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Published in early 2012, *The Cultivation Funnel: How Content Marketing Can Help You Move Planned Giving Prospects from Awareness to Close* is intended to encourage you to add a new element to your marketing mix of technique, timing, and audience – **content marketing**. Content marketing begins with growing awareness of planned gift opportunities at your organization and its mission, and ends with closing planned gifts. When executed well, the process we outline in the paper can help you do just that, and contribute to more successful planned giving outcomes.

If you’ve ever been responsible for developing a marketing plan, you know full well how much advanced planning the process requires. There are fundamental issues that need to be addressed – whom you’ll reach out to and when you’ll initiate the contact, for example. There are also the issues of what action you want your targets to take and what results you’ll forecast. And even if you’ve done all this and can comfortably articulate the “who,” the “when,” and the “why,” the “where” and the “what” may still be missing pieces of the puzzle.

Filling in those blanks is a primary benefit of a process called “Content Marketing” – adopting a strategy of providing content based on prospects’ positions in the planned gift awareness-to-close cycle.

The fundamental requirements of the strategy are to:

- identify content that is engaging to potential donors at various stages of interest in supporting your organization with a planned gift
- use a variety of techniques available to you to disseminate appropriate content to individuals at each of those stages

Your website, for instance, has the capability to be a hub of information for a wide range of individuals – from those who have recently become aware of your organization through advertising or search results, to those who have already made a planned gift and might consider a second, and everyone in between.

In the paper, we consider each of the stages (Awareness, Permission, Nurturing, Education, and Close) through the lens of content rather than technique. In this excerpt, we present the section on “Permission.”

Permission

Permission marketing (made popular by marketing guru Seth Godin) focuses on gaining the permission of a prospect to communicate with him or her about a particular topic. The aim here is to encourage individuals to “raise their hands” – that is, to demonstrate their interest in your organization by requesting more information, thereby inviting you to communicate with them more frequently.

Since the particular topic you’d like to communicate with them about is planned giving, there are a number of things to consider and organizational choices you’ll need to make to define what permission means to you and your planned giving colleagues. Some common questions you may address include:

- If a couple has contributed to your organization’s annual fund for five consecutive years, does that mean you have permission to communicate with them about a planned gift?
- Does that scenario change if an individual has contributed to your organization’s annual fund for 10 years? 15 years?
- How about individuals who have attended a seminar on estate planning hosted by your organization?
- If an individual subscribes to your blog, does that mean he or she has given you permission to communicate with him or her about planned gifts via direct mail?
- If individuals are members of your Board of Directors or Trustees, are they fair game to approach with information about planned gifts?
- If an existing planned gift donor gives you the name of someone who may be interested in making a planned gift, does that mean you have permission to reach out to that person regarding a gift?

Obviously, these are only a few of the many scenarios you’ll come across. When in doubt, ask yourself: would the recipient miss receiving your communications if you were to stop sending them?

Fortunately, there are some tools and tactics that can stimulate permission granting.

Print communications

- Include a response mechanism – a box to check and return, for instance – that provides access to information about planned giving
  - Ex.: “Send me more information about bequests”
  - Ex.: “I would like to learn more about providing a gift and receiving income for the rest of my life”
- Always provide your Web address and an incentive to visit
  - Ex.: “Learn more (about this gift) at www.xyz.org”

Electronic communications

- Provide opportunities to submit email/phone information in exchange for more details about other donors and gift types following stories about existing donors and testimonials
- Provide opportunities to sign up for planned gift messaging on a “Support Us” page
- Provide opportunities to enable broader permission on confirmation Web pages after any information submission, for instance, include a checkbox that says “Let me know about events in my area”

Miscellaneous tactics

- Work with Annual Fund staff to recognize planned giving potential in existing donors and start a dialogue with these donors that sets the expectation that they may be contacted regarding planned gifts (if they have no objections)
- Work with existing planned gift donors to identify planned giving potential in friends and family and start a dialogue with these individuals that sets the expectation they may be contacted regarding planned gifts (if they have no objections)
- Use voice mail greetings, email footers, email signature blocks, and thank-you messaging to announce that you solicit and accept planned gifts

Many techniques available to you can be employed to power this stage of your marketing. Some examples are below.

Your Organizational Website

Use forms that visitors can fill out to indicate they would like more information on a particular topic. Designing and maintaining a website with plenty of conversion opportunities (signing up for your newsletter, for example) is a good practice to enable permission marketing.

Remember, the journey of Awareness-to-Close is funnel-like. For example, an individual signs up on the Web to receive your newsletter, and in that newsletter they are exposed to gift planning content that may motivate them to move further down the funnel into the next stage.

Newsletters

Include content in your organizational newsletter that will attract readers to your planned giving Web pages. Examples include donor stories, gift types, benefits of various gift types, and investments your organization has been able to make with the support of planned gifts.

Complement this content by giving readers as many ways as possible to reach out to you, including the URL of a landing page specifically designed to collect their contact details in exchange for more information.

Development Staff Training

Work with annual fund staff to identify planned giving potential in existing donors and target those individuals to obtain permission to connect with them.

Encouraging other staff members to “tip you off” to a planned gift opportunity multiplies prospect contacts. Suggest staff listen for references to any of the following:

- Illiquid assets, such as real estate
- Multiple financial goals
- Ties to family or closely-held business
- Concerns about providing for heirs
- Assets producing no income
- Retirement planning
- Desire to make a major gift using assets other than cash
- Desire to make a major gift under a will or other estate plan
- Desire to simplify financial matters
- Concerns about time/energy devoted to managing assets

Social Media

Central to the process of securing and maintaining permission to communicate with individuals about planned gifts is the responsibility to continuously provide them content of interest. Social media is an ideal platform for this. Use it to share news about accomplishments, organizational changes, and new programs. If yours is a healthcare organization focused on addressing the needs of a specific disease, for example, be sure to share research regarding that disease with your followers – even if the information did not originate with your organization. Pass on the findings and the source. This information will keep your followers coming back for more, and therefore extend your permission. Our experience suggests that using social media to tell a captive audience about the needs of your organization and ways followers can help is best done sparingly. If all your followers see is solicitation content, they'll eventually discontinue the permission they previously granted to you by opting out.

Working with Professional Advisors

Through awareness activities, you may be able to engage with professional advisors and interest them more deeply in your organization and its goals. Once you accomplish this, you are likely to find there are times when individuals with interest in a specific charitable gift vehicle to accomplish estate or financial planning goals are referred to you by a professional advisor.

Making permission an element in your marketing program takes a lot of discipline. It's tempting to believe that extending your reach beyond those individuals who have given you permission to communicate with them will yield more planned gifts. But the truth is, making "the ask" too soon, before it is expected, or assuming a level of commitment to the organization that does not yet exist and hasn't been appropriately cultivated, can be a costly mistake.

The number of individuals in the funnel decreases the closer you get to the Closing Stage. Generally speaking, that's because many prospects who enter at the top of the funnel ultimately fail to meet the profile of a real donor. Sometimes, though, they can be frightened off by unwelcome and inappropriate content for their stage of interest. To stay on the short list of valued publishers and information providers, ensure that you are regularly providing content that is interesting, engaging, and relevant.

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