

# 12

simple yet **powerful**  
tips to drive traffic

*to your*

**planned giving**  
website,

*your* phone, and  
*your* inbox!

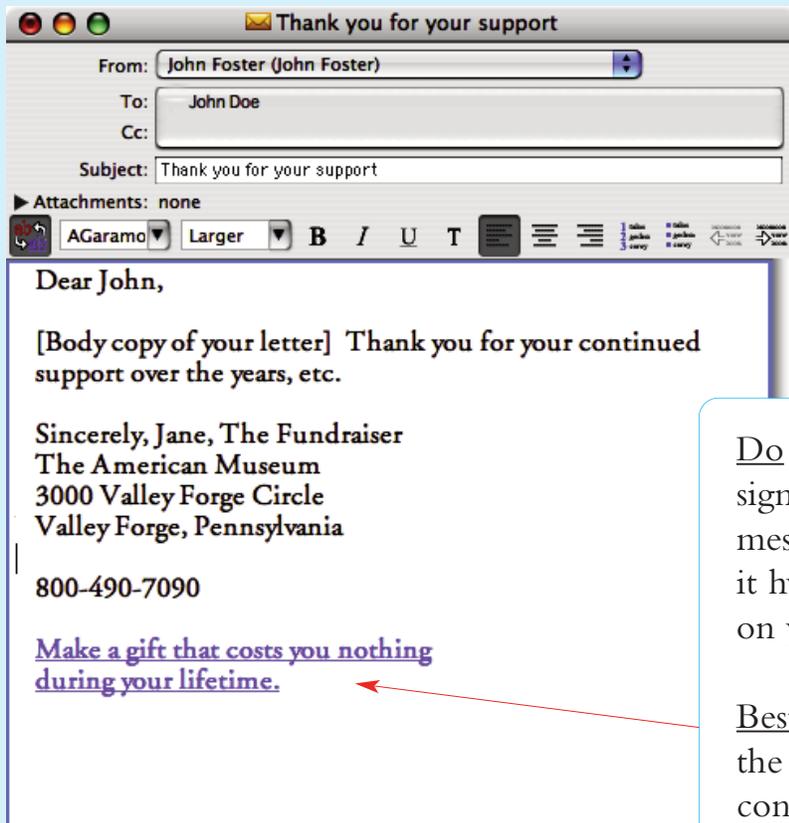
*Developed exclusively for VirtualGiving clients.*

by Viken Mikaelian & John Foster

  
virtualgiving.com

## TIP 1

Simple, powerful, yet overlooked: turn your daily email correspondence into a powerful tool.



Do not forget to use your signature line to get your message across. Better yet, have it hyperlink to the right page on your website.

Best, change it depending on the age group you are contacting. Use compelling statements about the features of a gift plan,\* like the one on the left. (This one links to Wills and Bequests.)

\* For a set of 7 compelling attention-grabbers that are yours to use for free, visit:

[virtualgiving.com/oneliner](http://virtualgiving.com/oneliner)

## TIP 2

Advertise creatively with FlashCards. These cards get read – planned giving newsletters don't. A client of ours, for example, mails teasers like:

**Did you know there's a charitable way to lock in the gains on your securities and receive above-market fixed income? Visit our website to find out how.**

Notice the card raises an important question but withholds the answer, instead motivating the reader to visit the website.

Below are visuals from a series of cards sent out by two of our clients:

Can you guess what gift plan this refers to on the back of the card?\*

"I can't make a gift to Goodwill – I'm saving for retirement."



The Lewis Society  
The Children's Hospital Foundation  
Office of Planned Giving  
34th & Civic Center Blvd.  
Philadelphia, PA 19104-4399



**You don't have to be wealthy to make a significant gift to Children's Hospital.**

The Children's Hospital of Philadelphia®  
A pediatric healthcare network

Non-Profit Organization  
U.S. Postage  
PAID  
Philadelphia, PA  
Permit No. 04525

ADDRESS SERVICE REQUESTED

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For more information, please contact:

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**You can make a gift to Children's Hospital and receive guaranteed income for life.**

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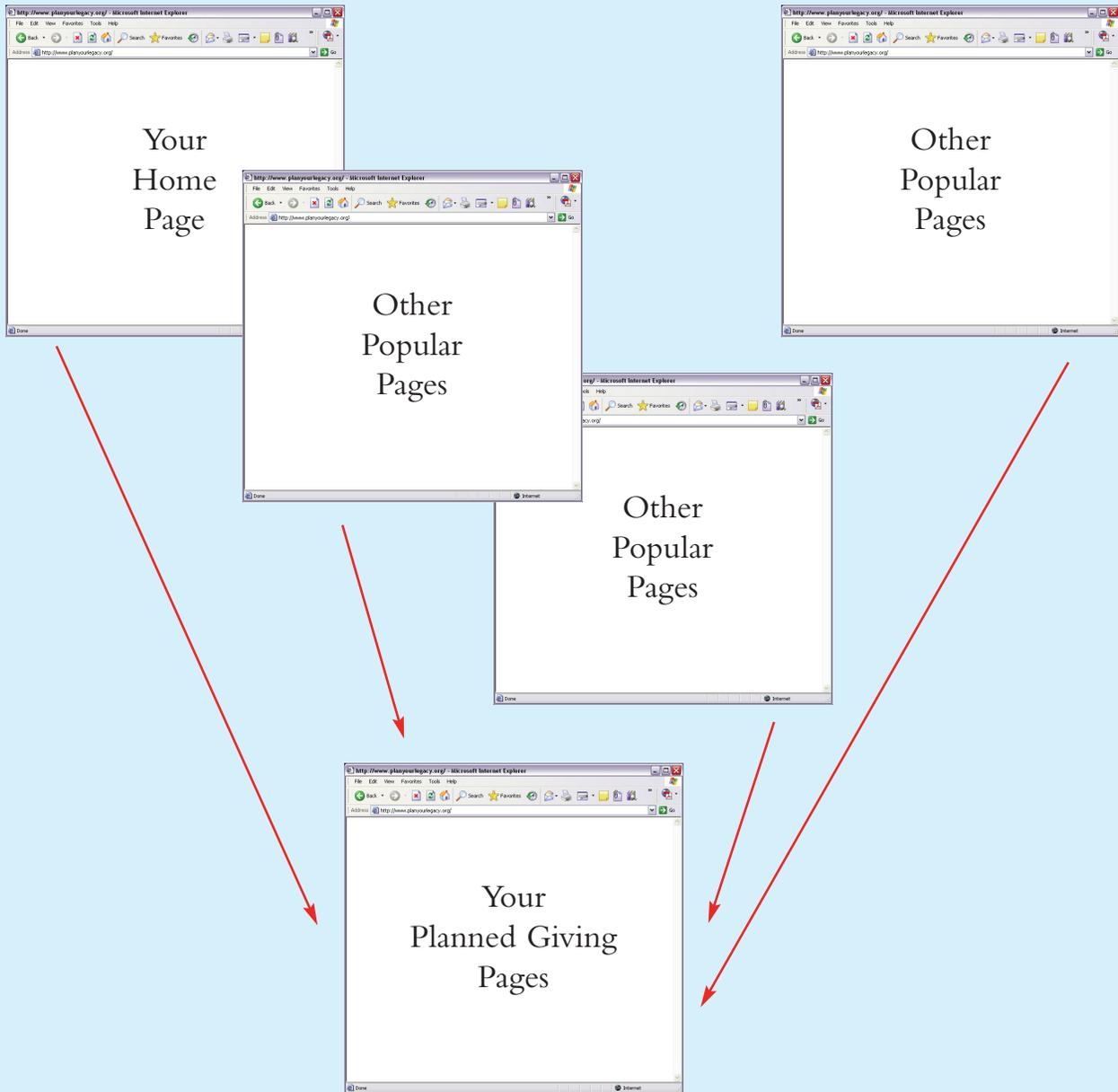
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\* Deferred Gift Annuity.

### TIP 3

It's done routinely in the for-profit world.

This is common sense, yet very few people implement it. The more links to your planned giving website from various pages on your organization's main website — the better. A link from your organization's home page is ideal.



## TIP 4

Experiment with different wording for your links and headlines.

For example, replace the words “planned giving” with a more informative and compelling alternative like "creative ways of giving."

Other examples of intriguing link phrases include:

- You don't have to be wealthy to make a significant gift.
- You can make a gift that does not affect your cashflow during your lifetime.
- Support our mission and receive guaranteed income for life.

Again, for a set of 7 compelling traffic-builders that are yours to use for free, visit:

[virtualgiving.com/oneliners](http://virtualgiving.com/oneliners)

## TIP 5

### Get creative!

Place display ads featuring your URL in publications such as newsletters, alumni magazines, church bulletins, theater programs, etc.

Include a donor testimonial when possible.

Here are two display ads that impressed us (Smithsonian Institution's National Air and Space Museum). Notice how they lure “any reader” to notice the ads, without mentioning the words “giving” in the headline.

*Author's Note* (Viken Mikaelian): I can “smell” a fundraising ad 82 miles away. I was lured into reading these ads not knowing what they were about. That is what makes them successful.

*“What can a retired pilot do?”*



**Captain George William Elliott's romance with aviation spanned more than four wonderful decades. He began his career as a flight instructor in the cockpit of a Curtiss P-40. He trained to fly the Northrop P-61C Black Widow, and he retired as a United Airlines captain.**

**“I had to find a way to stay involved,” says Captain Elliott. He and his wife, Virginia, discovered they could arrange a charitable gift annuity to benefit the National Air and Space Museum. “Our gift brought us such joy,” adds Virginia Elliott. “George wanted to share his passion for aviation with others.” They were so delighted that a year later the Elliots completed a second annuity.**

**To learn how a charitable gift annuity benefits you and the Museum, call 202-357-2493, or fill out and return the coupon below. You may also send an e-mail to [gayle.union@nasm.si.edu](mailto:gayle.union@nasm.si.edu). All inquiries are confidential.**

**Involve**

**Please Give to the Smithsonian's National Air and Space Museum**

**YES!** Please send me information about a Charitable Gift Annuity for the National Air and Space Museum.

I have already included the National Air and Space Museum in my estate plans.

**Smithsonian National Air and Space Museum**

**All replies are confidential. Mail to:** Gayle S. Union, National Air and Space Museum, Suite 3743, Independence Avenue at Sixth Street, SW, Washington, DC 20560-0321. **Phone:** 202-357-2493. **E-mail:** [gayle.union@nasm.si.edu](mailto:gayle.union@nasm.si.edu)

*“Patty, girls don't become pilots!”*



**Oh, yes they do. And Patty Wagstaff became the best — among men and women. Today, she's a champion aerobatic pilot, air show star, aerobatic coach and trainer, writer and lecturer.**

**She's also a member of the Smithsonian Legacy Society, as one of many benefactors who has included the National Air and Space Museum in their will.**

**Find out how you can include the National Air and Space Museum in your estate plans. Fill out and return the reply form below, or call 202-357-2493. You may also e-mail [gayle.union@nasm.si.edu](mailto:gayle.union@nasm.si.edu). Help us reach our fullest potential!**

**“The Museum promises so much potential, to inspire kids, stretch imaginations, and preserve the amazing history of flight. My bequest will help keep the promise. You can help, too.”**

**Potential**

**Please Give to the Smithsonian's National Air and Space Museum**

**YES!** Please send me information on how to include the National Air and Space Museum in my will or living trust.

I have already included the National Air and Space Museum in my estate plans.

**Smithsonian National Air and Space Museum**

**All replies are confidential. Mail to:** Gayle S. Union, National Air and Space Museum, Suite 3743, Independence Avenue at Sixth Street, SW, Washington, DC 20560-0321. **Phone:** 202-357-2493. **E-mail:** [gayle.union@nasm.si.edu](mailto:gayle.union@nasm.si.edu)

## TIP 6

Complement print ads with editorial copy such as feature articles describing your new Internet resources. Emphasize the benefits!

Don't forget to announce your website when it is about to go live on the Internet. Again, emphasize the benefits. Do this with a personalized letter in a #10 envelope (no labels, no other enclosures). Also, send this announcement twice a year. Yes, twice. Chances are only 28% of your original mailing got read anyway, and 95% of those who read it have forgotten about it. Reptition is important... there is something called the "stickiness factor" in marketing.

Need sample copy you can use immediately? Download it below\*. Edit and personalize to suit your organization:

[virtualgiving.com/announce](http://virtualgiving.com/announce)

\*This is a great way to kick-start Tip #10.

## TIP 7

Mention your site at planned giving seminars and meetings.

These events offer you an opportunity to give attendees hands-on tours and demos of your website. Also, give your planned giving advisory group a demo of the site and its features. You will be surprised at how excited board members get.

### **A bonus:**

Take advantage of our presentation ([virtualgiving.com/answers](http://virtualgiving.com/answers)) and present it to your board or volunteers. They will be impressed and motivated by its clear, powerful explanation of the whys and hows of better planned giving communication with your organization's prospects.

Request the presentation in a Power Point format below, and customize it as you wish.\*

[virtualgiving.com/presentation](http://virtualgiving.com/presentation)

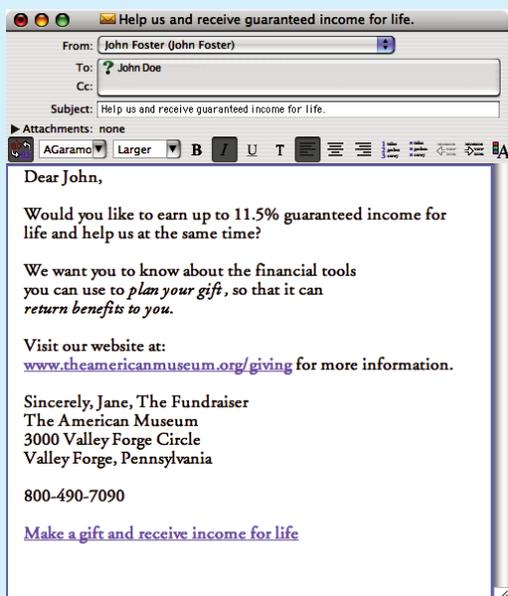
\* Many professionals also use this presentation in their seminars.

## TIP 8

Don't limit yourself to marketing by regular mail alone.

Collect email addresses of site-visitors (with their permission) and communicate via the Internet. Send out direct email blasts no more than four times a year.

Here's how we recommend using email marketing:



- Send just 4 emails per year – no more than 6, tops
- Let your mission drive your message
- Make sure the subject line is compelling
- Keep the copy short (no more than 10 lines)
- Personalize each email
- Stay away from graphical headers and footers to fancy-up your email. They break in email clients such as Outlook. Just focus on delivering your message.
- And most importantly, do not use a “bulk mailer” – use mail-merge. Many fundraisers and even vendors simply just don't get this!

Violate these guidelines at your own peril – you risk alienated and irritated prospects otherwise. To learn the crucial differences between engaging and overwhelming your email recipients, visit the link below and click on Targeted Email.

[virtualgiving.com/services](http://virtualgiving.com/services)

You may also wish to read *Overkill Marketing* (originally published in the *Journal of Gift Planning*). It even covers which months are best to mail.

[virtualgiving.com/overkill](http://virtualgiving.com/overkill)

## TIP 9

*This may sound silly ... but we have clients who do it:*

Tell callers about your website as part of your voicemail recording.



"Hi! This is Richard. To skip this recording and leave a message now press #.

"While I am unable to take your call now, please take a look at our informative planned giving website, it will likely answer any questions you may have!

The web address is ..."

## TIP 10

Advertise your site at reunions and social gatherings, in publications, and on FlashCards★.

Display your URL and your website every place you list your name and phone number ...in newsletters, on business cards ...everywhere. Better yet, display a screen shot of your website in publications and FlashCards announcing your website.

Again, don't forget your URL, your phone number, and email address. Why all three? Because every individual has their own preference on how to contact you.

Albright COLLEGE

Have Your Stocks Gone Up This Year? Or Down?

(Either way, using them to make a gift to Albright makes financial sense.)

When you review your portfolio at year-end, look for stocks that have grown in value. If you use them to make your gift to us instead of cash, the resulting deduction will equal the stocks' full fair market value, and you'll face no liability for capital gains. Our advice to donors is to buy low and give high!

You can freeze the value of stocks you fear may decline in the new year by contributing them for an Albright charitable gift annuity. Your annuity will be based on the value of the securities at the time you donate them. And, you'll gain the security of stable, lifetime payments in return for your gift. If you hold stock that declined in value this year, we suggest a two-step process to ease your discomfort... First, sell the stock and claim the resulting tax loss, then donate the proceeds to Albright for an additional tax deduction.


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### How? It's called a "Charitable Gift Annuity." Here are some of the benefits:

- ★ Guaranteed annuity payments for life
- ★ An income tax deduction now
- ★ Excellent rates
- ★ Tax-advantaged income (part ordinary, part capital gains and part tax-free)
- ★ Capital gains tax savings on any appreciated property you donate
- ★ The remaining principal goes to the Hospital when the contract ends

Sample Rate Chart for a \$10,000 Gift Annuity on a Single Life

Annuitant Age at Gift	Age 65	Age 70	Age 75	Age 80	Age 85
Annuity rate	6.0%	6.5%	7.1%	8.0%	9.5%
Charitable deduction*	\$3,553	\$3,952	\$4,433	\$4,905	\$5,256
Annual payment	\$600	\$650	\$710	\$800	\$950

\*Deduction will vary slightly with changes in the IRS Discount Rate.

WARNING: These examples are for illustrative purposes only and are not intended as legal or tax advice. Consult your own legal and tax advisors prior to making any material decisions based on this data.

 The Children's Hospital of Philadelphia®  
A pediatric healthcare network

The Lewis Society

**Discover the Benefits of Giving Wisely ...**

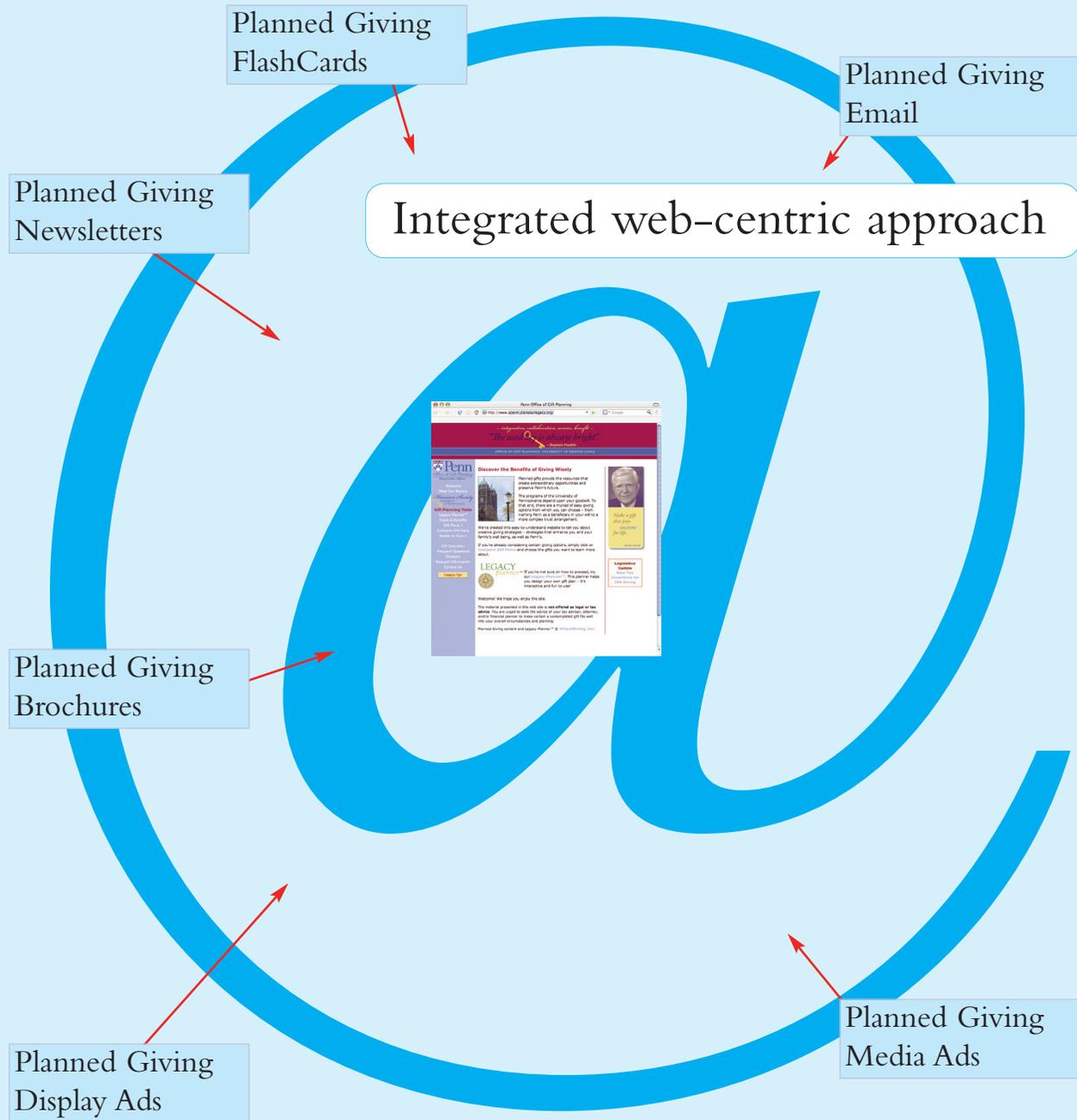
For more information, call the Office of Planned Giving at 267.426.5623, email us at [plannedgiving@email.chop.edu](mailto:plannedgiving@email.chop.edu), or visit us online at:

[www.chop.edu/plannedgiving](http://www.chop.edu/plannedgiving)

★ We can help. Call us at (800) 490-7090 to find out more.

## TIP 11

Be web-centric. Let your planned giving website do most of the work. Send out Flash Cards, newsletters, brochures and emails that drive prospects to your website, and to your phone.



## TIP 12

Insist on an easy-to-remember URL.

Your planned giving website should be easy for your prospects to access, and remember.

### **Good:**

<http://www.yourlegacy.org>

<http://www.name.org/plannedgiving>

<http://www.name.org/giftplanning>

<http://www.name.org/legacyplanning>

### **Bad:**

<http://www.wcc.jj/dev/giving/.jsp/WebID/CDA/0.0056/planned.htm>

FYI, we work with your IT department to simplify your URL. If you do not have an IT, we do it ourselves.

## We're very nice people.

So call us! We'll be happy to help you in any way we can.

610-933-6737

610-672-9684 [fax]

VirtualGiving, Inc.  
1288 Valley Forge Road  
Building 82  
Valley Forge, PA 19460



*If you're ever in Philadelphia, make sure to visit historic and beautiful Valley Forge Park.*

*When you do, stop by for coffee – we're only 1/4 mile down the road.*

Recent client list:

[virtualgiving.com/ourclients](http://virtualgiving.com/ourclients)