

Words that Work

Money for Ministry's Guide to Understanding Your Funnel

Every donor is a planned giving prospect, but each person is at a different spot in their journey. We recommend creating content that targets each of these three types of people, understanding they have varying degrees of familiarity with planned giving – some are barely aware of the concept, others are actively showing interest, and the final group are ready to give a legacy gift (or have already included you in their will).

- 1. Awareness.** Roughly 85% of your donor base is not even AWARE of legacy giving and yet many planned giving approaches jump straight to an appeal. This is why Money for Ministry always stresses ***lead with inspiration and follow with information***. This huge “Awareness” sector of your donor base is often busy with their children, grandchildren, and everyday life and simply aren't thinking about a planned gift yet. ***You have to address this group by speaking to their felt need.*** They want peace in their family. They want to feel secure about the future. Messaging addressing this crowd should be very light on mentions of planned giving terminology and techniques, if at all. Instead, begin building a picture of how planning for the future will help them live their faith and personal values, and take care of their family well. ***You want to connect with their heart...something technical language and tips just can't do.***



- 2. Interest.** This crowd understands what a legacy gift could do for your organization and the people you serve. They are open to considering a gift. Our research shows this is about 10% of your audience. ***Do you have messaging that continues the conversation around values, faith and family – but also begins to trickle in actionable steps they can take to create or update their will and get their house in order, or tools they may want to consider for giving?*** You can begin to spell out the benefits of Donor Advised Funds or Charitable Gift Annuities, but the goal is to continue to package this information in a warm and compelling way.
- 3. Action.** Less than 5% of your donor base are currently in this category – people who have already taken action to include your organization in their will or estate plan. Your goal with this crowd should be to **continue nurturing communication that:**
 - Reinforces your gratitude for them
 - Provides them with valuable ministry insights
 - Keeps your relationship strong

To discover how you can position yourself for maximum planned giving impact, contact Money for Ministry. We'll help you create a comprehensive plan to speak straight to your donor's heart.