

The Miracle Marketing Plan

It takes all the running you can do to keep in the same place. If you want to get somewhere else, you must run at least twice as fast as that!

-Said the Queen in *Alice in Wonderland*

By Lewis Carroll

What is “marketing”? While plenty of people use the word, few actually use the concept. In the fundraising business, people sometimes tend to think of marketing in terms of websites, mailings, brochures, seminars, social media and other forms of outreach. These are vehicles of communication, not marketing. Marketing is something wholly different—studying, analyzing, assessing your markets. Segmenting your market and developing “products” for your “ideal customer avatar”. Creating your USP, developing response mechanism, split-testing, launching marketing campaigns, matching your responders with your ideal customer avatar’s traits, likes, needs, wants. There is so much more to it.

New, fresh thinking must occur in the field of planned giving. Breakthroughs, such as spending at least as much of your budget for marketing consultants or staff members as for lawyers or technically-oriented planned giving staff, would be a large step in the right direction.

Many practitioners in the field focus on gift vehicles and taxes because tax technicalities may cause them fears and insecurities. They often turn away opportunities to learn marketing and management principles as they relate to planned giving and opt, instead, for courses in gift design, bequest mailings, or software-generated taxes/deduction calculations. However, to use the technical information learned in those courses **you must have a prospect to talk to**. Finding those prospects and then getting them to meet with you one-on-one is your ultimate goal. Without effective marketing you may as well “talk financial and taxes” to the closest wall. You will waste time, knowledge and money without learning how to acquire fruitful markets that you can address with your message.

Peter Drucker said “Marketing should make selling superfluous.” In planned giving, marketing should make a hard ask or a “sale” superfluous. Marketing for planned giving should create the demand that makes the undertaking of transfer into a gift vehicle a logical thing to do. You simply solve a problem for the donor or family.

Let us break this down into a simple definition. Planned giving marketing is the process of identifying target markets, assessing and identifying the wants and needs of

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those markets, creating perceptions of meeting those wants and needs with planned gift vehicles, effectively communicating that perception to the prospects and effectively implementing the gift transaction.



Type 1 is the closed marketing system – organizations serving a particular group that also rely on that same group for some degree or most of its funding. Type 1 organizations do not need to educate their prospects about the organization to the same degree the other models do because their constituency is their market. Their constituency is already familiar with, and invested in, their services, which means they can move more quickly toward the benefits to the donor of planned giving vehicles. These types of organizations include churches, schools and hospitals.

Type 2 organizations are in an open marketing system, where they serve one group of the population as their constituency, but look to others for financial

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investment and support. Social service agencies and true charities fall under this type. These organizations need to serve up plenty of education and selling of the “intangible product” they provide before prospects might consider planned gifts. They need support from people other than those they serve, in general. The organization must communicate who it is, what need it serves, why that need is important, why this organization does it better than others delivering the same or similar service, how much it costs to provide the services, and why someone should fund it. Once that uphill battle is done, the financial benefits of planned giving vehicles can come into play with the prospect. However, if the initial step is missed, it is not likely that a gift will be made.

Type 3 organizations are a bit of a hybrid, in that the program’s product or service is an intangible benefit that people enjoy or experience, but it does not directly touch them in the same way a religious or educational affiliation does. For example, an environmental organization generally improves the quality of life around a person and the person appreciates and understands that benefit. But the intangible benefit deriving from the program’s existence must be communicated in order to tighten up the linkage between the intangible service provided and the benefit to the donor prospect. Consider also civic or community organizations that better the quality of life, such as a symphony, or a museum. The prospect didn’t go to school there, and doesn’t go to church there, but the organization does positively affect the quality of life in that community. Thus, the organization has to do some education as to how the prospect’s life is bettered by the organization’s existence, which then leads to its ability to communicate why a planned gift to support it makes sense. It’s not as easy to do planned giving fundraising as it is with a church or school, but it is easier than a Type 2 organization.

The depth and the level of marketing activity will greatly differ among these three types of organizations. In fact, the choice of communication methods – such as mailings of brochures and newsletters, presentation of seminars, content for a website, and personal contact – will be affected by the type of organization. For example, a Type 2 organization will need to have a more savvy, professionally-designed marketing content that catches the eye in order to inform in the quickest way possible. Those who give need to know why they like the service offered to the other group of people (the constituents served) and why they would support it with long-term gift vehicles.

Developing a Marketing Plan

In launching or revitalizing a planned giving program, it is essential to develop a marketing plan. Again, we recall the wisdom of Yogi Berra, “If you don’t know where you’re going, it may be difficult to get there.” There are six basic steps to follow:

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Step One: Find out who is your largest, but yet realistic market.

Step Two: Segment the market into target markets based on certain factors, such as types of people, assets the own, where they live, their ages, etc.

Step Three: Design “products” in advance to meet needs discovered in each segment, or target market based on their wants, needs, problems, issues, etc.

Step Four: Research the competition and find your “unique selling proposition” or USP. What makes your organization stand out?

Step Five: Create channels of communication to reach each market segment uncovered in the first four steps. This outreach is often where planned giving offices start, without understanding who the market really is. Many just put content on their website or send out brochures about gift vehicles. You need more targeted, researched outreach, with a mechanism for response.

Step Six: Once a person responds, then package the vehicle for the individual prospect, tailoring it to their specific situation.

Sometime soon, I will finish my book/video course, “Miracle Marketing Method for Planned Giving” taken fin part from Blueprint for Planned Giving Success” Book Two--Plan. Book One is “Think”, Book Two is “Plan”, Book Three is “Act” and Book Four is “Manage.”

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