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GIFTS IN WILLS - DATA AND TECHNOLOGY MATTER

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Introduction

Stephen Mally FFIA CFRE

- ✓ Professional experience
- ✓ FIA engagement
- ✓ FundraisingForce
- ✓ @FraisingForce 
 - #includeacharity



What We Will Cover



Our agenda today, includes:

- ✓ Why technology matters?
- ✓ Why data matters?
- ✓ Mistakes Australian charities make.
- ✓ Top action items.
- ✓ Planning for a typical bequest marketing effort.
- ✓ What to track.
- ✓ Results of tracking.
- ✓ Final thought.

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WHY TECHNOLOGY MATTERS?

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Why Technology Matters

Technology.

- ✓ Your CRM is your organisation's #1 investment.
- ✓ Coordinate efforts across organisation.
- ✓ Save time and resources.
- ✓ Drive effectiveness and engagement.
- ✓ Increase focus/make decisions.



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WHY DATA MATTERS?

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Why Data Matters

Data.

- ✓ Your data is your organisation's #1 asset.
- ✓ Allows you to segment existing donors.
- ✓ Investigate prospective donors.
- ✓ Interpret history.
- ✓ Test messaging.
- ✓ Benchmark against other NFPs.



Why Data Matters

Data.

- ✓ Create a data-led culture.
- ✓ Make decision based on data, not based on a gut feel.



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MISTAKES AUSTRALIAN CHARITIES MAKE

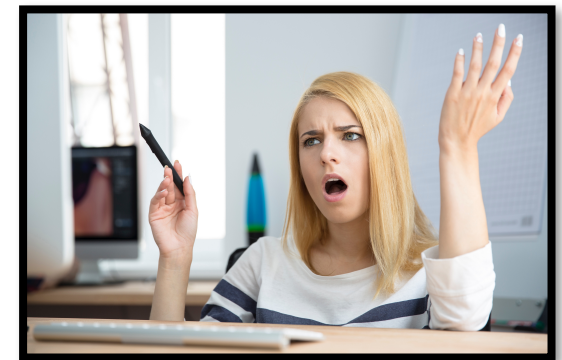
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Mistakes Australian Charities Make

Top technology mistakes.

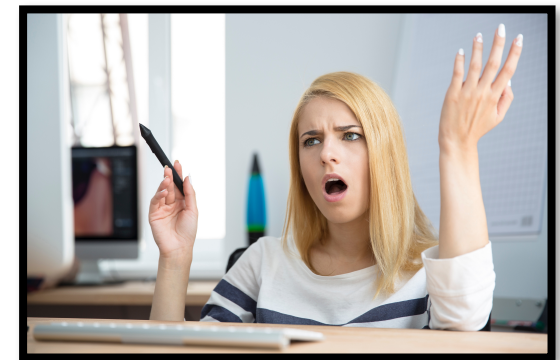
- ✓ Lack of investment in a top-rated CRM.
- ✓ Acquiring a CRM which does not match organisation's requirements.
- ✓ Acquiring a CRM which does not integrate with other tech solutions.
- ✓ Lack of overall respect for data.



Mistakes Australian Charities Make

Top technology mistakes.

- ✓ Allowing data to be tracked outside of CRM.
- ✓ Lack of training/ongoing training.
- ✓ Deficient security settings in CRM.
- ✓ Expecting the CRM to “drive” itself.



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IN SUM – TOP ACTION ITEMS

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Top Action Items

Things you can action now.

- ✓ Search for a CRM which will work for you.
- ✓ Configure the CRM to...work for you.
- ✓ Manage the CRM appropriately.
- ✓ Invest in the CRM - ongoing.
- ✓ Track meaningful data.



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PLANNING FOR A TYPICAL BQ MARKETING EFFORT

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Planning for Typical BQ Marketing Effort

Who to involve in planning.

- ✓ Leadership.
- ✓ Major Gifts team.
- ✓ Supporter Services/data entry team.
- ✓ Anyone who answers the phone.
- ✓ Everyone who will be impacted.



Planning for Typical BQ Marketing Effort

What to plan.

- ✓ Find a “home” for all data to be collected.
- ✓ Only collect meaningful data which you will use in the future.
- ✓ Collect data which can be used in segmentation.
- ✓ Collect data which can be measured.



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WHAT TO TRACK

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What to Track

Measure.

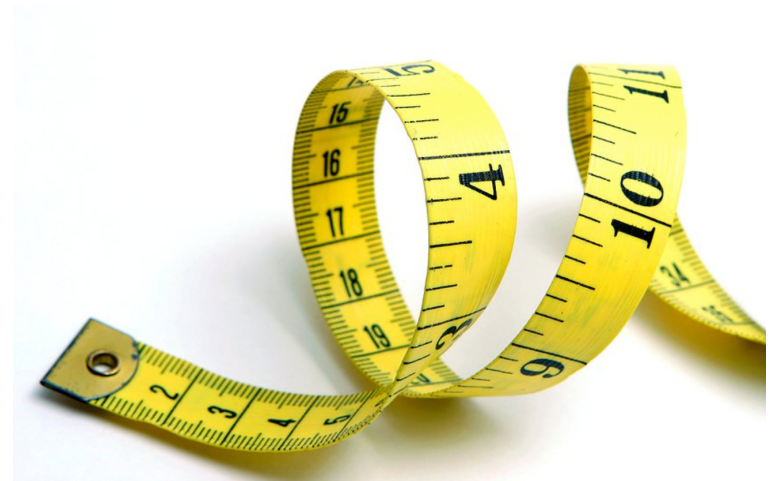
- ✓ The obvious:
 - BQ Interested.
 - BQ Intender.
 - BQ Confirmed.
- ✓ Age.
- ✓ Gender.
- ✓ Presence of children/grandkids.
- ✓ Survey responses.



What to Track

Track.

- ✓ Any meaningful contact.
 - Phone calls.
 - Emails.
 - SMS.
 - Visits.
- ✓ All global communication.
- ✓ Your "moves".



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RESULTS OF TRACKING

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Results of Tracking

Measure.

- ✓ Create a bequests score across your data set.
 - Biographical detail.
 - Engagement activities.
- ✓ Use bequests score in segmentation, marketing.

RESULTS



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FINAL THOUGHT

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Final Thought

Not reinventing the wheel.

- ✓ Don't put these things in the “too hard” basket.
- ✓ This stuff is easy.
 - Invest.
 - Track.
 - Measure.
 - Don't give up.



Thank you!

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Join the conversation



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