAL PLATFORMS



Engage with high value donors or high value bequest prospects through **your social channels (Facebook and Instagram)** in a ‘close friends’ capacity.

- Create a special list of ‘close friends’ where you can personalise content to that list only
- Make audience segment feel exclusive and valued
- Tailor content to nurture that specific audience



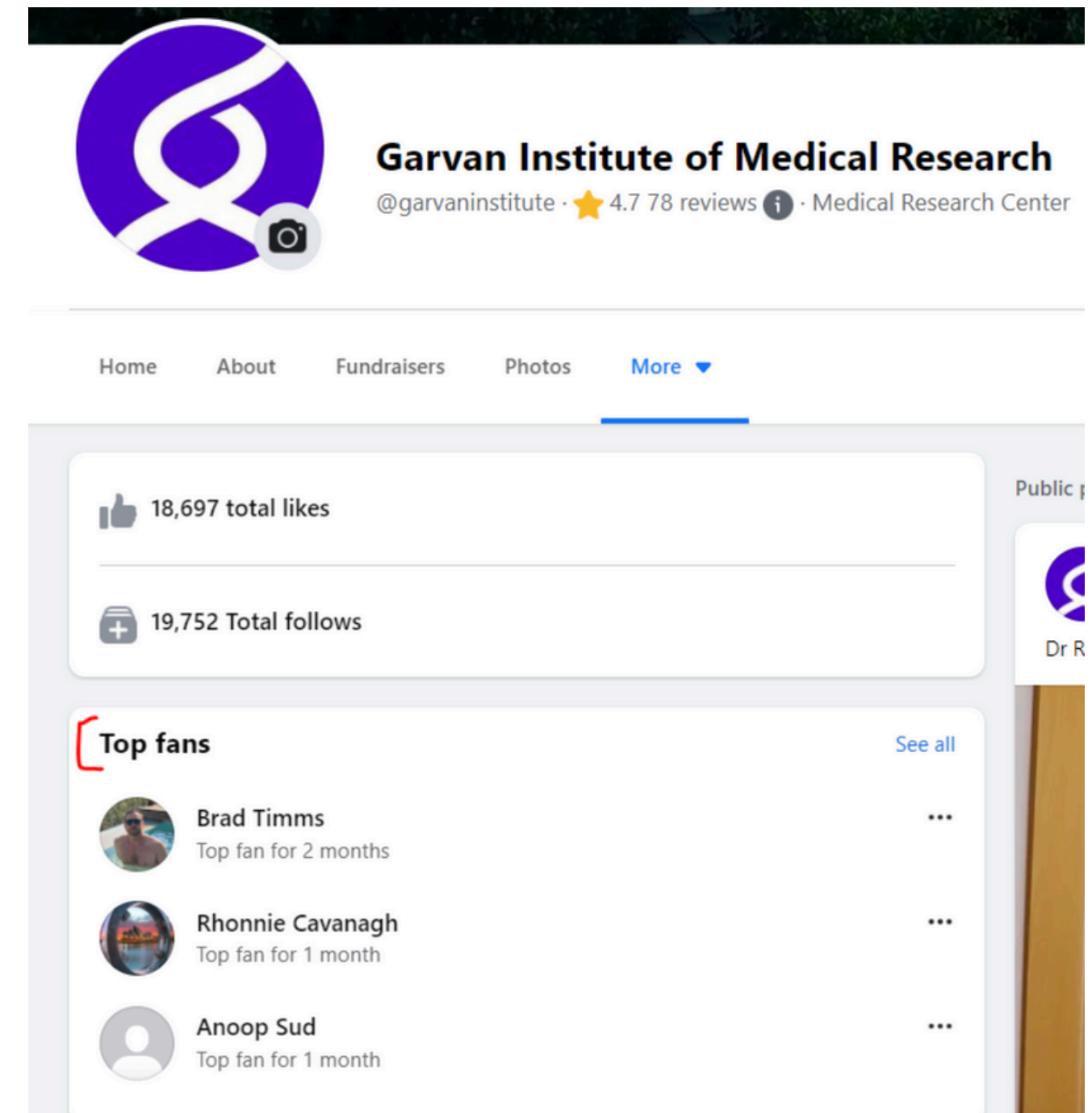


# MAXIMISING YOUR ORGANIC SOCIAL PLATFORMS



Use your **Facebook page's 'community' tab** to **identify your 'top fans'** - ie Fans that engage with your content the most

- Start and create direct lines of contact with these fans to find out their motivations for engaging with your content:
  - Send GIW survey to them directly (capture more data & intent)
  - Send a Direct Message to thank them for their support and ask them if they'd like any specific information about your work.
  - Keep on top of who these fans are and further nurture them



# ONGOING STEWARDSHIP JOURNEY TO NURTURE YOUR GIW PROSPECTS

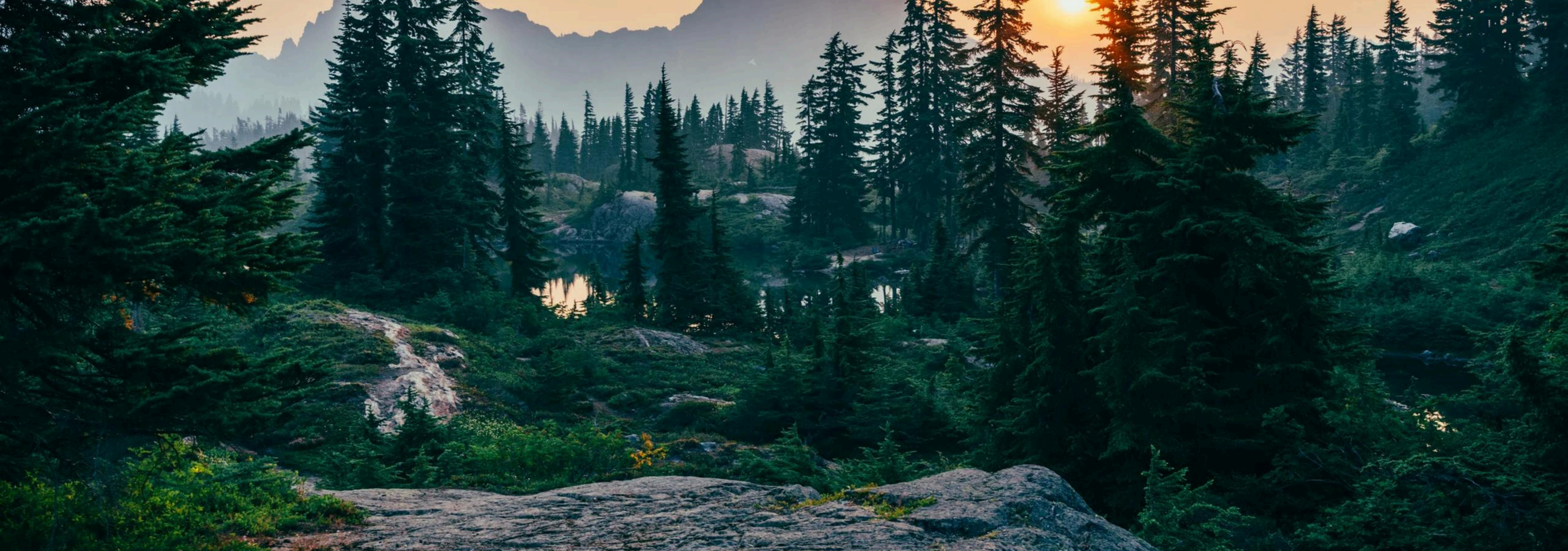


Tailor digital journeys, **integrated with your offline stewardship.**

- Created a **customised and automated supporter journey** for digital bequest leads & prospects
- Continue to **improve the journey comms over time** - automating elements and refining comms that have high engagement
- Look to incorporate **personal offline touchpoints** and call select digital bequest prospects and steward them.







# PILLARS OF DIGITAL SUCCESS





# 4 PILLARS OF DIGITAL SUCCESS



Deeper Engagement & More Donors



Data led



Test and learn approach



Powerful content



Integrated touchpoints



**Digital allows you to be truly data lead and to act fast, targeting the right people, at the right time and effectively apply and utilise learnings**

- **Engage warm audiences** (existing GIW prospects, supporter lists, donors, volunteers etc) along with remarketing
  - Identify those who might be at the stage of starting to think about their Will and leaving a gift.
- Build **lookalike audiences** from your own data lists (ie confirmed bequestors, intenders) and test **relevant interest audiences (eg retirement, cause specific, wealth related)**
- Build **behavioural remarketing audiences** based on people who've shown strong interest but haven't yet converted.
- **Utilise learnings from past work**, surveys, appeal insights, existing personas to develop the campaign approach and creative.

# TEST AND LEARN APPROACH



Digital allows you to effectively test and learn a range of different variants to improve and refine your Gift in Will campaign and messaging over time.

- Can test **a range of areas** fairly quickly:
  - Test audiences
  - Test creative (imagery, videos, copy, headlines etc)
  - Test landing pages
  - Test supporter communications
  - Test different approaches and asks
  - Test higher quality vs higher volume
- Set up **holistic reporting** including 'longtail' tracking of the impact of your GIW prospects





# POWERFUL CONTENT



Digital allows you to deliver more powerful content, such as video and better tell your story and inspire your potential GIW supporters.

- **Understand** what works for your cause
- **Source case studies** and bequest testimonials
- Use **video** - drive engagement and understanding & emotive connection
- Test **different formats** - static ads, carousel, video etc
- Inspire audiences and **evoke emotion** through strong imagery and messaging

# POWERFUL CONTENT



**Mission Australia**  
Sponsored (demo) · 🌐

We wish we didn't have to run this ad.

We wish that every hour, 3,000 Australians weren't forced to seek homeless support services (AIHW 2023).

We wish these things, but the sad reality is that there are thousands of Australians who depend on our support just to get through the night.

A gift in your Will can help reach more vulnerable people now, and long into the future. Once you have looked after your loved ones, secure a legacy of lasting compassion with a gift to Australians in need. ❤️



**Every hour, 3000**  
Australians seek homeless support

FORM ON FACEBOOK  
Leave a gift in your Will to those in need  
We wish we didn't have to run this ad.

Sign up

91 22 comments 17 shares

**Malaghan Institute of Medical Research**  
Sponsored (demo) · 🌐

For over 50 years, the Malaghan Institute has been pursuing the cutting-edge of treatments for some of New Zealand's deadliest diseases. 🧬🔬

We have no plans of slowing down, but medical research takes time, vision, careful planning, and secure funding.

A gift in your will gives us the security to remain on the forefront of life-saving research - turning today's discoveries into tomorrow's cures.

Click to get your free guide on leaving a gift in your will to the Malaghan Institute.



Shape the future of healthcare ...

Join over 50 years of research 🙌  
Form

Download



Download your free gift in will guide

Leave a gift in your will ❤️  
Form

Download

2

**Mission Australia**  
Sponsored (demo) · 🌐

You've probably passed someone like Shane on the street before and wished there was more you could do to help...

In 2018, Shane found himself homeless after losing his job and being unable to pay rent. He had no social supports, no income, no friends, and no family. At his lowest point, Shane wanted it all to end.

Thankfully, our outreach team was there to provide immediate support, and refer Shane to Mission Australia housing and employment services. Shane is now beginning full time employment and moving into affordable accommodation.

This is the kind of life-changing difference you can make with a gift in your Will to Mission Australia. Learn more with our free guide.



**Please don't pass me by.**

A gift in your will could change the life of someone forced into homelessness like Shane\*

**MISSION AUSTRALIA**

\*Name and photo changed to protect identity.

FORM ON FACEBOOK  
Make a lasting impact with a gift in your Will  
Be the difference between homeless and home.

Learn more


166 37 comments 17 shares

**Garvan Institute of Medical Research**  
Sponsored (demo) · 🌐

Garvan Institute, we see a future where we can all enjoy longer, healthier lives.

Research is discovering ways to better predict, diagnose, treat and prevent a range of life-threatening diseases, such as cancer, diabetes, dementia and Parkinson's.

But how leaving a gift in your Will can change the lives of your loved ones and millions of others.



where we can stop disease 🔊

N.ORG.AU

our free Will information guide today  
so we can protect future generations.

Learn more

2 shares



# INTEGRATED TOUCH POINTS



Digital allows you to better integrate your campaign across multiple channels and deliver a seamless experience

- **Optimise your GIW landing page** and existing communications. Map out end to end touchpoints. Look to improve all areas (eg - follow up emails, bequest landing page, bequest booklet, add GIW asks across your site)
- **Cohesiveness** between all touch points - social, EDMs, offline, print, SMS
  - Also feedback insights/results from ads to wider journey



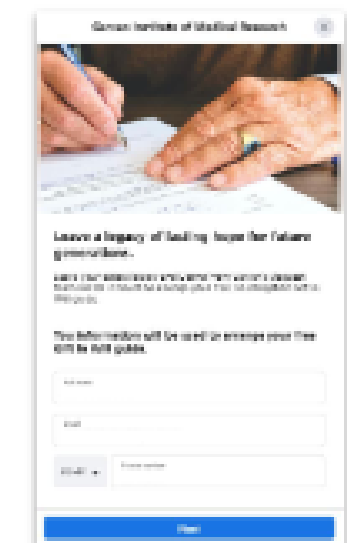
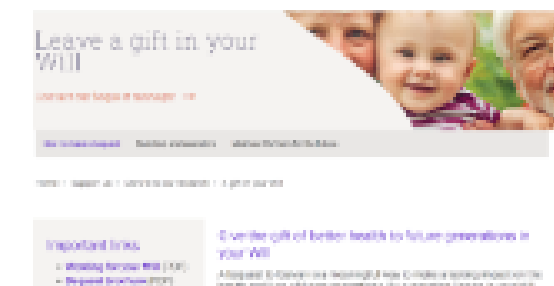
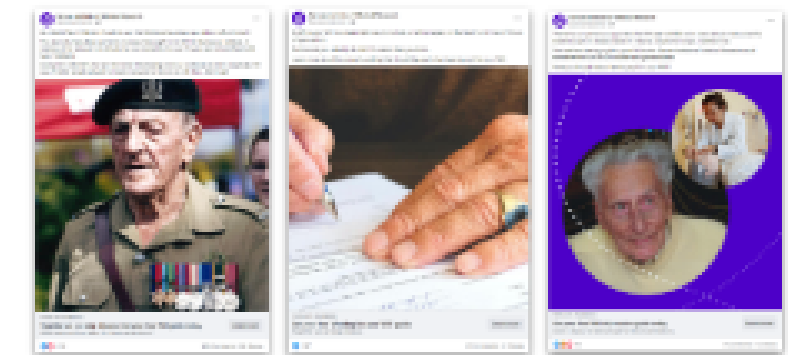


# INTEGRATED TOUCH POINTS

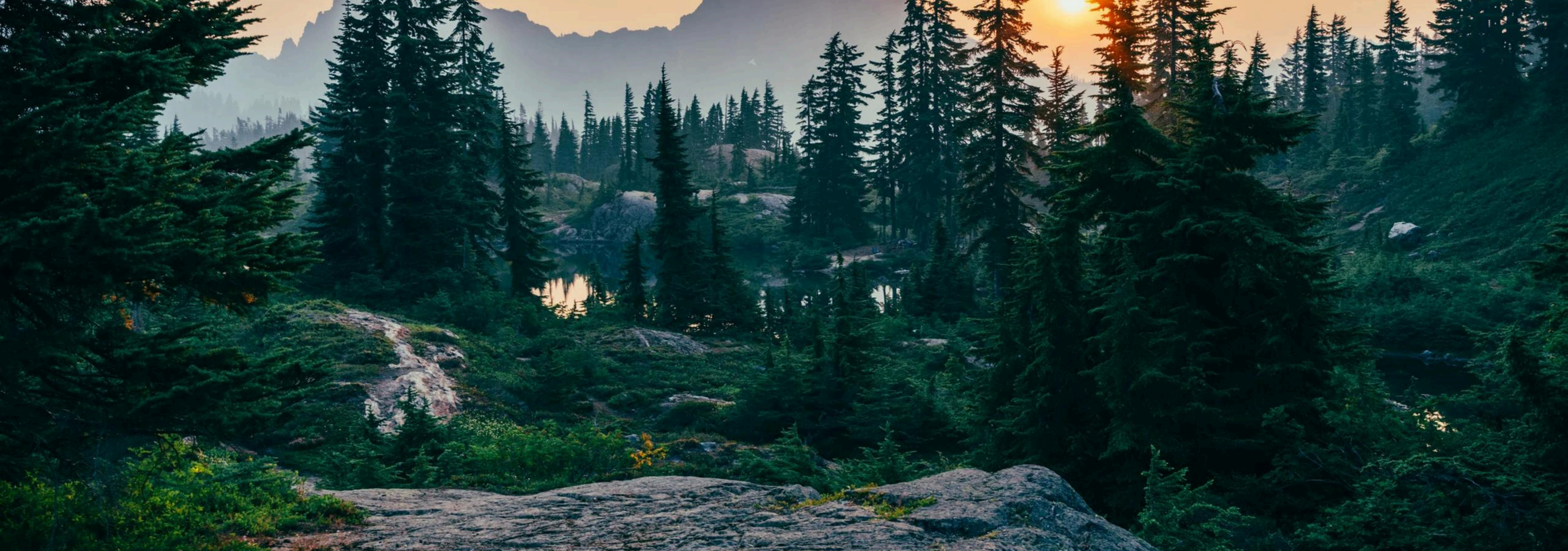


Digital allows you to better integrate your campaign across multiple channels and deliver a seamless experience

- **Develop a ‘welcome journey’** for the new GIW leads and **automate** as much as possible - ensuring emails/SMS are sent quickly without manual delay







# **DIGITAL GIW LAUNCH CHECKLIST**





# PROCESS





## **Start with a deep-dive of your current bequest program - including your digital set up**

- Meta Ads manager set up properly - tracking is essential!
- Involve key areas of organisation - Brand, Individual Giving, Comms, Data Team
- Review bequest content, past campaigns and fundraising messaging
- Review any supporter data, surveys, research, Facebook appeals, Google Analytics

# STRATEGISE

## Develop a digital launch plan then refine over time

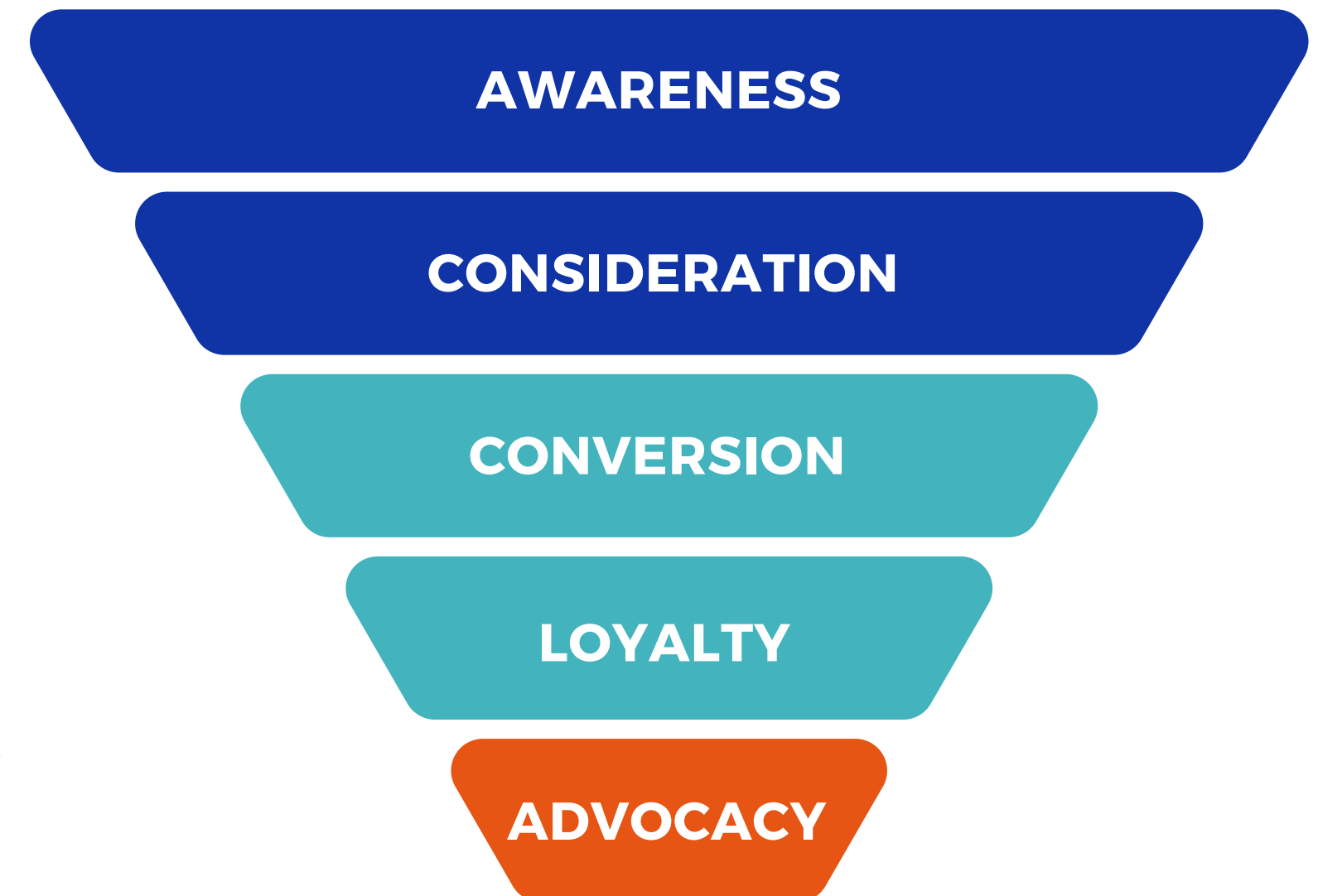
- Develop audiences personas
- Workshop and develop creative approach
- Develop and get Plans approved -
  - Channel approach
  - Targeting and KPI's
  - Adequate budget signed off for the year and organisational buy in (including necessary resource)
  - Journey plans and relevant tech/infrastructure set up



# CREATE



- Repurpose existing content where possible & create custom content for the campaign
  - Video is essential along with beneficiary case studies, GIW testimonials, showing impact etc
- Create and set up the journey comms and test before launch
- Develop 'always on' digital program by creating a suite of content for both 'top of funnel' and 'conversion' campaigns to deeply engage the various key audiences (from less engaged to more engaged)

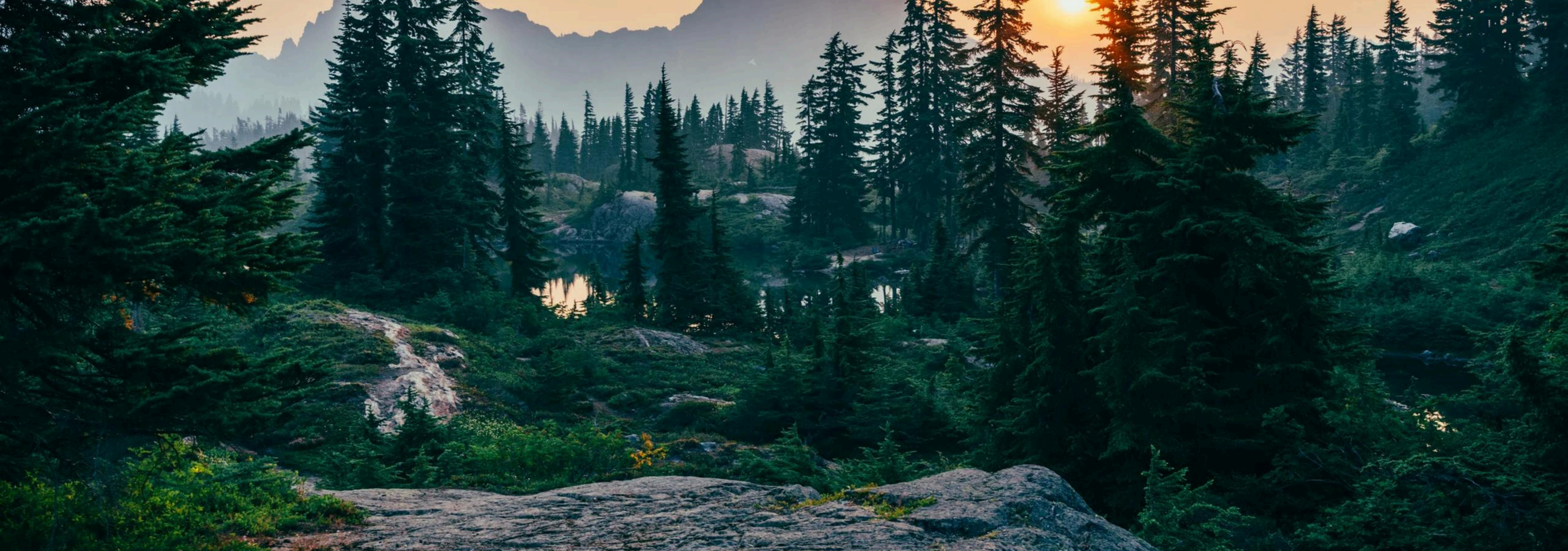




## Action the agreed plans with a test and learn approach - agility is key

- Structure Facebook ad campaigns (or other channels identified) by the different objectives and audiences
  - Start small then scale up
- Ensure tracking and reporting is in place - including 'longtail' results
- Utilise organic channels and owned assets as much as possible
- Regularly check in and identify opportunities to optimise





# SUCCESS STORIES





# PAST SUCCESS

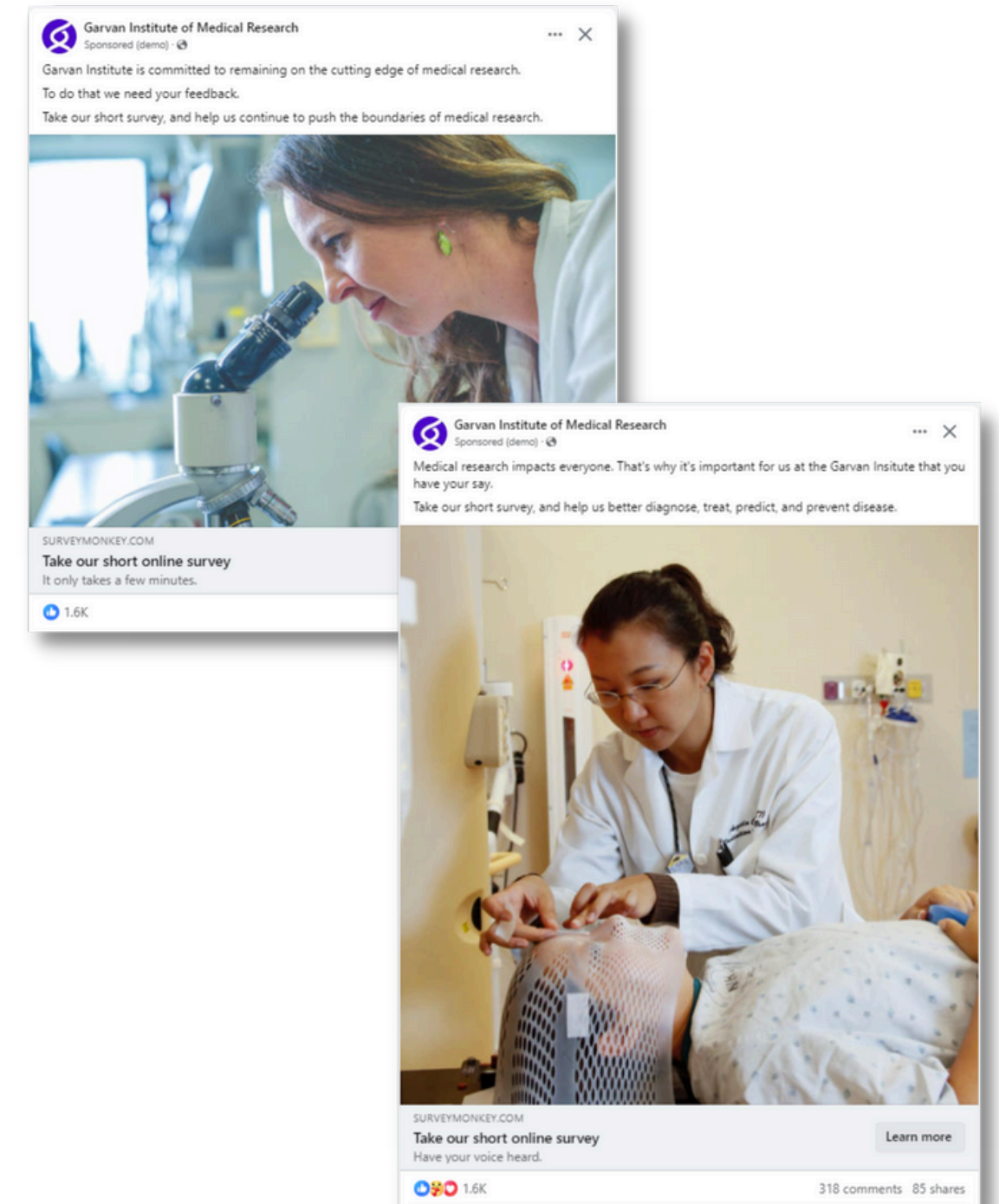


## Garvan Institute

We have generated for the **Garvan Institute of Medical Research's** Gift in Will program over 3 years from 2020 - 2023:

- 1,776 Meta Gift in Will leads - qualified through Facebook Lead Forms
- 4,215 GIW Survey completes
- Over 1,000 Bequest brochures downloaded from Garvan's website

In total, this has led to **\$28 million + in estimated future income** for the the Garvan Institute of Medical Research at an amazing **ROI of 132!** (including agency and media costs)



# PAST SUCCESS

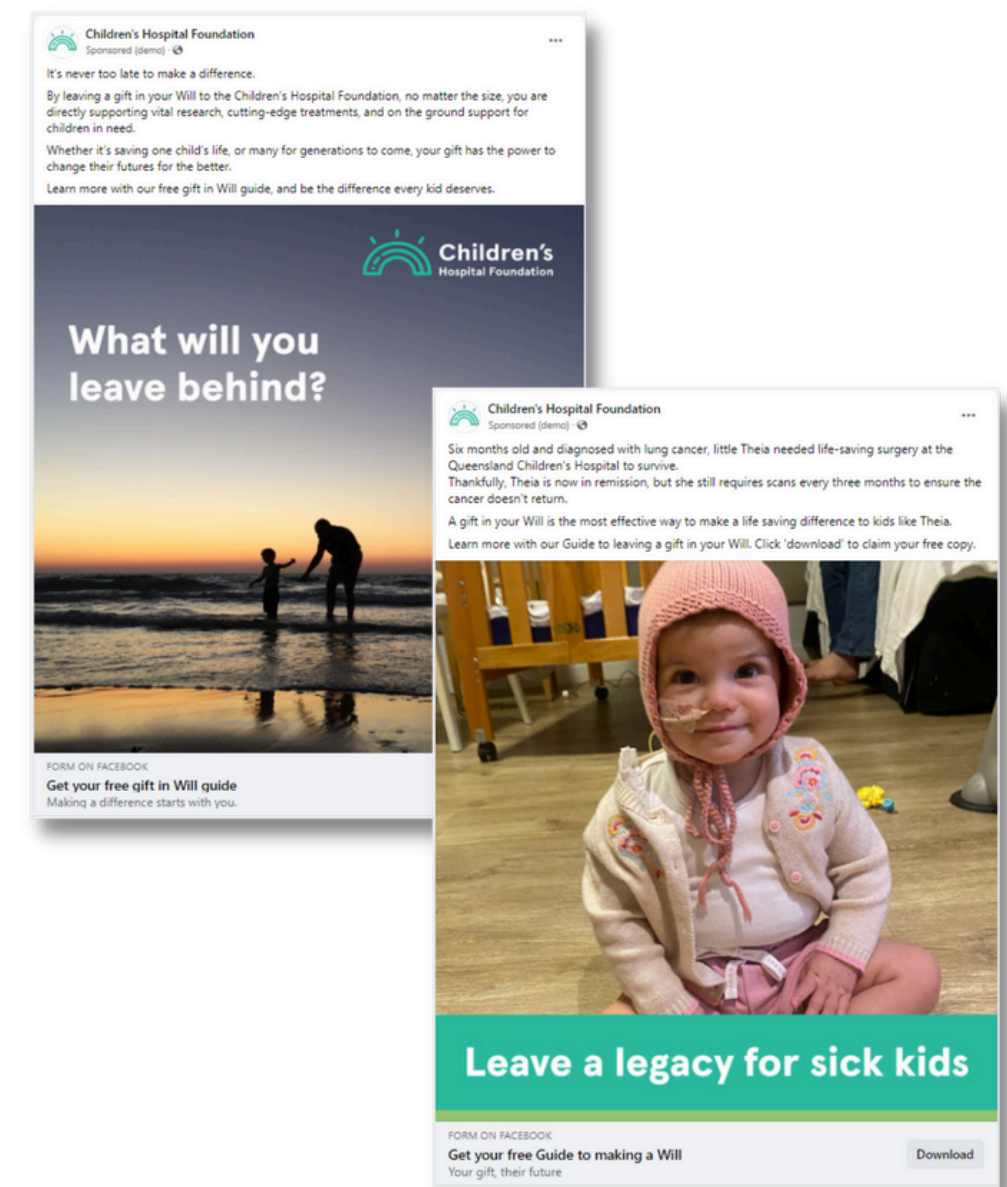


## Children's Hospital Foundation

Between 2021 and 2023 we developed the **Children's Hospital Foundation** Gift in Will Program - generating:

- 468 Meta Gift in Will leads - qualified through Facebook Lead Forms
- 1,191 GIW Survey completes - through a customised Survey Monkey CHF page
- 282 Bequest brochures downloaded from CHF's website

In total, this has led to **\$8.6 million + in estimated future income** for the the Children's Hospital Foundation from these leads - at a **39 ROI!** (including agency and media costs).





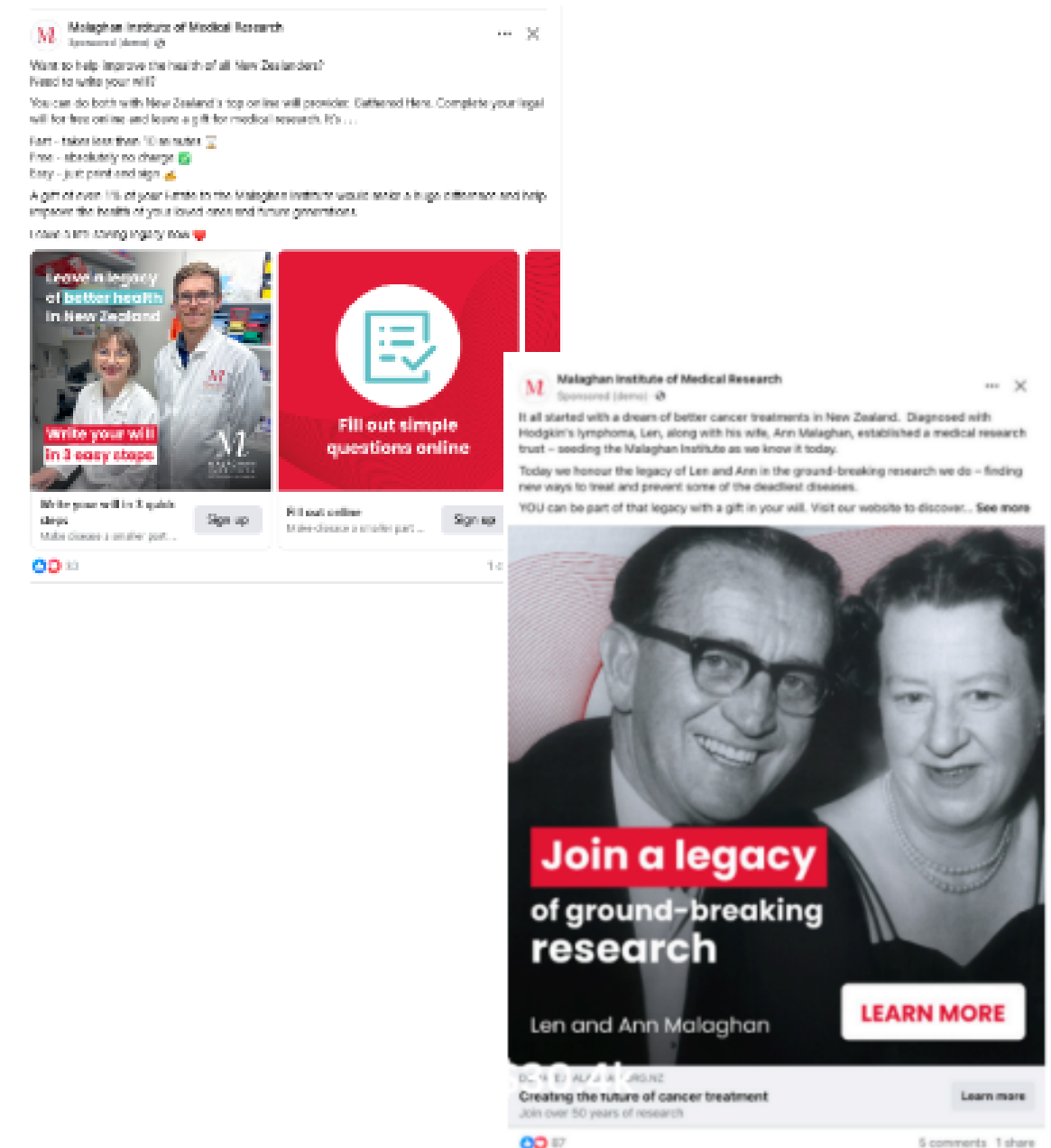
# CURRENT SUCCESS



## Malaghan Institute of Medical Research

Launched in September 2024. As of the 5th November, 2024;

- 46 Meta Gift in Will leads - qualified through Facebook Lead Forms
- 2 confirmed GIW's via online will platform (from cold acquisition social ads) potential revenue of over \$300K
- 1.4k landing page views to Gifts in Will page from social ads
- 4,585 link clicks from Gathered Here social campaign



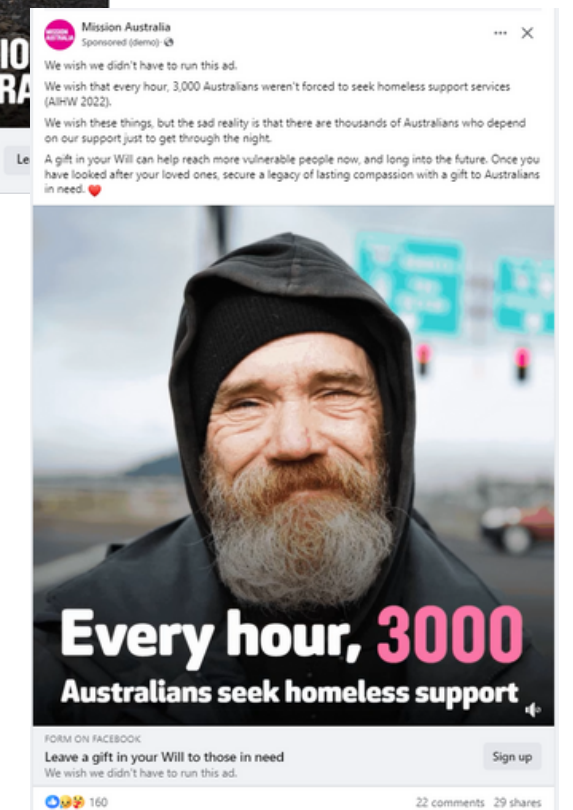
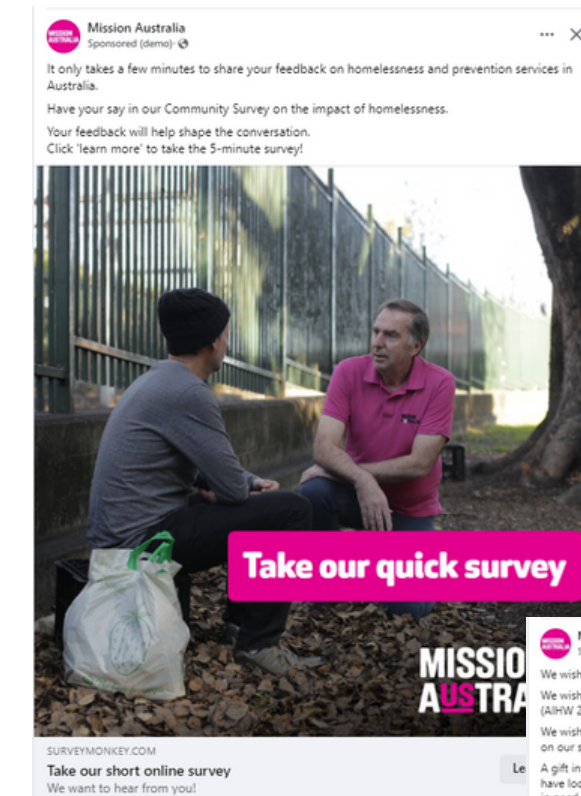
# CURRENT SUCCESS



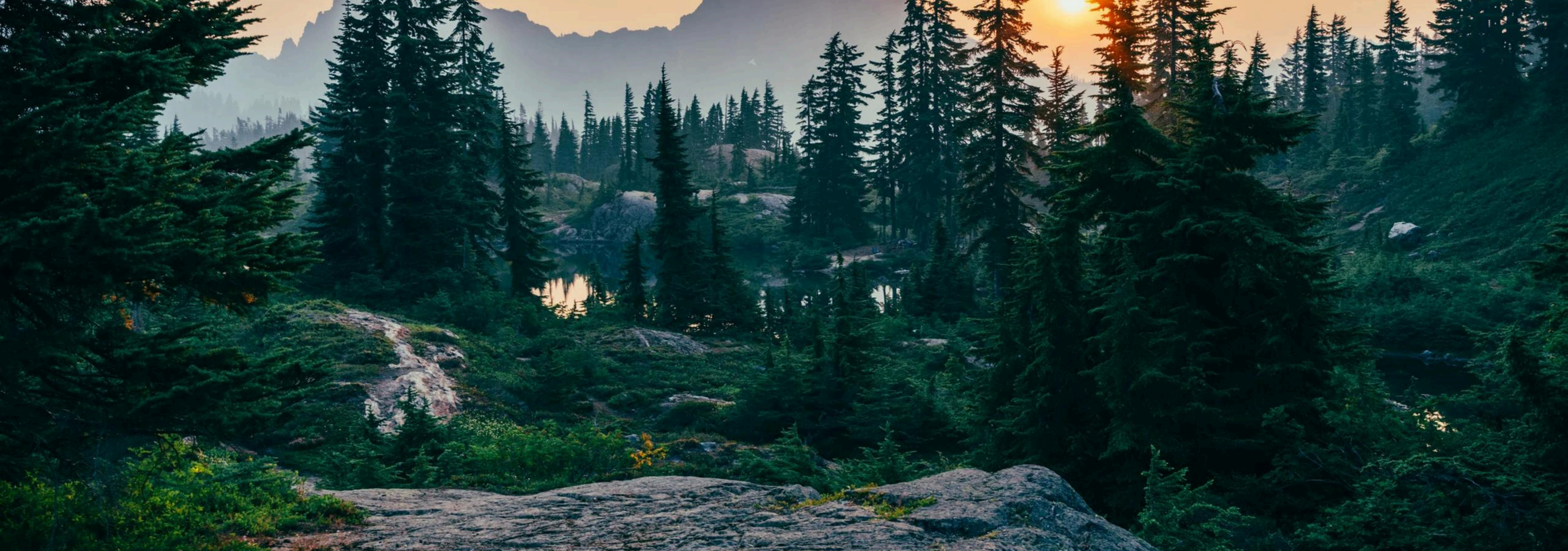
## Mission Australia

Launched in September 2023. As of 19th of November 2024;

- **600+ Meta Gift in Will leads** - qualified through Facebook Lead Forms
- **900+ GIW Survey completes**
- In FY25 we have tracked so far:
  - **36 considerers**
  - **15 intenders**
  - **2 Confirms**







# KEY TAKEAWAYS





# KEY TAKEAWAYS

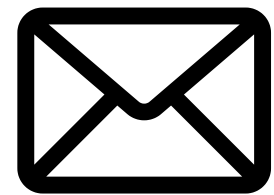


- Ensure appropriate resource, budget and buy in
- Integrate with other areas - offline/online
- Develop plans and ensure integrated journeys are set up
- Develop strong creative, stories, videos and assets
- Test and learn (and iterate)
- Can't be turn on, switch off - think long term/ 'always on' approach
- Develop robust tracking

And if you need support..talk to us! :)



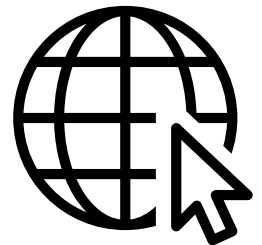
# QUESTIONS?



jeremy@bigfootfundraising.com.au



0410 371 321



[www.bigfootfundraising.com.au](http://www.bigfootfundraising.com.au)







**THANK YOU!**

**BIGFOOT  
FUNDRAISING**

