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The 5 Biggest Mistakes You Can Make With Your Planned Giving Website

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At PG Calc, we actively work with our clients to create planned giving websites built to serve their mission and the needs of their donors. Over the last 10 years, we have identified 5 critical – and frequently repeated – mistakes that hurt the performance of planned giving websites and make them fail to serve the needs of donors. We've listed those 5 mistakes below in the hopes that you can find some key takeaways to improve your planned giving program.

1 Mistake 1: Not Integrating Your Planned Giving Website Into a Broader Marketing Plan.

A website is a foundational piece in your marketing funnel. It can be a place to inform, to build awareness, and create interest in planned gifts. In other words, it contributes to many parts of your marketing funnel. A website allows you to:

- Educate potential donors, estate planners, and professional advisors on planned giving topics.
- Show how planned gifts impact your mission.
- Provide clear pathways for donors to reach out to your staff.

However, if you do not consider the purpose a website serves in your marketing funnel, it will not benefit your donors or produce meaningful results. Successful websites are designed to educate and build awareness. They provide relevant and meaningful content as donors consider what gift vehicle they may like to pursue. They present easy ways for donors to reach out to your staff to start a gift conversion.

Unsuccessful sites confuse the role that these structures play in the marketing funnel and distract donors with overwhelming or irrelevant content and/or poor website layout. This often leads to donors never reaching out to you to begin discussing their gift planning.

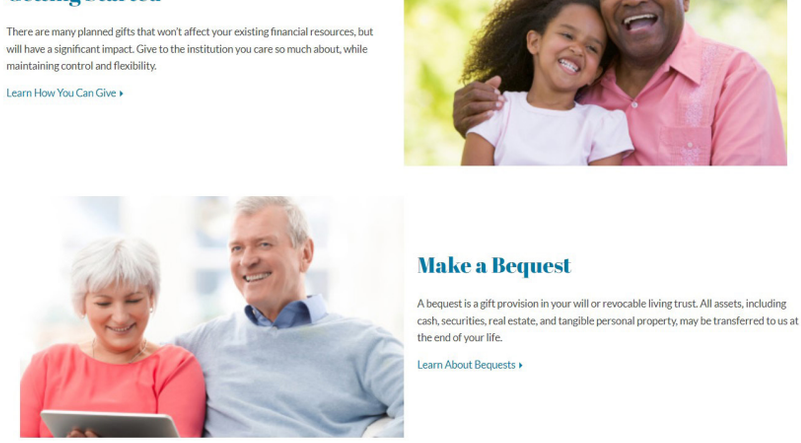
Make certain that the site is designed to achieve your program goals and objectives. And as goals and budgets change, so should the messaging of your site. When there is a disconnect between your goals and your site content, the site might be working against you.

2

Mistake 2: Overwhelming Your Donors With Choices.

There is an old direct mail saying that if you give your audience too many choices, they will pick none. This applies to all marketing and specifically to the front page of your planned giving website. It's important to serve your donors with relevant content – not a maze of links.

At PG Calc, we often like to pick 3-4 relevant topics for a website's front page and use these to create clear and obvious pathways for donors to follow. It's all based on the organizations goals. Here are some common options we see our clients pick:



- Legacy Society
- Bequests
- Charitable Gift Annuities
- Donor Stories

As outlined above, the website plays a key role in educating donors. By providing specific pathways, we can quickly get the donors to the content an organization wants them to see, and hopefully towards a conversation with our client's planned giving staff.

However, too many planned giving websites try to provide as much content as possible up front, rather than focusing on specific content. If you want a donor to learn about bequests, focus their attention on that content, and get all other options out of the way.

In addition to what the organization is pushing, the site can also focus on what you have learned a donor wants to see. That might be stock transfer information or bequest language. (More on this below.) If your site makes it easy for a donor to find what they are looking for, they are more likely to come back again.

3

Mistake 3: Not Giving Donors What They Want.

What are YOUR donors looking for? The answer is different for every charitable organization. Maybe they are looking for bequest language or information on gifts of life insurance.

The answers are in the numbers. You need to actively monitor and track behavior on your planned giving website via analytics to determine what content is most relevant for your specific donors. When you find a topic that is popular with donors, bring it to the home page and make it easy to find.

This process may never truly be complete; relevant topics can change, and donors may seek different information from year to year. Yet, if you don't pay attention to the needs of your donors, your site may be serving up information that is of no interest to your visitors and cause a reduction in page views and time spent on the site.

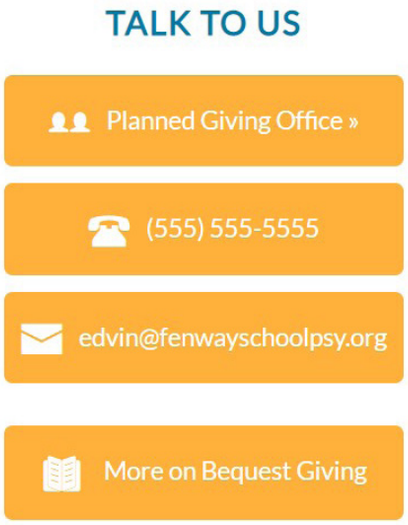
The key to success here is to be vigilant. Constantly look to focus on the most relevant and timely information, produce the most robust response from your audience, and encourage donor conversations.

4

Mistake 4: Making it Hard for Donors to Raise Their Hand.

On a planned giving website, since there is no monetary "ask," a conversation begins when a donor reaches out to start a conversation after educating themselves on the site. That could be a call, an email, or the completion of a web form.

Planned giving websites should encourage these discussions and facilitate clear ways for a donor to contact your staff. Don't make the donor search for your contact information. Make it easy to find, and use contact information that goes directly to the planned giving office and not general office lines.



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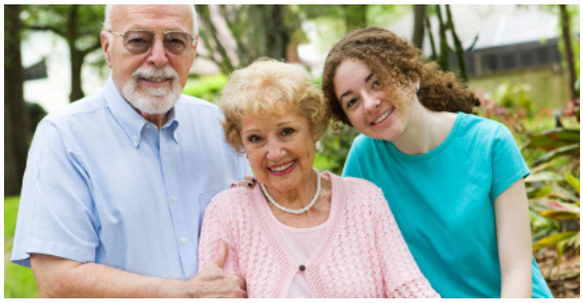
This could mean having the phone number and other contact details above the fold on every page. Your goal should be to provide clear and obvious direction to donors. The key to success is to make it as easy as possible for your donors to reach you.

5

Mistake 5: Failure to Show the Impact and Self-Satisfaction of Giving.

Your planned giving website and your marketing pieces pushing donors to the site should educate donors on the benefits of a planned gift, as well as the importance of the gift to the organization. Each gift, big or small, has an impact that will advance your mission.

If you are not discussing impact, then you are missing a major component of planned giving marketing. The decision to leave a bequest, for example, may be the perfect solution for the donor's current situation. However, there still may be someapprehension. This is where a good donor story can come to the rescue.



Stories, specifically stories about living bequest donors, help the potential donors see themselves in this giving. Stories of like-minded individuals making an impact on the organization into the future, and hearing them express the self-satisfaction of creating a legacy via a bequest is powerful. They are more powerful than any tax benefit or information on simplicity or revocability.

Personal, compelling narratives that connect donors to your organization's mission are more likely to establish creditability than any other marketing. In the end, the impact of giving and the power of a donor's own words and/or voice is the best marketing copy available for your website.

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- Planned giving website content.
- Donor engagement strategies.
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