



Planned Giving Boot Camp White Paper

Marketing Messaging for Your Supporters

Planned giving messaging is all about consistently communicating with your supporters on how a planned gift can help them further the vision and impact of your ministry. Here are five do's and don'ts of planned giving marketing messaging.

Do: Deepen the Connection

Don't: Focus on the Planned Giving Tools

Too often we skip straight to the information about planned giving opportunities, forgetting that this is NOT why people are giving to you. They're not giving to you because it'll save them on taxes. They're giving because they love your mission and believe in what you do.

Make sure every planned giving message you send is couched in a broader conversation about why giving to your organization matters. Reiterate your vision and the incredible impact your supporters can have by making a gift to your organization.

Do: Use Donor-Centric Language

Don't: Make It About You

You want to establish your supporters as the heroes, not the helpers. This is about painting a picture of how they can be a part of God's story. God works through His people.

Example:

"Give to Ministry Dig-a-Well so we can help more families who need clean water."

vs.

"Your gifts provide clean water to families who so desperately need it."

Do: Communicate Like Family

Don't: Use Jargon, Contractual Tone, Acronyms, Legalese

Your regular supporters who have given to you multiple times are demonstrating that they are becoming like family. Your communication should reflect that relationship and be warm, relaxed, and in a conversational tone.

Use common words and phrases with your supporters instead of terms that may be new to them. For example, "gifts in a will" instead of "bequests." Or, instead of saying something is "revocable," say, "you can change your mind."

Do: Keep It Simple

Don't: Overwhelm With Details

Your goal is not to give people so much information that they can complete the gift on their own. In many cases, it will only overwhelm them. Instead, it is to pique their interest and get them to talk to you. You can then work together to find the specific solution that fits their goals and circumstances.

Do: Illustrate Social Norms**Don't: Under-utilize Supporter Stories**

You want to illustrate what smart and generous people do. Whether we'd like to admit it or not, we make many of our daily decisions based on what is socially acceptable. But since planned gifts are rarely part of everyday conversation, people have no idea what other generous people do. Your marketing should help them see: "People like me do things like this."

Studies have shown that testimonies are a sure-fire way to illustrate this social norm. Use Stories and photography to help your supporters understand and reflect on how others in their Circumstances have made planned gifts.

Do: Talk About Building a Legacy and Peace of Mind**Don't: Talk About Death**

It shouldn't come as a surprise that people don't like talking about death. Yet that's been the lead for many conversations about estate planning. Instead, lead with different ways people can give and appeal to what people want to accomplish during their lifetime and how they hope to be remembered.

One of the strong motivators for completing a plan is the anxiety of an uncertain future. By completing their plan, people often feel a great sense of relief and peace of mind.

Additional Resources

Barnabas Foundation resources are available to assist you in following these "Do's" and "Don'ts." If you aren't already doing so, be sure to access the quarterly marketing plan and other resources at members.barnabasfoundation.org/login.