

LOOKING

FOR YOUR NEXT

PLANNED GIVING MARKETING

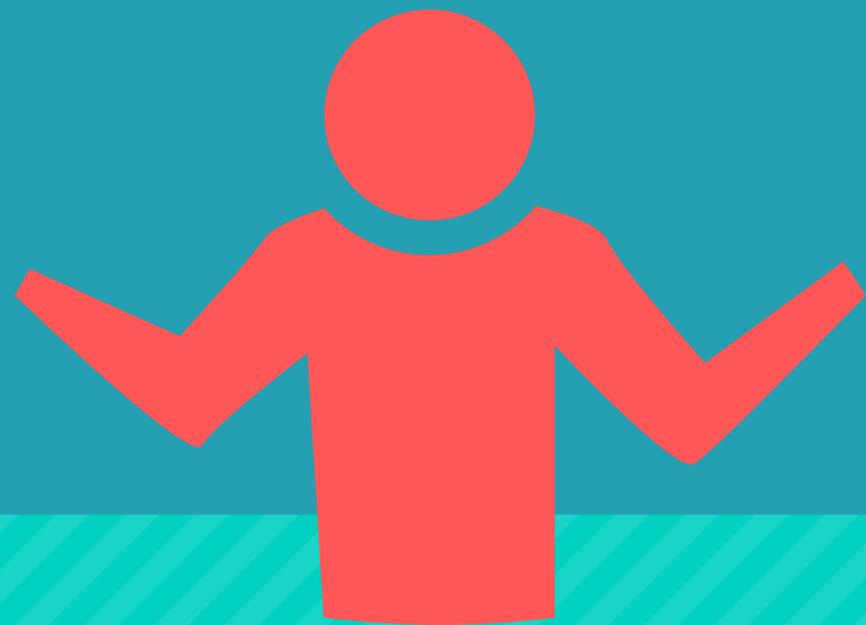
STRATEGY?



Looking for your NEXT PLANNED
GIVING MARKETING strategy?

think SMALL

“Small? Really?”



-- asks the
skeptical fundraiser

“YES! To reach quality prospects - small-batch marketing gets results.”



-- replies the planned giving marketing specialist

The **SMALLER** your prospect
group, the **BETTER**.

if you try to
reach **EVERYONE**,
you'll reach
NO ONE.



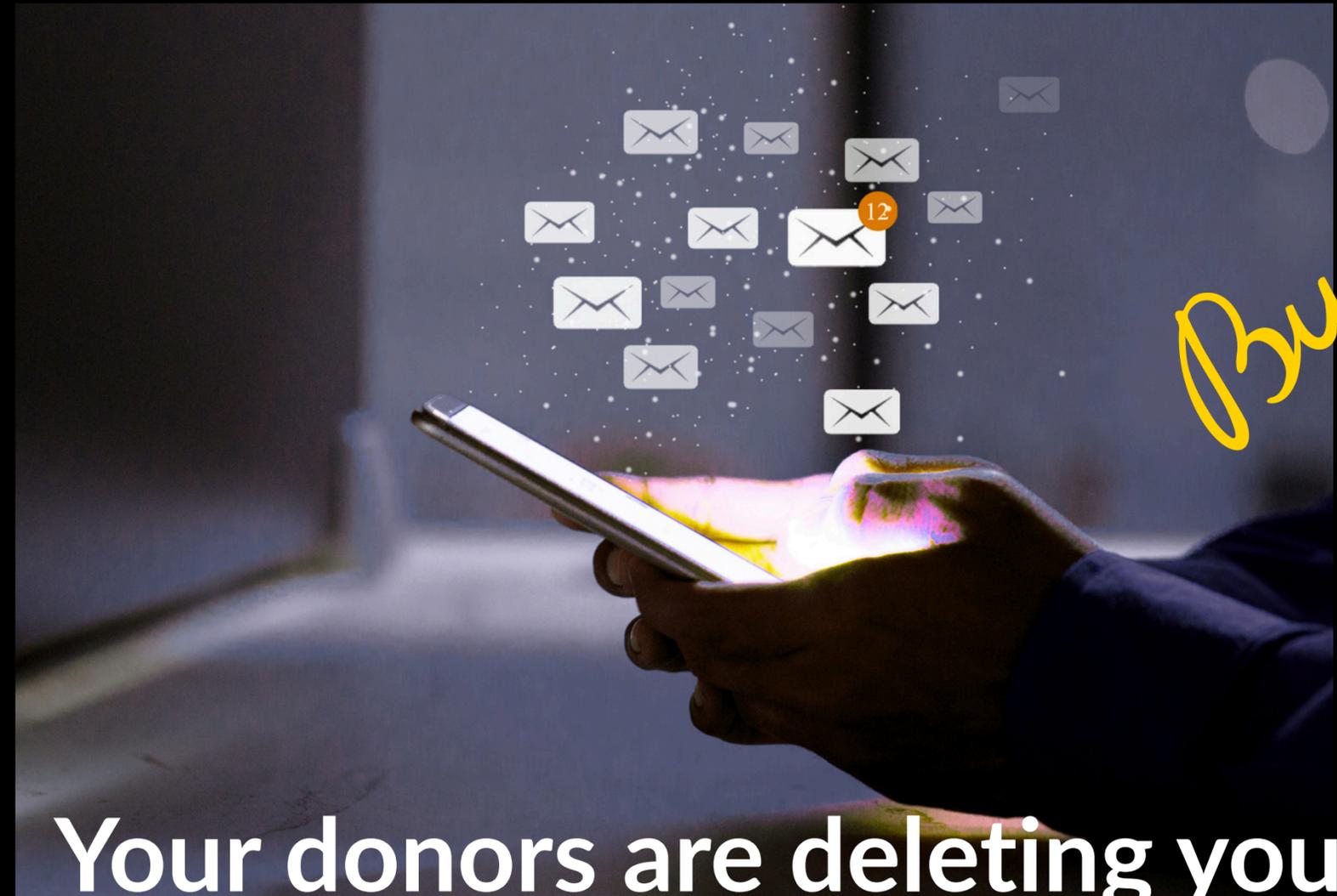
Especially
with email



Email *Fatigue* is real

28%

Open
Rate



Bye

Your donors are deleting your nonprofit's emails.

A **SMALL-BATCH** mail project
sent to a **SELECT** prospect group
GETS RESULTS.

THINK small



Small-batch is a nifty idea!

IT'S:



Hmm, what's
this?

your top prospect

- Personal & Targeted
- Unexpected & Interesting
- Nimble & Manageable
- Replicable



How do you do it?

It's not that hard!

1

**Identify a peer
group.**

example:

**Volunteers with 10+ years
giving history**

2

**Identify a peer
already in your
LEGACY SOCIETY.**

example:

LINDA is a

society member and volunteer.



3

Get in touch with Linda.

Ask if her if she'd be
willing to help by
“authoring” a letter.



Linda Says YES!

Hi,

I'd be happy to help.

Let's talk Friday
around noon.

Best,
Linda



helpful peer, Linda

step 4:

Share with her that you'll write a letter she'll approve - to be sent to longtime donors who are also volunteers.

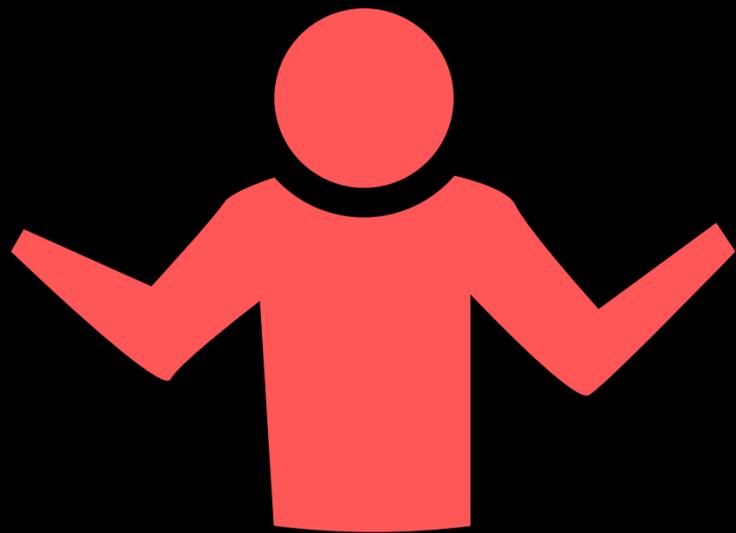
5

Write the Letter

Then, Linda
approves it and
signs it.



*“What does the
leттter say?”*



-- asks the fundraiser in
charge of planned giving

Basically, the letter says:

- I'm a volunteer like you.
- I've put (nonprofit) in my will.
- I feel good about it.
- Is this something you'd consider?

The peer letter
looks something
like this





Dear Mary Ann,

I am writing to you today because, like you, I am a former volunteer at the Arts League, and I have just volunteered to help the League's Development Director, Bernadette Graham with an outreach project.

A few months ago, I updated my estate plans and included a gift in my will to benefit the Arts League. I had been putting this off forever, but now I am glad I did this and feel very good about making a gift for the future of the arts in our town of Burlington. I was also invited to join the Arts Forever Legacy Society and am looking forward to the Legacy Society's spring lunch.

If you are considering a gift in your will or another type of planned gift, I am enclosing the information you will need to share with an attorney or with an online will writing program. I am also enclosing a gift interest form, and if you could please return that in the envelope, the League would be very appreciative.

Also enclosed is contact information for Bernadette, the League's Development Director. She was so helpful when I was making my plans and if you have any questions, just give her a call or send her an email.

Thank you for being an important volunteer, and for all your gifts over the years.

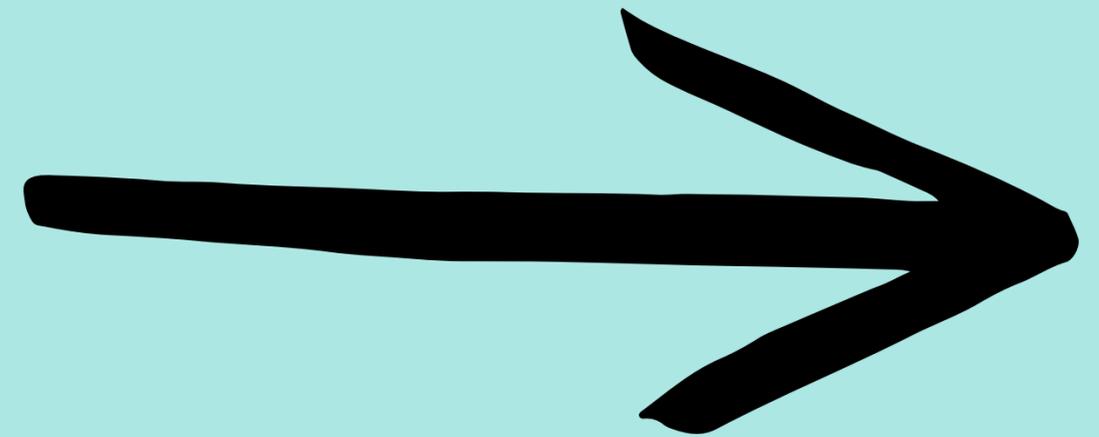
The arts will live and thrive in Burlington because of you.

Sincerely,

Linda Hyatt
Past Volunteer & Member, Arts Forever Legacy Society

305 Rushmore Street
Burlington, NC 27989
LindaH343@gmail.com

Hard to read? Is this better?



The Peer Letter



Dear Mary Ann,

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Sincerely,

Linda Hyatt
Past Volunteer & Member, Arts Forever Legacy Society

305 Rushmore Street
Burlington, NC 27989
LindaH343@gmail.com

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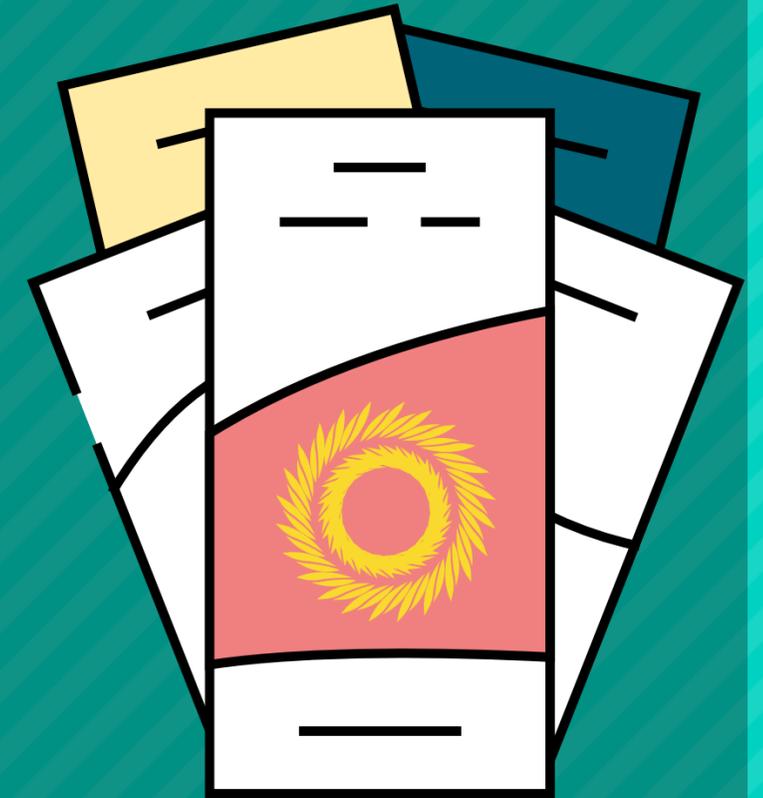
Send the Letter

“How many is a small-batch?”

25-100 prospects

Segment longtime & lapsed loyals -
narrow/broaden til you find a decent
number of prospects.

What will you include with the letter?



Brochure, intention form, interest form, info forms, business card, rack card, small gift?

Up to you. Just make sure to refer to it in the letter!

**A SMALL-BATCH mail project
is your NEXT planned giving
marketing project.**

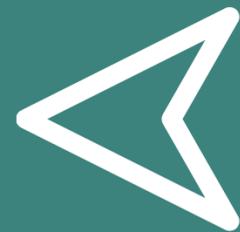
It's highly replicable, too.



Other ideas for small-batch mail projects!



Select supporter survey



Think about a board project!

You can do this yourself.
Or hire us for a
surprisingly
AFFORDABLE cost.



Would you like to
learn more about
SMALL-BATCH



Planned
Giving
Agency

planned giving marketing?

VISIT our website
& CONTACT US
pgagency.com





pgagency.com