

We'd like to create a new legacy leaflet...

10 KEY STEPS and some questions to ask

(With a handy summary of key take-aways at the end)



1 - Internal landscape

Have you secured permission / appropriate resource to produce the leaflet?

Are the other teams (if any) you will need to be involved aware and engaged?

How will this leaflet sit in terms of existing wider comms/materials?

2 - External market

Have you reviewed what competitors are doing?

Do you have any market / audience insight you can use to inform the process?

How to be sure you leverage positive brand profile and assets

3 - Vision & Mission

How does leaflet express wider organisational vision/mission and fundraising case for support?

How does it express your legacy vision/ambition?

In what ways does it showcase the unique potential impact/benefits of a legacy gift?

4 – Donor-centred

Is your leaflets specifically targeted at a particular audience or generic?

Does your leaflet put your donor's needs first?

How does your leaflet reflect your donor's potential motivations to leave a legacy gift?

5 - Strategic approach

Is a leaflet the right thing to do?

How does your leaflet support your wider legacy strategy?

What's the key strategic aim of your leaflet? Awareness/lead generation/conversion?

Is the call to action / next step clear to the potential recipient?

6 - Compelling communications

Does your leaflet have an emotionally led proposition?

Are you using storytelling well? (Dr Russell James hero/epic call to action research)

Are you using case studies well to normalise / show impact etc.

Given strategic purpose, what form (confetti; bi/tri-fold; booklet) is most appropriate?

7 - Clear tactics

Who is the target audience? How best can you reach them?

Where will your leaflet be distributed / displayed?

What barriers might there be to distribution and how can you overcome them?

8 - Network and influence

How will others be involved in the production / distribution of your leaflet?

Have you built relationships to remove barriers/create opportunities to/for promotion?

Are there any existing external partners who could or would need to be involved?

9 - Income Management

Should your leaflet include legal/admin related content?

If appropriate, who will provide/check this?

Are you striking the right balance between inspiration and process given strategic aim?

10 - Measure and Communicate

How are you going to measure the impact/effectiveness of your leaflet?

Can you track the number of leaflets ordered/distributed at source?

Can you track which routes to market are more successful? (source coding and capture)

How will you report on the overall effectiveness of the campaign/leaflet?

SUMMARY – any legacy leaflet should:

Align with your wider organisational brand / case for support

Be supportive of your overall legacy strategy - be clear what your purpose is

Allow form to follow function – objective / purpose / point in journey etc.

Be vision and mission led – legacies are about the future

Put inspiration before will writing mechanics – unless promoting will writing!

Be donor centric – put supporters and their needs first (rather than talk about yourself)

Think/express legacy giving in the widest sense – life; loves; value; purpose and meaning

Be emotionally engaging – build on their potential motivation(s) to support

Show potential personal impact – broad project themes/examples (to avoid restriction)

Build trust/demonstrate efficacy – share successes stories

Normalise legacy giving – use case studies to show that 'people like me do things like this'

Have a clear call to action – what do you want me to do next / where can I do that?

Include mandatories – RCN; GDPR statement (if response mechanic); source code etc...