

# Activating a Direct Response Database to Increase Planned Gift Leads

## THE CHALLENGE

This international humanitarian organization had a very large database of generous and loyal donors, and a small planned giving staff. They wanted to increase planned giving leads and identify the most viable prospects, without significant investment in additional staff.

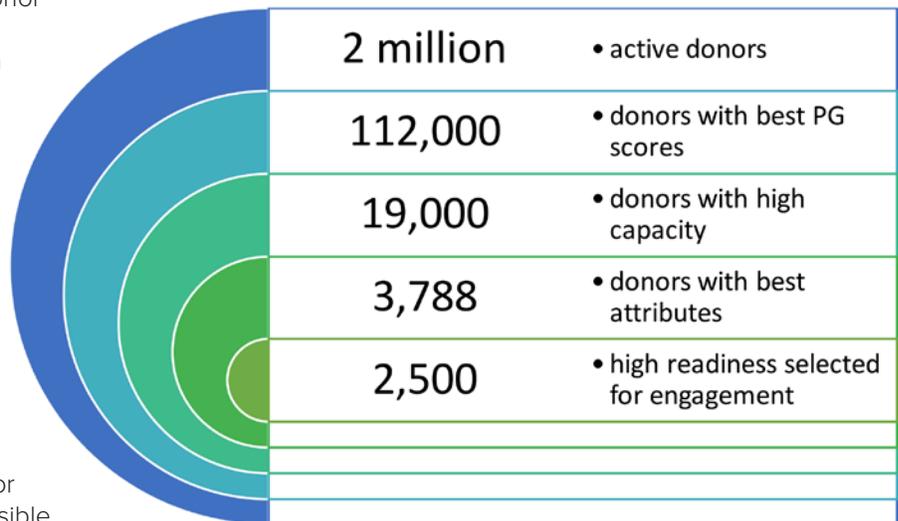
## THE SOLUTION

Use a tiered, multi-channel approach based on donor value to develop an efficient Planned Giving Pipeline that delivers quality leads and stewards existing donors.

### PHASE 1 Discovery



- In-depth SWOT analysis, benchmarking them against comparable organizations to determine overall PG potential
- Modeled for 3 PG vehicles: Bequests, Gift Annuities, and Charitable Remainder Trusts
- Using proprietary Dynamic Donor Identification process, 19,353 planned giving prospects with high scores for all 3 estate planning vehicles were identified



### PHASE 2 Selection



- 19,000 Donors were targeted for planned gift mail/email
- 3,788 donors were targeted for portfolio qualification and possible Ambassador cultivation
- 2,500 selected for phased Ambassador cultivation

### PHASE 3 Communication and Cultivation



- THD Ambassadors (people who are trained in direct prospect engagement AND are also highly knowledgeable about our client's mission, vision, and programs) connect with prospects by phone, through personal notes, and via email to develop relationships and gather information
- Personalized communication strategies are developed for each prospect to ensure ongoing communication and cultivation
- Key information is collected and is utilized to further the relationship with each contact

## PHASE Assessment & Analysis

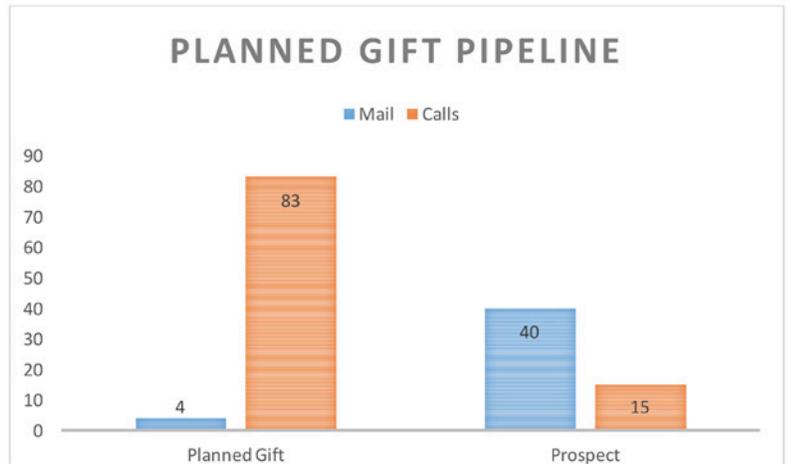
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- Marketing results are used to refresh Ambassador cultivation audiences
- Planned Giving marketing responses provide data for refinements to tactics and messaging

## Program Results (in first year)

A process of routine cultivation produced a much greater number of planned gift commitments than was produced by mail alone:

- Uncovered 87 intended planned gifts, **95% of which were identified by phone**, allowing the client to continue to cultivate and steward these donors.
- Identified 55 prospects for follow-up by a Planned Gift Officer. 27% of prospects were identified by phone.



## Key Takeaways

- Increased prospect and planned gift identification utilizing existing donor database;
- Established an ongoing engagement plan for individual donors that is highly personalized and fluid;
- Refined Planned and Major Gift Officer portfolios to improve quality of donor prospects;
- Stewardship for previously neglected PG donors preserves engagement and increases likelihood of gift fulfillment;
- Identification process supported advocacy for increased investment in planned giving program for future growth.

### About t|h|d

Founded in 1989, THD is a full-service direct marketing agency specializing in integrated fundraising and membership programs. We help nonprofits advance their mission through programs that maximize revenue, increase awareness and motivate action.

THD is 100% focused on serving nonprofits and raises over \$500 million in annual philanthropic support.

Our Donor Advancement practice was established in 2008 in order to provide comprehensive support and stewardship to this increasingly important donor group. This in-house team of professionals brings specialized focus to mid-level programs on behalf of our clients.

To learn more about the Donor Advancement practice at THD, contact Eric Johnson at [ejohnson@thdinc.com](mailto:ejohnson@thdinc.com) or at **781.859.1482**.