



# Neurogiving: The Neuroscience of Gift Planning (and What to Do About It)

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Kindsight





Chris Theis  
National Champion  
2008  
& 2009  
(only two peat in  
history)

I taught people to win arguments  
for a living.

Then my strongest  
fundraising arguments started  
losing to my *weakest* ones.

WHAT MOST OF US WERE TRAINED TO BELIEVE

People hear the case, weigh the evidence, and decide.

Hea  
r

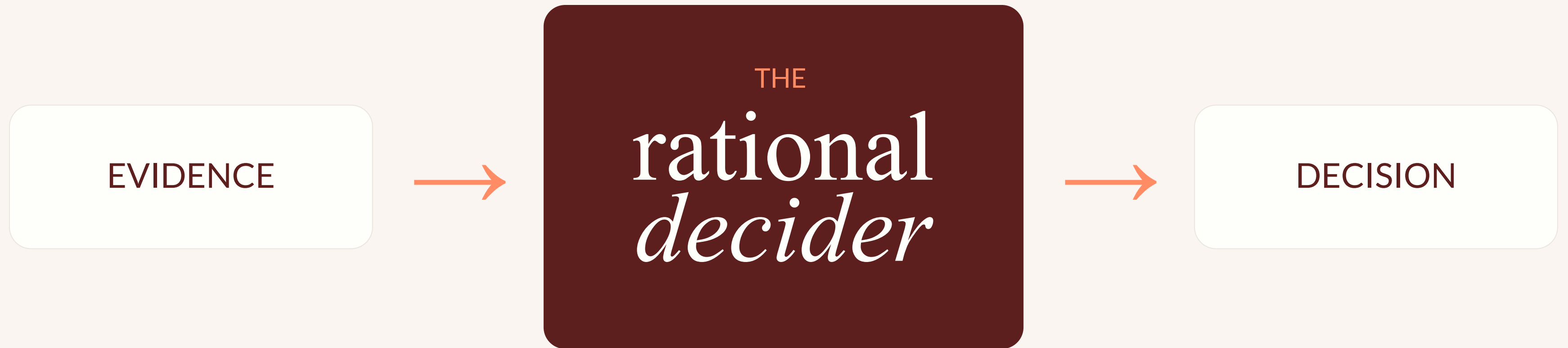


Weig  
h



Decid  
e

# Rational inputs. Rational outputs.



~~The rational decider~~

That person does not  
exist.

Not in this room. Not  
*anywhere.*

THE PREMISE

The verdict was in before I  
finished the argument.

Let's get those neurons firing.

HERE ARE THE RULES

Remember as many words as you  
can.

Most right answers *wins*.

TEN SECONDS

10



Bed

Catnap

Doze

Rest

Nod off

Slumber

Awake

Shut eye

Snore

Tired

Sedate

Nap

Draem

Hit the sack

Siesta

Wake

Corn Dog

Yawn

Snooze

Conk Out

Drowsy

Blanket

Lie Down

Peace

Try to remember as many words  
as you can

## CHECK YOUR LIST

Is *bed* on your list?

Is *dream* on your list?

Is *corn dog* on your list?

Is *sleep* on your list?

Is *snore* on your list?



CHECK YOUR LIST

# Is *bed* on your list?

→ **Primacy effect**

Bed

Dream

Corn dog

Sleep

Snore

CHECK YOUR LIST

# Is *dream* on your list?

→ Zeigarnik effect

Bed

Dream

Corn dog

Snore

Sleep

CHECK YOUR LIST

# Is *corn dog* on your list?

→ Contrast effect

Bed

Dream

Corn dog

Snore

Sleep

CHECK YOUR LIST

# Is *snore* on your list?

→ Recency & spacing

Bed

Dream

Corn dog

Snore

Sleep

CHECK YOUR LIST

Is *sleep* on your list?

Bed

Dream

Corn dog

Snore

Sleep



# Sleep was *never* on the list.

|          |        |        |          |         |              |          |          |
|----------|--------|--------|----------|---------|--------------|----------|----------|
| Bed      | Catnap | Doze   | Rest     | Nod off | Slumber      | Awake    | Shut eye |
| Snore    | Tired  | Sedate | Nap      | Draem   | Hit the sack | Siesta   | Wake     |
| Corn Dog | Yawn   | Snooze | Conk Out | Drowsy  | Blanket      | Lie Down | Peace    |

SLEEP

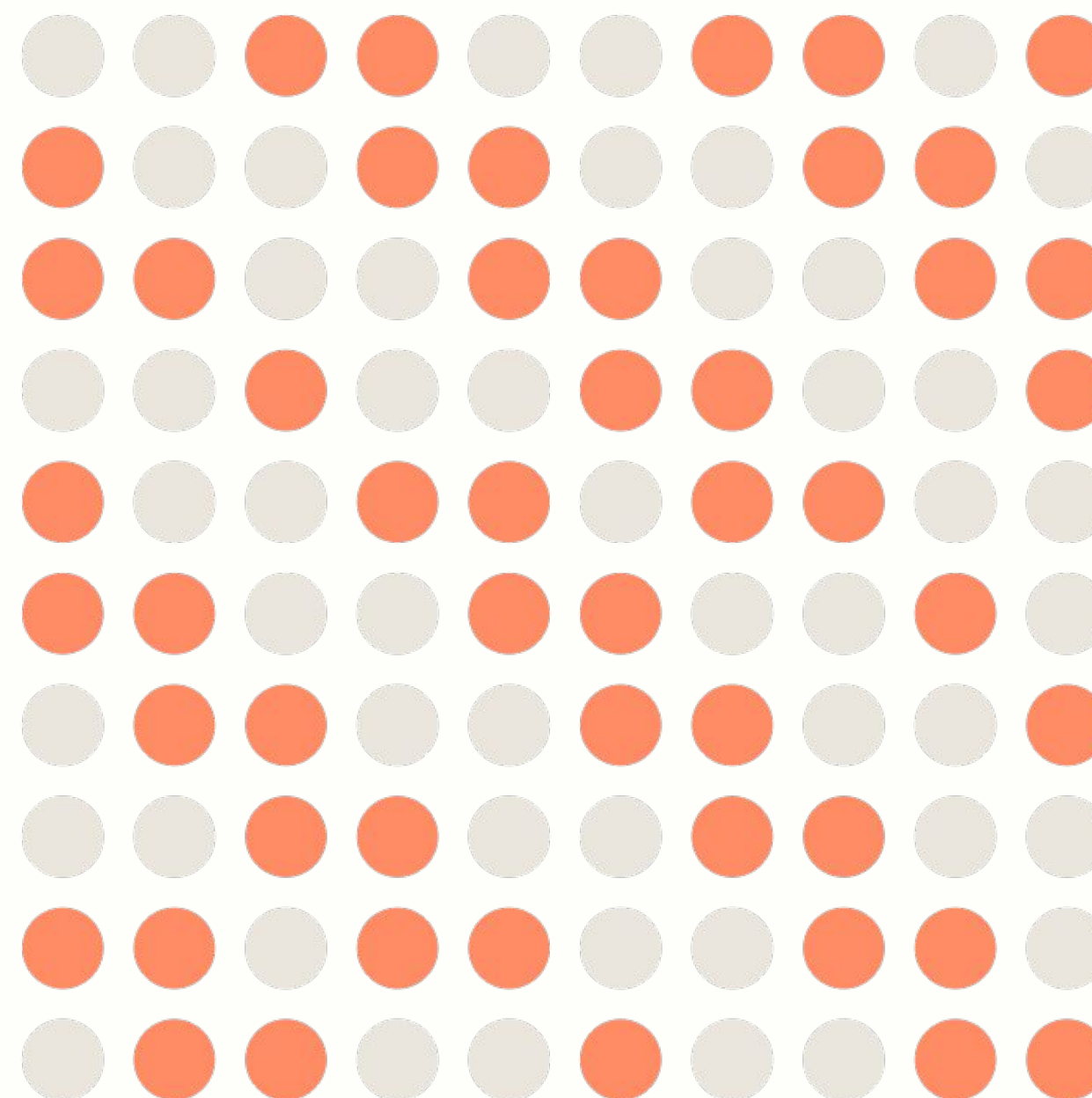
NOT ON THE LIST

AND IT IS NOT JUST YOU

About half of any room  
remembers a word that was  
never there.

> 50%

of a typical room recalls “sleep”



You didn't misremember a word.

You reconstructed a *meaning*.



THE ONLY MOVE YOU HAVE

You never said the  
word. *They* said it for  
you.

℔



We ask people to  
imagine being ~~dead~~.

“

Let me think about it.

— EVERY DONOR WHO NEVER CALLED BACK

K

WHAT I GOT WRONG

I was right  
~~about~~ everything.

g  
*It did not matter.*

K

# 85%

say nonprofit performance matters in their giving decision.

3%

actually use performance data when they choose.

THE SAY-DO GAP

# What donors say they use, and what they use.

Say performance data matters



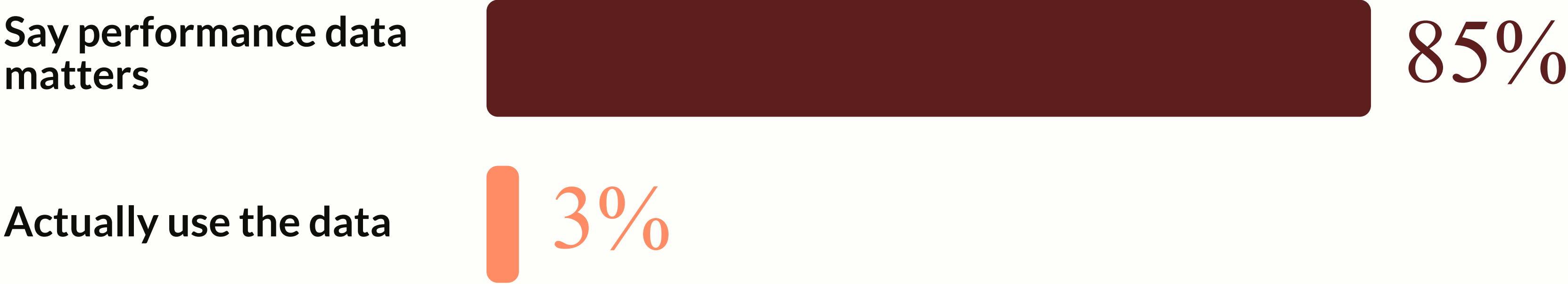
85%

Actually use the data



THE SAY-DO GAP

# What donors say they use, and what they use.



THE REFRAME

That is not a knowledge  
problem.

It is a *language* problem.



THE TURN

You do this to donors.

The only question is *which word*  
you used.



ACT ONE

# Why they don't *hear* *you* .

Four forces close a legacy conversation before you ever say the word “will” — and the language that neutralizes each.



THINGS WE SAY INSTEAD

# Forty ways to not say it.

Final wishes · When the time comes · After you're no longer with us · The ultimate gift · Sunset years · Should something happen · Upon your passing · Your final chapter · In the event of · The inevitable · **Live on forever · Your name endures · A lasting legacy**

THE LAST THREE TESTED AT ZERO EFFECT · JAMES, 2016





FORCE 01 OF 04 • MORTALITY SALIENCE

# Reminders of death trigger avoidance.

Threat-coded phrasing **narrows attention** and raises defense. The donor is still nodding. They are not still there.

GREENBERG ET AL., 1986 • TERROR MANAGEMENT THEORY



WATCH FOR

# The four phrases that close the room.

“estate plan”

“after you’re gone”

“end of life”

“final wishes”

NEUTRALIZE WITH CONTINUITY, AGENCY, IDENTITY

Frame the gift as *continuation* — not closing.

*“The part of your work you’d want to keep going...”*

*“What you’ve built so far, made permanent...”*

*“What would you want your name still doing in twenty years?”*



JONAS ET AL., 2002 • THE SCROOGE EFFECT

Death reminders did not  
shut people down.

They opened <sup>u</sup><sub>p</sub>  
them .

THE ONLY VARIABLE WAS WHERE THEY STOOD JONAS ET.AL 2002

# Two sidewalks. Same questions.

THREE BLOCKS AWAY

Baseline warmth  
toward the causes they  
care about.

IN FRONT OF A FUNERAL HOME

Measurably *warmer* .  
And they gave more.

But only to causes already part of who they were. Foreign causes got nothing extra.

Death is not the problem.  
Death without identity is.

You are not asking people to think about dying. You are asking them what they want to keep.



FORCES 02 + 03 OF 04 • NORMS & ARCHITECTURE

# Donors look sideways before they decide.

*“Most of our donors at your stage...”* is doing norm work — and the order you introduce choices in is conversation design.

FREY & MEIER, 2004 • BICCHIERI, 2006 • JOHNSON & GOLDSTEIN, 2003



First the *identity* commitment. Structure comes later.

“A gift in the will.”



Vehicle, structure,  
percentages.

*“Most donors with your length of involvement start by adding the org to the will, then we work out the structure.”*

FORCE 04 OF 04 • COGNITIVE LOAD

When working memory is full,  
donors don't decline. They  
*postpone.*

Then they don't come back.

SWELLER, 1988 • KAHNEMAN, 2011



## THE BRAIN'S WORKSPACE

Working memory holds about three things.

1

2

3



count

A TYPICAL CONVERSATION ABOUT A PLANNED GIFT

# Your planned giving conversation has twelve.

Three slots. Nine on the floor.

The vehicle

The need

The amount

Impact story

Recognition

Tax benefit

Timeline

Naming

Endowment

Annual fund

The board

The fund



## LOAD SOURCES

# Bandwidth, not vehicles, is the constraint.

Too many options

Technical jargon

Rapid pacing

No silence

0.9 sec

is the pause we leave before we start talking again.

ROWE, 1986



## WAIT TIME VS. ANSWER LENGTH

Wait three seconds. Get up to *seven times* more.

1×



0.9-second pause

7×



3-second pause

Same teachers, same students, same questions. The only change was the silence.

THE MOVE

The most persuasive  
thing you will do is  
*nothing.*



ACT TWO

What is actually  
happening *in there*.

The words you choose physically change how donors process  
the opportunity.



# Four findings.

01

Reward and  
memory fire  
together.

SPRENG, 2009

02

Talking about  
yourself is a  
reward.

TAMIR & MITCHELL,  
2012

03

Story moves  
behavior.  
Facts do not.

MAR, 2011

04

Bequest  
decisions run  
on  
autobiography.

JAMES & O'BOYLE, 2014

THE IMPLICATION

Donors are not evaluating  
your *proposal*.

They are imagining themselves  
in the

y

K

THE MODEL

Identity × Trust × Habit.

Three interacting subsystems govern whether a legacy commitment forms — and which language activates each.



THREE SYSTEMS. ONE COMMITMENT.

# No single system carries a legacy gift on its own.



Language that activates one without the others produces compliance, not commitment.



# Public statements create *behavioral inertia* .

Identity, once stated aloud, drags behavior toward congruence. Build the list — and let the donor say it.

*“Most people who have given for ten years end up thinking about how the work continues without them. Has that crossed your mind?”*

# Vulnerability beats *polish*.

Not confession — an exchange rate. Trade one real piece of information about your situation for one of theirs.

*“I don’t know what’s right for your family. I do know what’s worked for donors in similar situations — can I share two, and you tell me what fits?”*

# Life-stage cues are *triggers*.

Retirement. Estate planning. The first grandchild. Listen for the transition before you introduce the vehicle.

*“You mentioned your daughter just had her first baby. A lot of donors revisit their estate plan in that first year — has that been on your mind?”*

## THE INTEGRATION

# Identity, trust, habit. That is the list.

Identity without trust → *compliance*

Trust without habit → *a single conversation*

Habit without identity → *automatic giving*

All three, sequenced → *a legacy commitment*

ACT THREE

When they say *no*.

Every objection is a surface read of an underlying bias. Different bias, different words.



“I need to take care of my family first.”

UNDERLYING BIAS      **Loss aversion**

Reframe as protection, not subtraction.

*“What if there were a way to take care of family and keep this going  
— with no compromise to either?”*

“This seems really complicated.”

UNDERLYING BIAS

## Choice overload

Reduce the choice set to one.

*“The simplest version is one sentence in the will. Everything else is optional and later.”*

“I want to make sure it’s used the right way.”

UNDERLYING BIAS

Ambiguity aversion

Resolve the unknown — not the dollar amount.

*“Let’s talk about what ‘used the right way’ looks like to you, then we’ll build the language together.”*

THE PRINCIPLE

Respond at the *bias*  
level.

Same surface objection. Three different responses.



THE TOOLKIT

# Magic words & language *patterns*.

Not scripts. Patterns with documented mechanisms — the kind  
you can teach.



## THE DEFINITION

They create *openness*, not resistance.

Simple.

Powerful.

Repeatable.

All four are about **removing** something — not adding pressure.

“I’m not sure if it’s for you,  
but...”

Removes pressure.

Preserves autonomy.

Defenses drop because there is nothing to defend against. Use it to open the subject at all.

PATTERN 02 • MECHANISM: RETRIEVAL + SELF-DISCLOSURE REWARD

# “What do you know about...”

Activates retrieval.

Makes the donor the expert.

You learn their real starting position instead of guessing at it.



“How open-minded would you be to...”

“Open-minded” becomes the frame.

The donor wants to confirm the identity.

Invites discussion of an option without commitment pressure.

“Most people in your situation...”

Sets a norm with someone they recognize as themselves.

Triggers conditional cooperation.

The James finding, in the form of a sentence you can say on Thursday.

“

It's not about *word*  
you use. It's about how they  
make people

1

— THE GOVERNING PRINCIPLE

K

“

Isn't this just  
manipulation?

K

THE ANSWER

Every one of these tools  
fails if the thing is not *true*.

Not persuasion techniques. Removal techniques — each one takes a threat cue, a load, or a defense out of the way.



ACT FOUR

# How *you* coach it.

Scaling behavioral insight beyond your own conversations —  
without distributing scripts.



# Four layers to coach from.

01

Neural & narrative

Are they telling, or inviting?

02

Cognitive systems

Which subsystem got skipped?

03

Bias management

Surface read, or bias read?

04

Conversational design

Did they leave the silence?

THE SENIOR LEADER'S MANDATE

Coach the *framework* .  
Not the words.

A team that can diagnose a conversation you never heard, with a donor you never met.



## THE BELIEF SHIFT

# The instrument is the sentence.

### OLD ASSUMPTION

Planned giving is a technical discipline.

Get the vehicle right, explain it clearly, and the gift follows.

### NEW GOVERNING BELIEF

Language is the primary instrument.

The words change how donors perceive the opportunity. Language is how you earn the technical conversation.



# Four commitments for the *conversation*.

## Be ready.

Preparation is what lets you hear the transition instead of waiting for your turn to talk.

## Be helpful.

Reciprocity is the only thing a nervous system accepts as proof.

## Be curious.

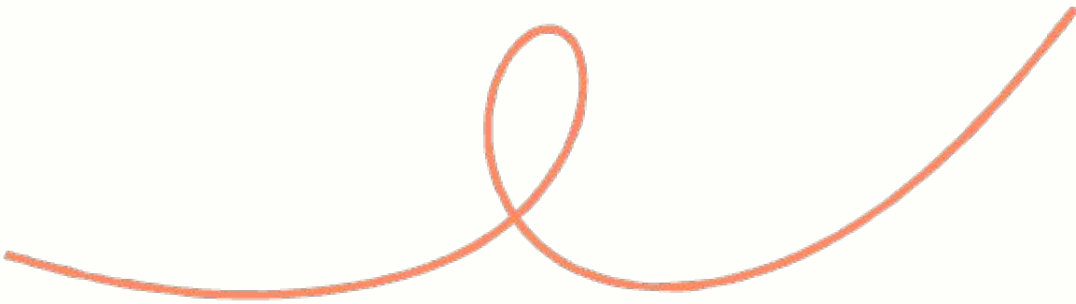
Every second they talk about themselves, their brain rewards them for it.

## Be brave.

Somebody in your portfolio is waiting for a question nobody has been willing to ask.

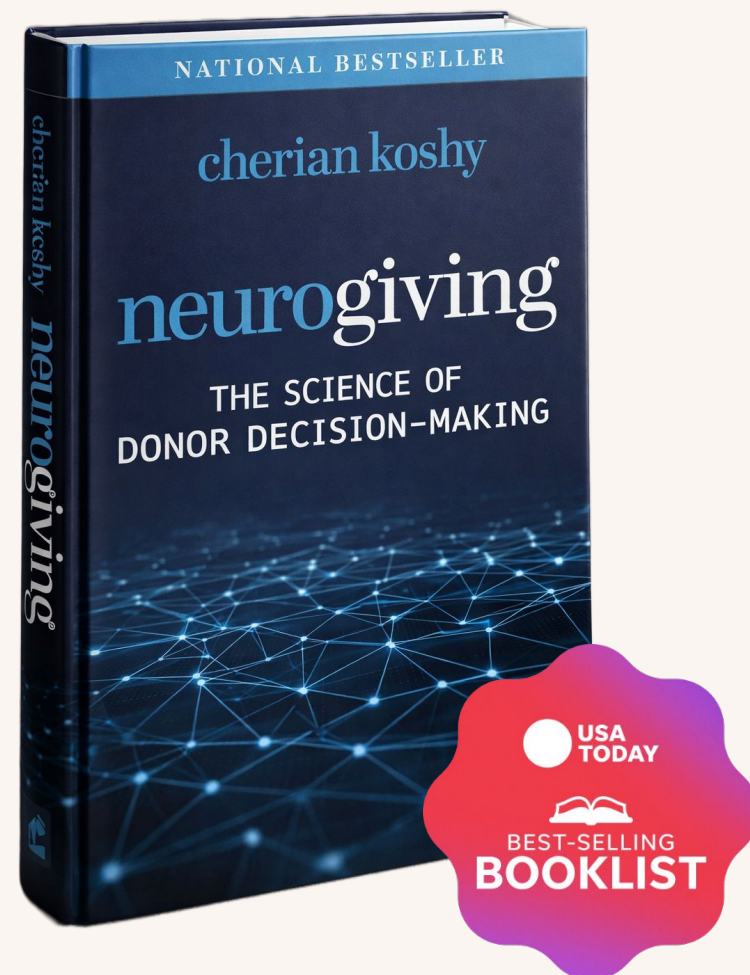
They will not  
remember the  
~~percentage.~~

They will not  
remember the ~~vehicle~~.



They will  
remember that you  
asked what they  
wanted to t

# Thank *you!*



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