



Marketing Funnels

KLT &

Fully Devoted Fans





Welcome



Jill Rode, CFRE
Music Academy of the West



Andy Ragone, CGPP
Crescendo Interactive

Marketing Funnel Strategy

Deiss, Ryan, *Invisible Selling Machine*

Godin, Seth, *This is Marketing*

Johnson, Brian, *Trust Funnel*

Burns, Ralph; Powell, Amanda, *Perpetual Traffic Podcast*

Pittman, Molly, *Click Happy*

Porterfield, Amy, *Podcast and Digital Marketing Academy*

Resources

Cultivation and Stewardship

Olson, Wayne, *Think Like a Donor*

Ahern, Thomas, *Seeing through a Donor's Eyes*

Godin, Seth, *Tribes: We Need You to Lead Us*

Discovery and Affinity

Greenhoe, John, *Opening the Door to Major Gifts: Mastering the Discovery Call*

Flynn, Pat, *Superfans*

Sagrestano, Brian; Wahlers, Robert, *In the Trenches, Getting Started in Charitable Gift Planning*

James, Russell, *Inside the Mind of the Bequest Donor*

Marketing **Funnels**

Help! I'm trying to do it all... What's the plan?

What are marketing funnels? Why do I need two?

How to put a funnel together: Benchmarks and funnel flow

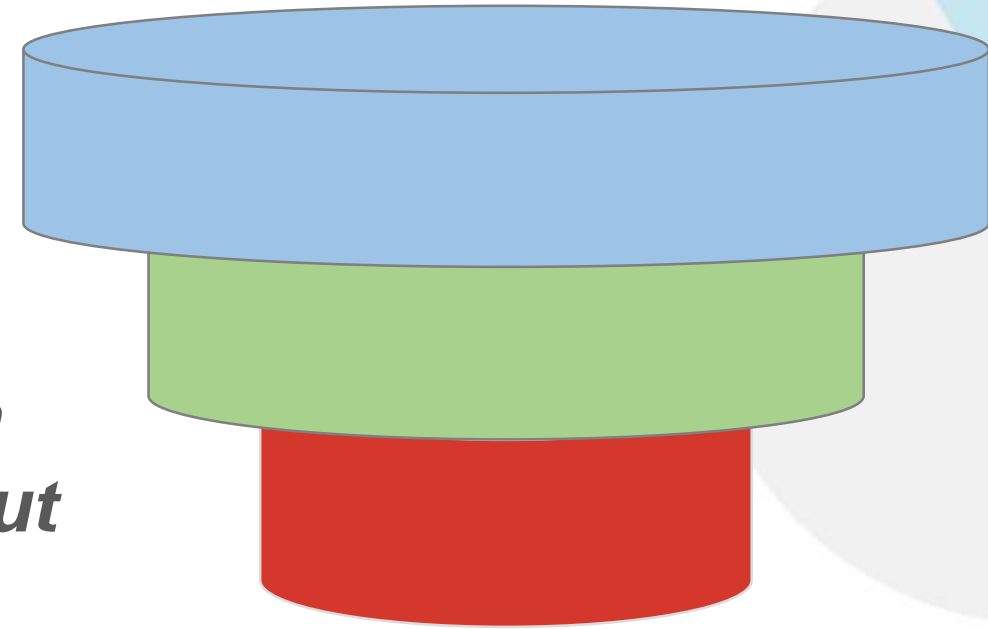


Roadmap

What is a marketing funnel?

“A visual representation of the steps a visitor takes from first finding out about your brand until they convert.”

- Neil Patel



Why **K. L. T.**



Know

Like

Trust

Why Segmentation

*Marrying the right messaging
to the right audience*

- Specific demographic
- Specific stage of life
- Specific “pain points”
- Keep cleaning your lists



**Makes it
Personal**

Why a Marketing Calendar

Marketing Focus: Membership, Webinars, Advocacy, WRPGC

Action/Task	Responsible Person(s)	Estimated Timeframe	Deadlines	Estimated Cost	N
2021					
JANUARY					
enewsletter	Planned Giving Director, Marketing	Monthly		0	
LinkedIn posts	Andy	after each eblast		0	
eblasts	Derek	Weekly		0	Webinars, Advocacy
GM: Jan 21; TBD: added webinar or Mini RT					
FEBRUARY					
enewsletter	Planned Giving Director, Marketing	Monthly		0	
LinkedIn posts	Andy	after each eblast		0	
eblasts	Derek	Weekly		0	Webinars, Advocacy
Post card	Conference Co Chairs			8000	WRPGC
TBD: some version of PG201					
MARCH					
enewsletter	Planned Giving Director, Marketing	Monthly		0	
LinkedIn posts	Andy	after each eblast		0	
eblasts	Derek	Weekly		0	Webinars, Advocacy
GM: Mar 18; TBD: added webinar or Mini RT					
APRIL					
enewsletter	Planned Giving Director, Marketing	Monthly		0	
LinkedIn posts	Andy	after each eblast		0	

Why Marketing Funnels?

“To lead mildly interested prospects to becoming fully devoted champions”

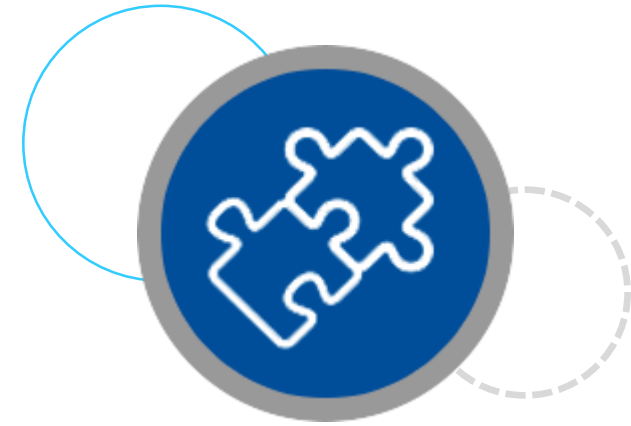
- Match “calls to action” to donor present commitment level
- Defined metrics for clear assessment of donor interest
- Mimics progress found in a real relationship



Types of Marketing Funnels

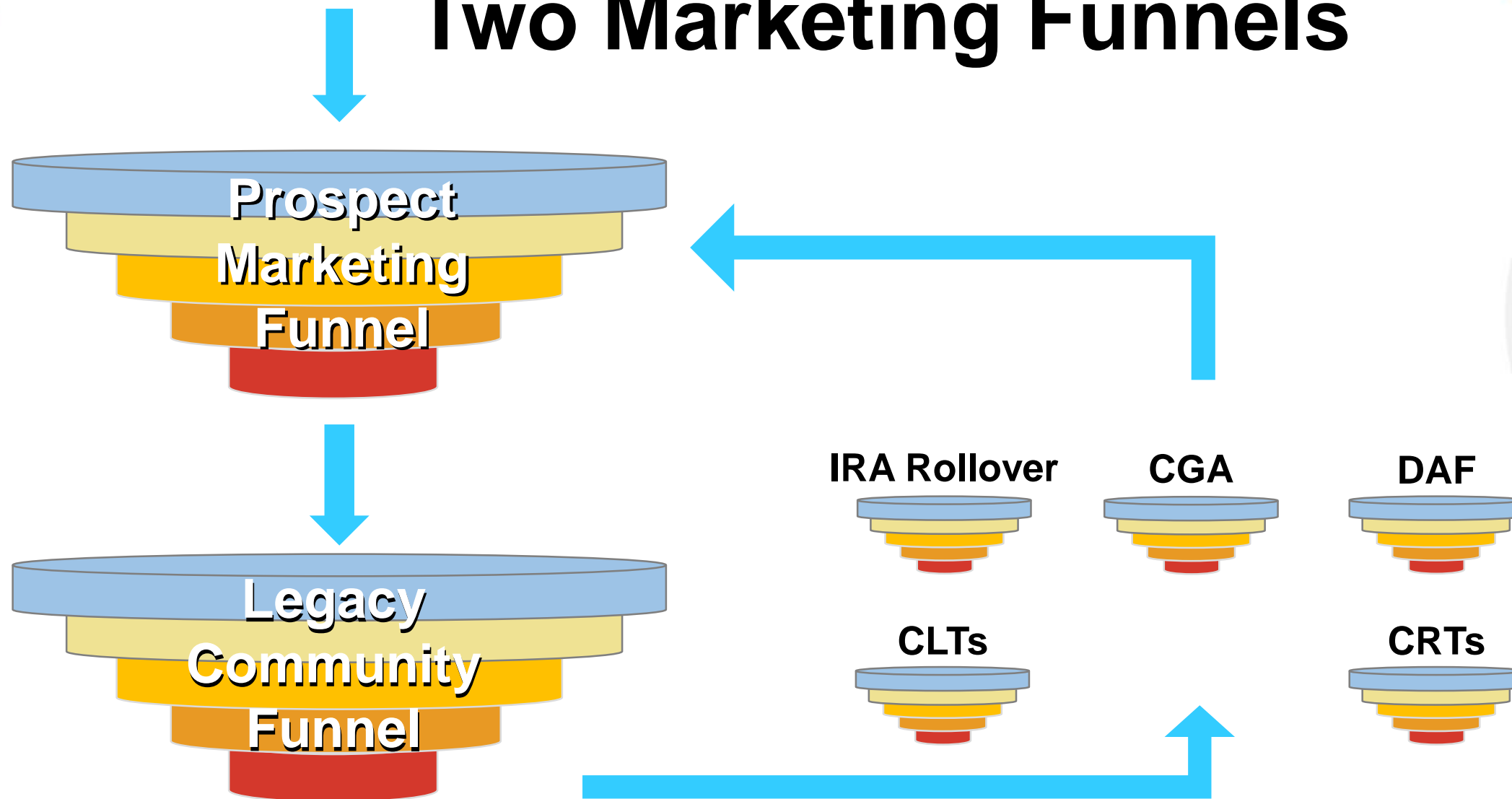
- Prospect funnel
- Legacy/Giving Community funnel

 **Start Here**



Keep it simple.
Simple is sustainable

Two Marketing Funnels



Journey with Your Donors

- Enewsletters/Eblasts
- Print
- Lead Magnets
- Analytics
- Engagement Surveys
- Webinars/Seminars
- Stewardship
- Key Partners Involved

Marketing

Content + Engagement

Personal Meeting

Donor CPR

- Do Your Homework
- Cultivation
- Discovery
- Assessment

Crucial Conversations

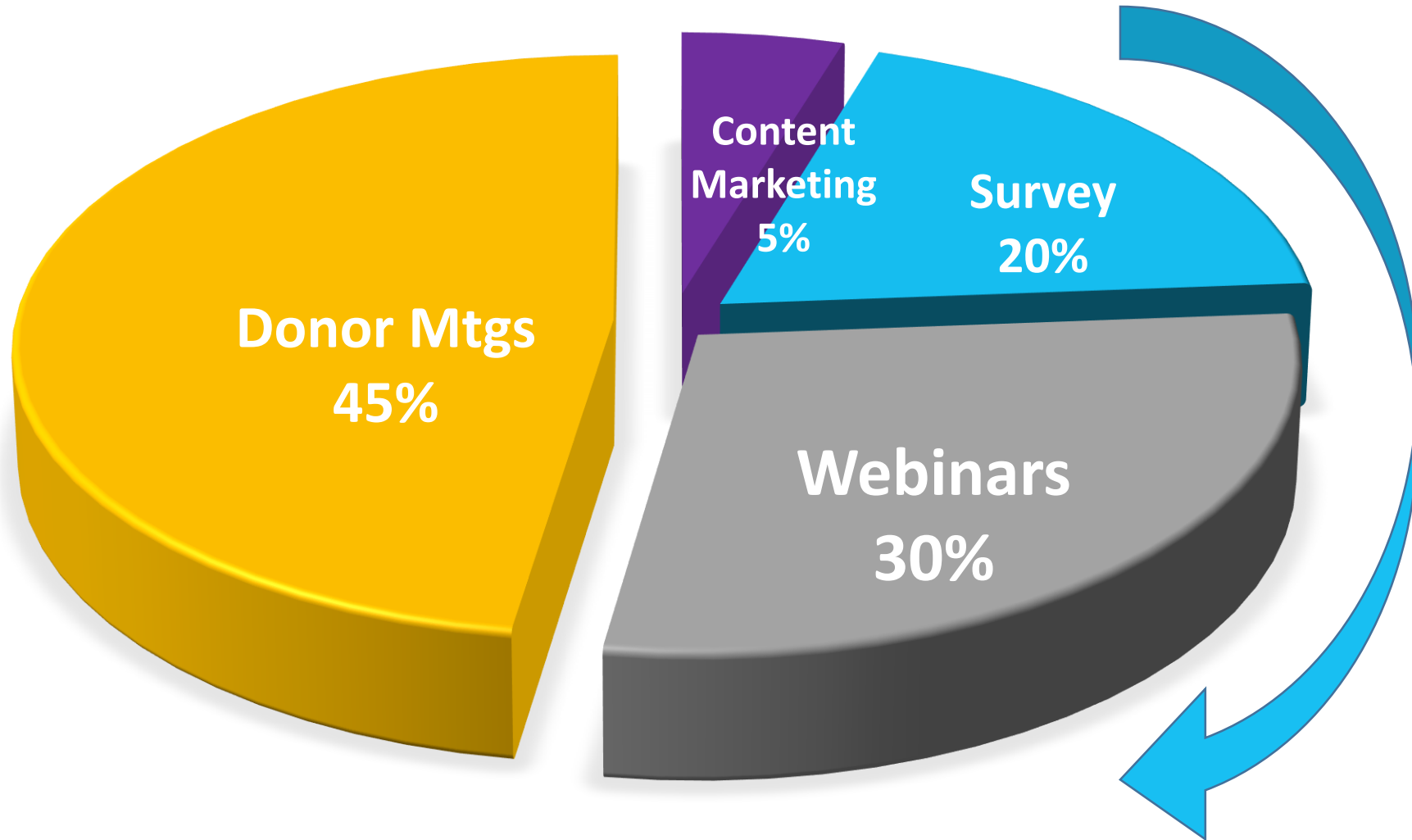
- Matchmaking
- Proposals/Advisor Involvement
- Asks/Overcoming Objections

Conversion

Fewer Getting Warmer



Increasing Donor Interest



Content Marketing

Start Here

Outreach

First: E-Newsletters (Monthly)

Second: E-Blasts (Quarterly/Gift Vehicle)

Third: Print (Budget Permitting – sync with Eblasts)

Optional: Social Media*



Calls to Action

Websites

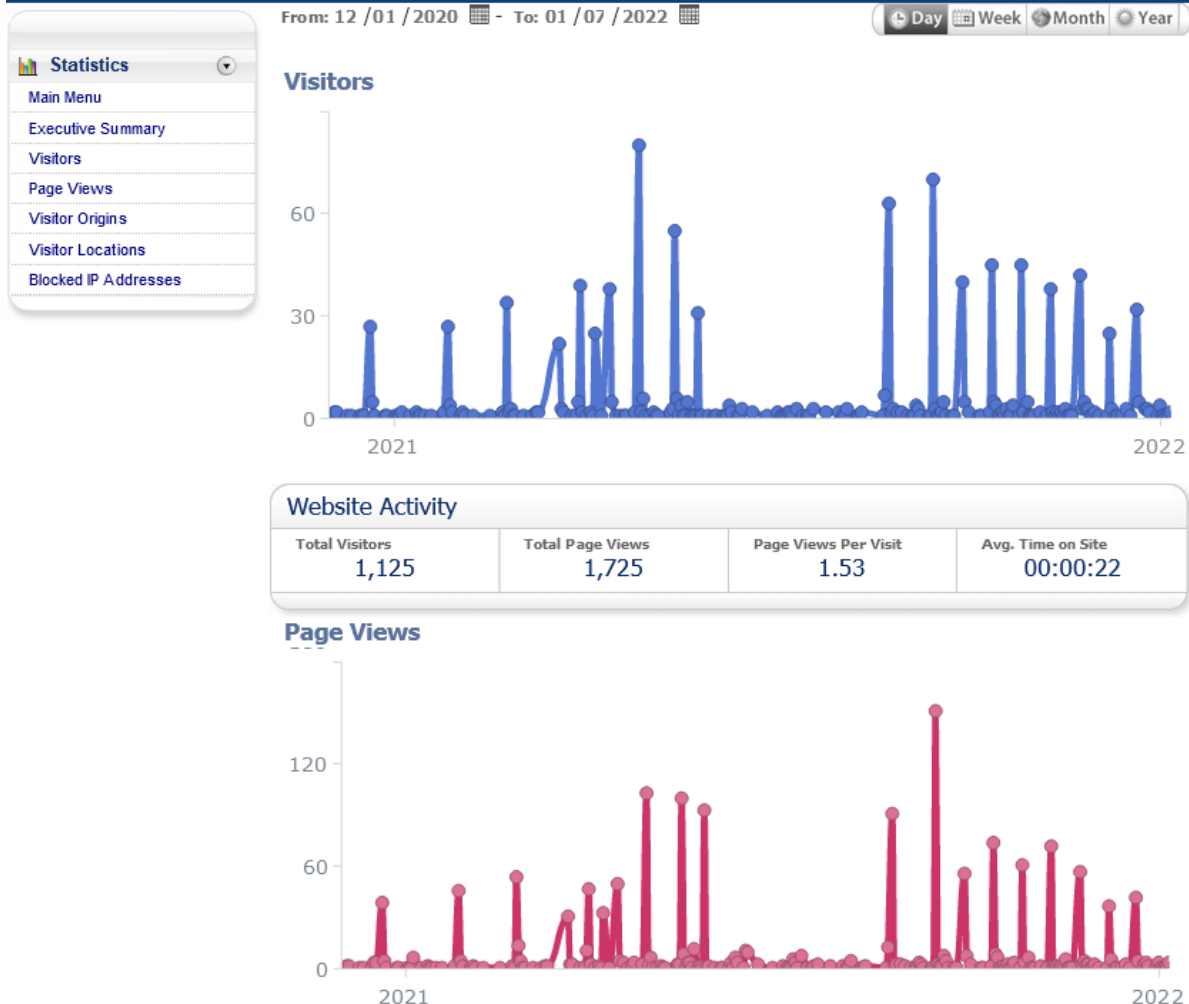
Educational Due Diligence
Gift Fulfillment**



*Depending on what strategies are currently in place

**DAF, Gifts of Stock, Beneficiary Designation Gifts, QCDs

Statistics: the Music Academy of the West



MUSIC ACADEMY OF THE WEST



Encore Society Supper

Each year, since the inception of the Encore Society, the Music Academy has honored its dedicated legacy donors at an annual recognition event. Usually held during the Summer Festival, the *Encore Society Garden Supper* was cancelled in 2020. This year, it's back...and will be held on September 9 in the beautiful campus garden established in honor of all Encore Society members.

Perhaps you have long considered including the Academy in your estate plans. Or, you have already added the Academy but haven't yet let us know. If your inform us of either of these situations, we will happily welcome you into the Encore Society.

The Encore Society Supper is an opportunity to honor Encore Society members' dedication to the Academy and recognize their foresight in making a legacy gift. In addition, it allows us to thank members in person for their support, which has allowed the Academy to grow and flourish.

To become an Encore Society Member and attend the Garden Supper contact me at 805-729-6074 or jrode@musicacademy.org. Invitations will follow by mail to current Encore Society members and those that join the Encore Society before September 1, 2021.



Jill Rode, CFRE
Director of Legacy Giving
jrode@musicacademy.org
805-729-6074 - cell
805-695-7911 - office

eNewsletter: the Music Academy of the West

eNewsletter

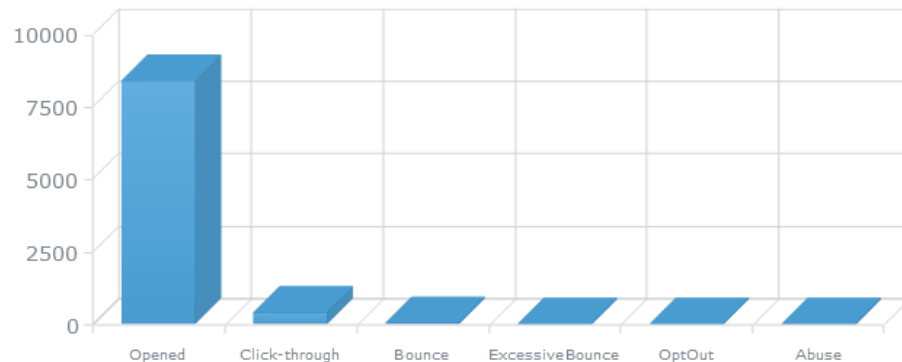
Master Settings
eMail List
GiftCharity List
Statistics



MAW Legacy Enewsletter List - Overview

From: 08 / 01 / 2021 - To: 01 / 07 / 2022

Graph: Overview



Downloads: [Graph Image](#) [Chart CSV](#)



MAW Legacy Enewsletter List

Date	Sent	Opened	Click-through	Bounce	Exc. Bounce	Opt Out	Abuse	View
08-25-2021	2,246	810	62	14	5	5	4	View
09-15-2021	2,233	807	79	7	1	2	1	View
09-29-2021	2,229	966	39	8	0	2	1	View
10-13-2021	2,223	905	55	17	6	1	1	View
10-27-2021	2,215	895	46	32	1	3	0	View
11-10-2021	2,240	997	44	2	2	1	0	View
11-24-2021	2,236	1,197	47	5	0	4	0	View
12-08-2021	2,232	1,034	27	4	2	6	0	View
12-21-2021	2,225	815	42	3	0	2	0	View
Total	20,079	8,426	441	92	17	26	7	



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Your legacy is important. That's why you take time to plan and provide for the people and causes that mean the most to you. If you've included our organization in your will, trust or other planned gift, please let us know. We want to honor you with membership in our legacy society, and more importantly, we want to make sure you're thanked today and your legacy is honored tomorrow.

PERSONAL PLANNER

Chronic Illness - Care of Your Property

If you have a chronic illness, you will need to care both for your person and for your property. Part II of this article will explain some of the specific preparations that are important to care for your property.

[Read More »](#)



SAVVY LIVING

How to Choose a Blood Pressure Monitor

I just found out I have stage 1 hypertension and my doctor recommended I get a home blood pressure monitor to keep an eye on it. Can you offer me any tips on choosing a good one?

[Read More »](#)



Website



Mercy
Ships

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[Ways to Give](#)

[Volunteer](#)

[Stories](#)

[Surgeries & Care](#)

[Who We Are](#)

[DONATE ▼](#)

ALL ABOUT BEQUESTS

Through a gift from your will, you can make a significant impact and further the mission of Mercy Ships to bring hope & healing to the world.

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Measure Donor Interest

Identify Top Prospects

Websites

Educational Due
Diligence
Gift Fulfillment*



Calls to Action

Analytics

Activity Summary
Email Send Reports
Top Interested Prospects



*DAF, Gifts of Stock, Beneficiary Designation Gifts, QCDs

Top Prospects – 60-80%


Integrated Marketing for
Planned Gifts

Welcome Gift Planner

WebManager Logout

Main GiftLegacy CresPrint CresPro CresSurvey CresPlus GiftCollege GiftChar

Website

Analytics

Donors

E-newsletter

Literature

Wills Planner

Website

Blocked IPs

E-newsletters

How-To Manuals

Literature

Market Campaigns

My Plan

Provide & Protect











Social Media

Wills Planner

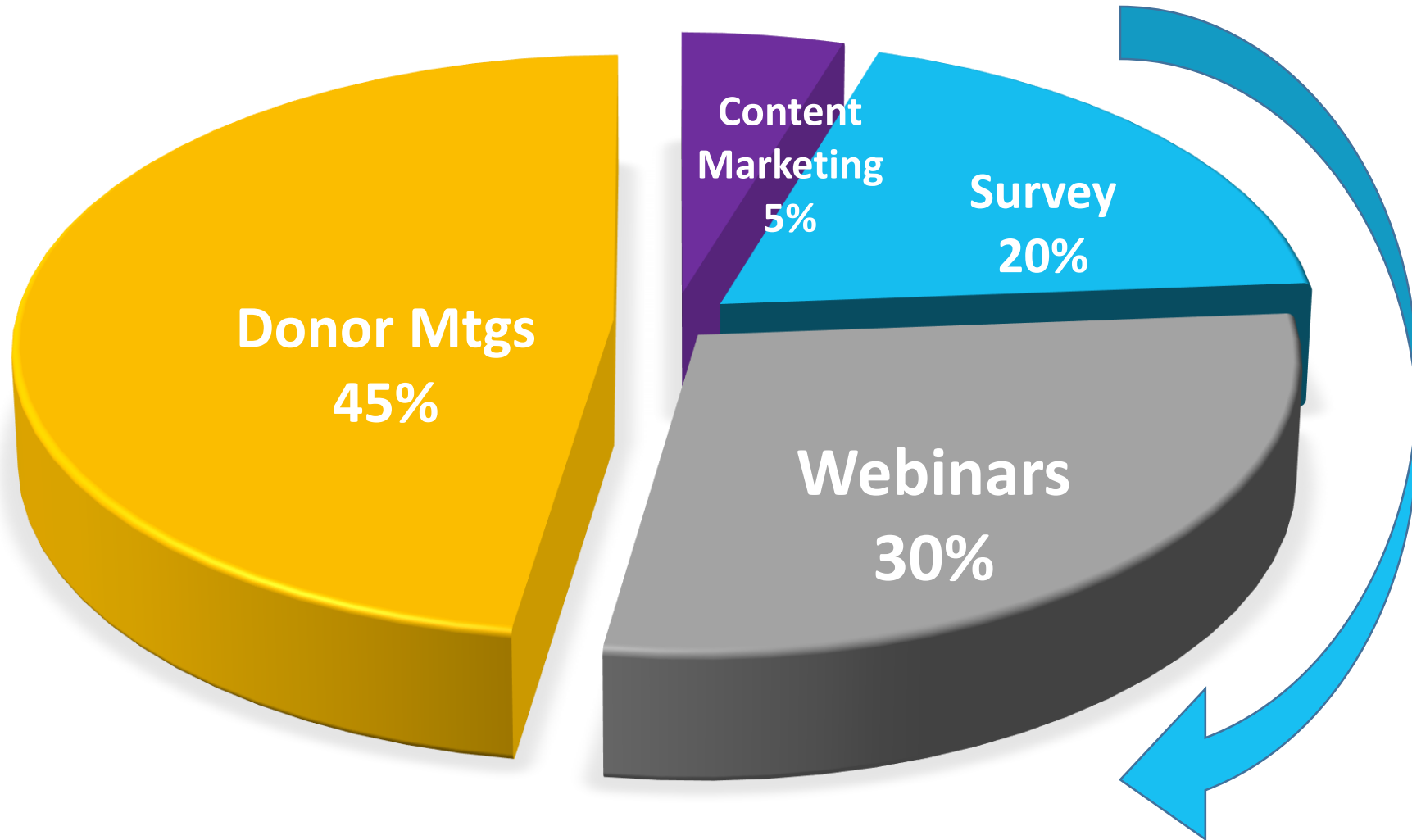
Top Prospective Donors

This report will give you a list of your top prospective donors based on their website activity. A suggested gift plan is also displayed based on their activity. For more information on your prospective donor, click on the donor name or email link.

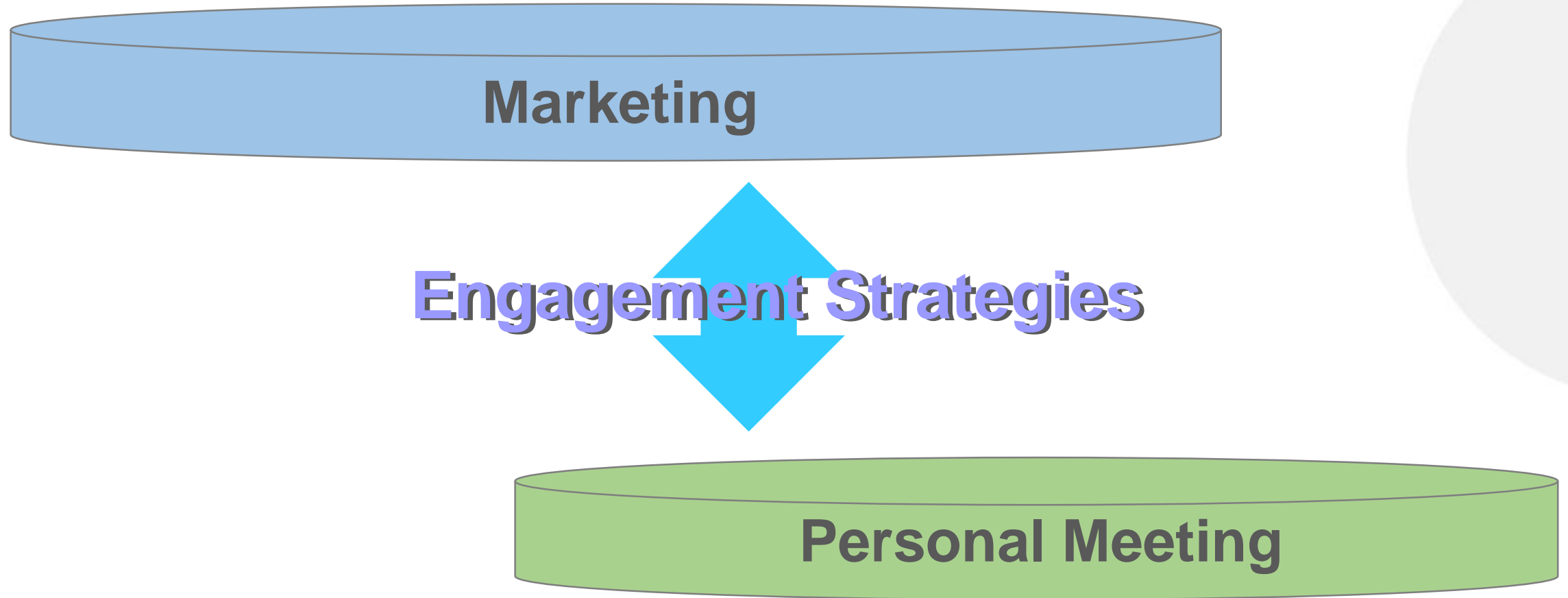
From: 01/09/2009 To: 11/18/2020 Gift Model: ALL

Donor Activity				Downloads:  Chart CSV	
Score	Name	Last Page Visited	Visit Date	Gift Model	
100.0	Donor 1	eNewsletter Preferences	10/05/2010	Will/Bequest	 Contact
100.0	Donor 2	Planned Giving Home	10/11/2010	Unitrust	 Contact
100.0	Donor 3	Today's News - Finance News	03/09/2015	Gift Annuity	 Contact
92.00	Donor 4	Today's News - Savvy Living	02/26/2011	Will/Bequest	 Contact
89.00	Donor 5	GiftLegacy Donor Manager - Logout	06/09/2015	Will/Bequest	 Contact
89.00	Donor 6	Planned Giving Home	02/06/2015	IRA	 Contact
82.00	Donor 7	Planned Giving Home	09/20/2010	Will/Bequest	 Contact
80.00	Donor 8	Privacy Statement	08/27/2010	Gift Annuity	 Contact
79.00	Donor 9	GiftLegacy Login Page	01/25/2012	Will/Bequest	 Contact
75.00	Donor 10	Today's News - Savvy Living	08/27/2010	Unitrust	 Contact
75.00	Donor 11	Your Plan Download	09/22/2010	Will/Bequest	 Contact

Increasing Donor Interest



Bridging the GAP



Engagement Marketing

Engaging Warm Audience

Analytics

Activity Summary
Individual Send Reports
Top Prospects



Calls to Action

Survey

Open Two-way
Communication
Learn Donor Interest
Platform for Engagement



CresSurvey

CALM Survey Results

- Survey window: Jan 27-Feb 15, 2022
- 1,985 surveys sent
- 24.2% open rate, 451 users opened the email
- **174 surveys completed**
- **20 indicated they had left CALM in their estate plans (9 previously unknown)**
- 80% prefer email communications
- 62% noted that emails, stories and social media posts helped them stay connected
- 35 requested more information



Personal Meeting



Marketing (Content + Engagement)

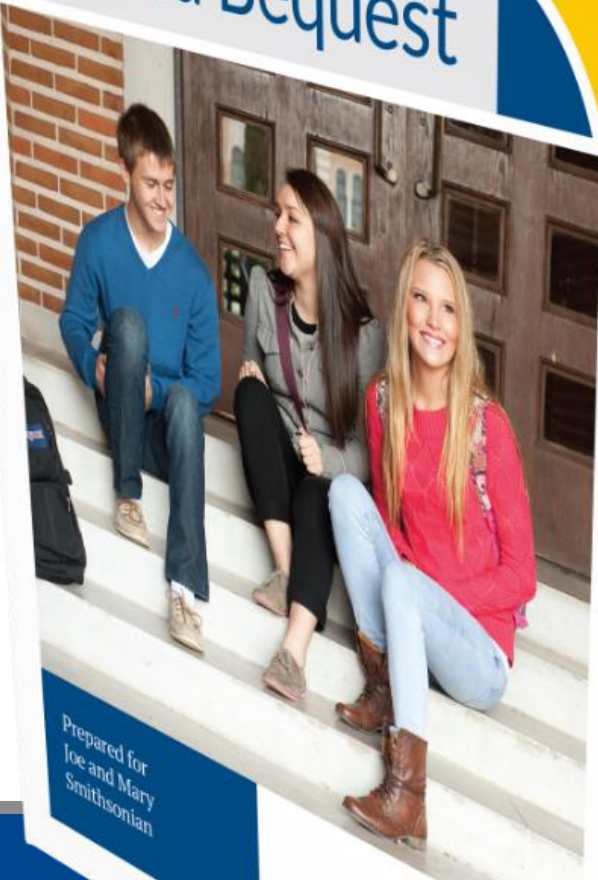
Personal Meeting

Donor CPR

Cultivating
Planting
Reaping

Crucial Conversations

Gift and Bequest



Prepared for
Joe and Mary
Smithsonian

Take Your Giving Go Further



A giving strategy that may appeal to you is a current gift and a charitable bequest made in your will or trust. A "gift and bequest" can help you achieve your goals. You can provide for your family and support the causes that matter to you today, while leaving a lasting legacy for tomorrow.

Fulfill Your Charitable Goals Now

PLAN TODAY

Joe and Mary Smithsonian, Age 35 and Age 32

Cash

\$1,000,000

Your transfer of the \$1,000,000 gift to us is a wonderful help for our charitable efforts. We greatly appreciate the commitment of you and our other loyal donor friends. Many of our friends have desired to make a charitable impact with a gift and...

Create a Lasting Legacy

You can make your giving go further and create a lasting legacy by adding a charitable bequest to your immediate gift. A bequest is one of the easiest ways to leave a gift to us as part of your estate plan. Your gift will help us achieve our vision for the future.

Make an Impact in the Future

PROVIDE FOR
TOMORROW

Joe and Mary Smithsonian, Age 35 and Age 32

Estate

\$1,000,000

Bequests
to Family

Charity

\$1,000,000

Estate bequests to family and charity.

The Magic Questions

Crucial Conversations

When and how did you make your first gift to this nonprofit?

What are your greatest charitable priorities now in the community? Why?

Why do you support our nonprofit?

What are our organization's greatest challenges over the next ten years?

Would you consider partnering with us to address those challenges?

Kathryn Miree: How to Become an Expert in the Conversation of Philanthropy

Journey with Your Donors

- Enewsletters/Eblasts
- Print
- Lead Magnets
- Analytics
- Engagement Surveys
- Webinars/Seminars
- Stewardship
- Key Partners Involved

Marketing

Content + Engagement

Personal Meeting

Donor CPR

- Do Your Homework
- Cultivation
- Discovery
- Assessment

Crucial Conversations

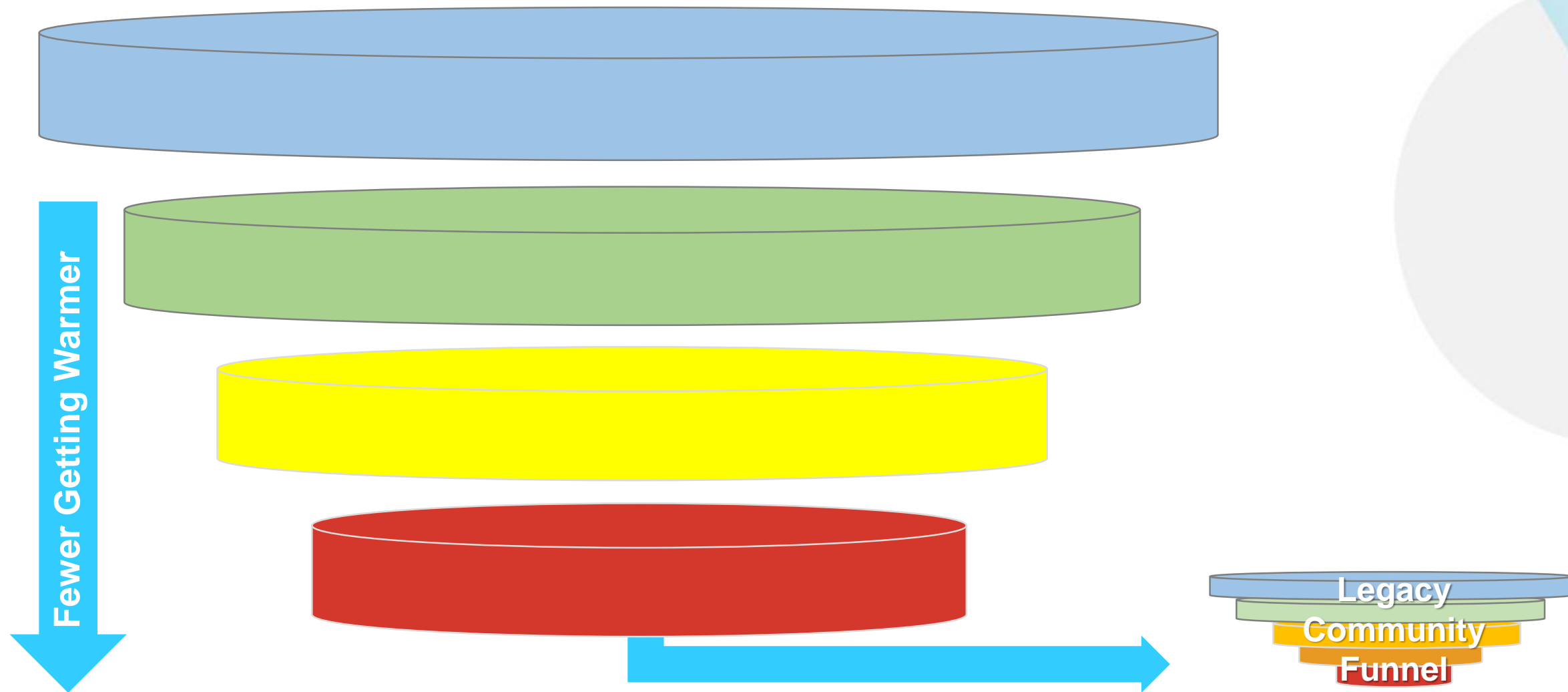
- Matchmaking
- Proposals/Advisor Involvement
- Asks/Overcoming Objections

Conversion

Fewer Getting Warmer



Q & A





Welcome



Jill Rode, CFRE

Music Academy of the West



Andy Ragone, CGPP

Crescendo Interactive

PRACTICAL PLANNED GIVING CONFERENCE SPEAKER EVALUATION

Date: _____ Speaker: _____

Name (optional): _____

Please rate the following:

	Excellent	Good	Neutral	Fair	Poor
I. OVERALL	5	4	3	2	1
Were your major objectives for this session met? Was the content of the session vital, timely, substantive?					
Comments: _____					

II. RELEVANCE	5	4	3	2	1
Was the subject matter directly related to the requirements of your job?					
Comments: _____					

III. VALUE	5	4	3	2	1
Do you believe the benefits of this session were worth the time, effort and cost?					
Comments: _____					

IV. SPEAKER	5	4	3	2	1
How was their presentation style? Did the session move along at the right pace? Did they have appropriate knowledge on the topic?					
Comments: _____					

V. MATERIALS	5	4	3	2	1
Were the materials clear and organized and appropriately helpful for the session?					
Comments: _____					

Vi. What did you like the most about the session?

VI. Any suggestions to improve future sessions?

XII. How many years of gift planning experience do you have? _____