Marketing Funnels
KLT &
Fully Devoted Fans
Welcome

Jill Rode, CFRE  
Music Academy of the West

Andy Ragone, CGPP  
Crescendo Interactive
Resources

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*

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*
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
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**

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<thead>
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<th>Action/Task</th>
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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
Two Marketing Funnels

Legacy Community Funnel

Prospect Marketing Funnel

IRA Rollover

CGA

DAF

CLTs

CRTs
Journey with Your Donors

Marketing
- Content + Engagement

Personal Meeting
- Donor CPR

Crucial Conversations
- Fewer Getting Warmer

Conversion

Legacy
- Community
- Funnel

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

• Do Your Homework
• Cultivation
• Discovery
• Assessment

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

Integrated Marketing for Planned Gifts
Increasing Donor Interest

- Donor Mtgs: 45%
- Webinars: 30%
- Survey: 20%
- Content Marketing: 5%
Content Marketing

Outreach

First: E-Newsletters (Monthly)
Second: E-Blasts (Quarterly/Gift Vehicle)
Third: Print (Budget Permitting – sync with Eblasts)
Optional: Social Media*

Websites

Educational Due Diligence
Gift Fulfillment**

Calls to Action

*Depending on what strategies are currently in place
**DAF, Gifts of Stock, Beneficiary Designation Gifts, QCDs
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
MAW Legacy Enewsletter List - Overview

From: 08 / 01 / 2022 - To: 01 / 01 / 2023

Graph: Overview

Downloads: Graph Image Chart CSV

MAW Legacy Enewsletter List

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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
Measure Donor Interest

Identify Top Prospects

**Websites**
- Educational Due Diligence
- Gift Fulfillment*

**Analytics**
- Activity Summary
- Email Send Reports
- Top Interested Prospects

**Calls to Action**

*DAF, Gifts of Stock, Beneficiary Designation Gifts, QCDs
Top Prospects – 60-80%
Increasing Donor Interest

- Donor Mtgs: 45%
- Webinars: 30%
- Survey: 20%
- Content Marketing: 5%
Bridging the GAP

Marketing

Engagement Strategies

Personal Meeting
Engagement Marketing

Engaging Warm Audience

Analytics
Activity Summary
Individual Send Reports
Top Prospects

Survey
Open Two-way Communication
Learn Donor Interest
Platform for Engagement

Calls to Action
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

Cultivating

Donor CPR

Planting

Marketing (Content + Engagement)

Reaping
The Magic Questions

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?
Journey with Your Donors

Marketing

Personal Meeting

Crucial Conversations

Conversion

- Enewsletters/Eblasts
- Print
- Lead Magnets
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Fewer Getting Warmer

Content + Engagement

Donor CPR

Legacy Community Funnel

Integrated Marketing for Planned Gifts
Q & A

Fewer Getting Warmer

Legacy
Community
Funnel
Welcome

Jill Rode, CFRE
Music Academy of the West

Andy Ragone, CGPP
Crescendo Interactive
Date: ___________________    Speaker: ________________________________________

Name (optional): ____________________________________________________________

Please rate the following:

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<td>Were your major objectives for this session met? Was the content of the session vital, timely, substantive?</td>
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| 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? | _____ |