11 Great Marketing Ideas for 2011

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A panel discussion featuring:

Moderator: Claudine A. Donikian, JD, MBA – president & CEO, Pentera, Inc.
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Claudine is the president & CEO and chief marketing officer of Pentera, Inc. She oversees all aspects of Pentera's business and marketing strategies, as well as new-product development, with an emphasis on digital marketing. She advises a select group of Pentera's clients about marketing and eMarketing best practices and is a consultant to top planned giving departments such as Pomona College. Claudine is a sought-after speaker on the national planned giving and AFP circuits. She also writes and conducts training modules for Pentera seminars. Claudine directs Pentera's integrated marketing department, which includes both the interactive Web and print departments. Under her leadership, the interactive department and client base tripled in size.

Panelist: Vince Fraumeni – principal, VJ Fraumeni Fundraising Consultants
vince@fraumeni.com

Vince Fraumeni is a fundraising consultant, a professional speaker, and the principal of V. J. Fraumeni, Fundraising Consultants. He has accumulated over 29 years of professional fundraising experience and has raised over $55 million in major and planned gifts. Vince works closely with professional staff, volunteers, and donors to promote increased awareness of planned-giving opportunities and close gifts. He is a frequent speaker at conferences, seminars, workshops, and council meetings. He is a founding faculty member of the American Institute of Philanthropic Studies, has written and published about donor cultivation, solicitation, and marketing, and is a regular contributing author for national planned-giving publishers. Vince is also a past member of the board of National Committee on Planned Giving and past president of Planned Giving Roundtables of Southern California, and Orange County. He is a member of AFP Los Angeles Chapter and serves on the Board of Directors, AFP San Fernando Valley Chapter. Vince won the Outstanding Professional Award AFP San Fernando Valley Chapter and is a member of the LA 5 Rotary Club, Paul Harris Fellow-Rotary Club International Foundation. His hobbies include golfing, traveling, cooking, and wine tasting, and he has visited over 185 different wineries in California! Vince is also an Eagle Scout!

Panelist: Ben Harrington – director of gift planning, Methodist Hospital Foundation
bfharrington@earthlink.net

Currently Ben consults with churches and non-profit organizations to help them strengthen their gift planning programs. Prior to fundraising, Ben spent 44 years in the grocery business, advancing from bagger to company president. Thanks to his former employer, Ben and his family are blessed. He decided that it is important for him to give back through serving the non-profit world. Ben and his wife Flo live in Arcadia and Huntington Harbour, California. They have six sons, one daughter, six grandchildren, and two great grandchildren.

Panelist: Jay Harvill – director of gift planning, Methodist Hospital Foundation
jay.harvill@methodisthospital.org

Jay Harvill, director of gift planning at Methodist Hospital Foundation, has been with the foundation since 2005. With more than 20 years of experience in finance and gift planning, Jay has completed studies as a certified financial planner and graduated from Pepperdine University's Seaver College. Jay serves on the board of the Planned Giving Round Table and is a past chapter president. He has also served as committee chair of the Western Regional Planned Giving Conference and National Philanthropy Day. Jay is an active member of Arcadia Rotary, the Fiduciary Round Table, the San Gabriel Valley Estate Planning Council, and he serves on the board for San Gabriel Valley Habitat for Humanity.

1. Cost-Effective Marketing Strategies

Q: **Vince**, I know that you are a strong advocate of cost-effective marketing strategies. Where do you suggest we begin?

- Agencies need to look at their existing communications systems first. Systems such as
  - Quarterly newsletters
  - Journals
  - E-newsletters
  - Annual fund solicitations, etc.
- Develop ways to promote planned giving through each of these vehicles already in publication.

2. Keys to Marketing Success

Q: **Jay**, marketing is such a broad term and encompasses so much. Can you provide some big-picture marketing tenets that can help us narrow the focus to what is truly essential; that is, the keys to marketing success?

- **Keep it Simple.**
  - Easy to put together, easy to read, easy to get to the message, easy to respond.
  - Powerful and effective.
  - Allows GP professional to be out in the field doing his or her job and meeting with folks.
- **Short and Sweet.**
  - In most cases, keep the message short.
  - Make sure the reader can get your message, or hook, in 3 seconds.
- **Different is Good.**
  - Have the marketing reflect who your organization is. Make it personal.
  - When somebody gets your marketing piece, he or she should immediately recognize where it came from.
- **Service, not Selling.**
  - Our efforts at marketing, no doubt, are to attract gifts to the charity. But it's also to serve our constituents and provide them with vital information that will help them make wise decisions, financially and charitably.
  - Make sure your marketing material doesn't feel like the local card from Macy's.
- **Tailored Suits.**
  - Marketing costs money and we've only got so much to spend on it for the year. So, spend time identifying your best constituents for the purpose of your marketing. Carefully comb through your organization's donor database and other lists from research.
- **Stay the Course.**
  - Changing course with every new wind gust won't get your boat (program) anywhere. The focus of your marketing should have a long-term perspective.
  - There's nothing wrong with reacting to occasional surprise opportunities, but keeping focused on your ultimate destination will pay off in spades.

3. Thanking Donors Is the most Important Thing you can Do.

Q: **Ben, it's well-documented in research** that two of the top reasons donors stop giving to an organization are being over solicited and not being thanked. Can you talk to us about the importance of thanking and stewarding donors and also about how to go about doing it?

- Developing a culture of appreciation
  - The issue of over solicitation
  - Consider a NO ASK fundraising strategy.
  - Put your board members to work.
  - Pitfalls

4. Connecting with Donor Prospects

Q: **Jay**, you're doing this day in and day out. What are some practical tips you can share about how to connect with donor prospects that the attendees can go back to the office and implement right away?

- **Make it personal.**
  - Customized letters to select constituents with hand signatures.
  - Personally written note cards (hand-addressed and stamped) after visits, for birthdays and other special occasions.
  - Personal phone calls to greet on a special day.
  - Face-to-face interactions with your constituents.
  - There is simply nothing better and more effective than the effort a donor sees in you paying a visit.

5. Successful Programs' Best Practices

Q: **Vince**, what are some of the secrets you've uncovered that make the most successful programs successful?

6. Why is Branding Important?

Q: **Jay**, we hear the term "branding" all the time, and one might assume that branding is established by other departments and so is taken care of already. But why exactly is branding so important to planned giving?

- **Consistency in unique look, feel, and message**
  - Branding makes a common thing or service unique and special.
  - Make sure your brand is consistent with your organization's style guidelines and branding standards.
  - Test the brand with movers in your market and inside your organization.
  - Apply branding to all possible marketing materials, to build awareness and familiarity.

7. Don't Forget the Basics

Q: **Vince**, we can and should talk about all of these important topics like branding and connecting. But sometimes it's easy for even advanced practitioners to lose sight of the basics. Do you find this to be true? And if so, can you share what exactly the basics are that we mustn't lose sight of?

- Need to recognize who audiences are and how they collect information. No longer one-format-fits-all.
  - For most senior audiences that include the WWII generation, post-depression, depression, and pre-depression survivors communicate through mail and with personal calls.
  - For the baby-boomers (oldest now age 65, trust me), many are communicating by e-mail and would rather receive an e-message and attachment as follow-up to personal call or visit.
  - Many are on Facebook and LinkedIn.
  - Charities need to consider all formats in order to reach as many prospects as possible.

8. Total Dollars Raised Versus Moves Made per Prospect

Q: **Ben**, would you please talk to us about the concept, "total dollars raised versus moves made per prospect"?

- Every non-profit organization wants to turn prospects into donors.
- What is Moves Management as a solicitation strategy?
- Your database is only as good as the information entered into it.
- Goal setting

9. Establish Quantifiable Benchmarks to Gauge Progress

Q: **Ben**, we know 80% of planned gifts come from bequests, which means the organization won't see any "revenue" for some time. I know I speak to people frequently about their struggles with quantifying success. So how do you recommend establishing quantifiable benchmarks to gauge progress? How do you recommend doing it in planned giving?

- Begin with a foundation of solid goals and objectives.
- It is important to define what success is.
- Tracking solicitation actions
- Examples of solicitor evaluation criteria

10. New Year Brings Tax Law Changes and IRA Opportunities

Q: **Jay**, the 2010 Tax Act was passed on December 17, 2010, and the new laws had some important ramifications for estate and gift planning, namely brought about the exciting and beloved IRA opportunities again this year, but not everybody truly understands exactly what they are. Would you talk to us about the highlights?

11. Conclusion

- Importance of knowing your audience and how to communicate with them
- Especially important are those most senior groups who need to feel that they are still in control of planning their destiny.
- Nothing will ever replace personal contact, listening to donor needs, and helping donors find a way to take control and make gifts that meet THEIR economic and philanthropic objectives.