

Planned Gift Prospects Don't ever want to meet you

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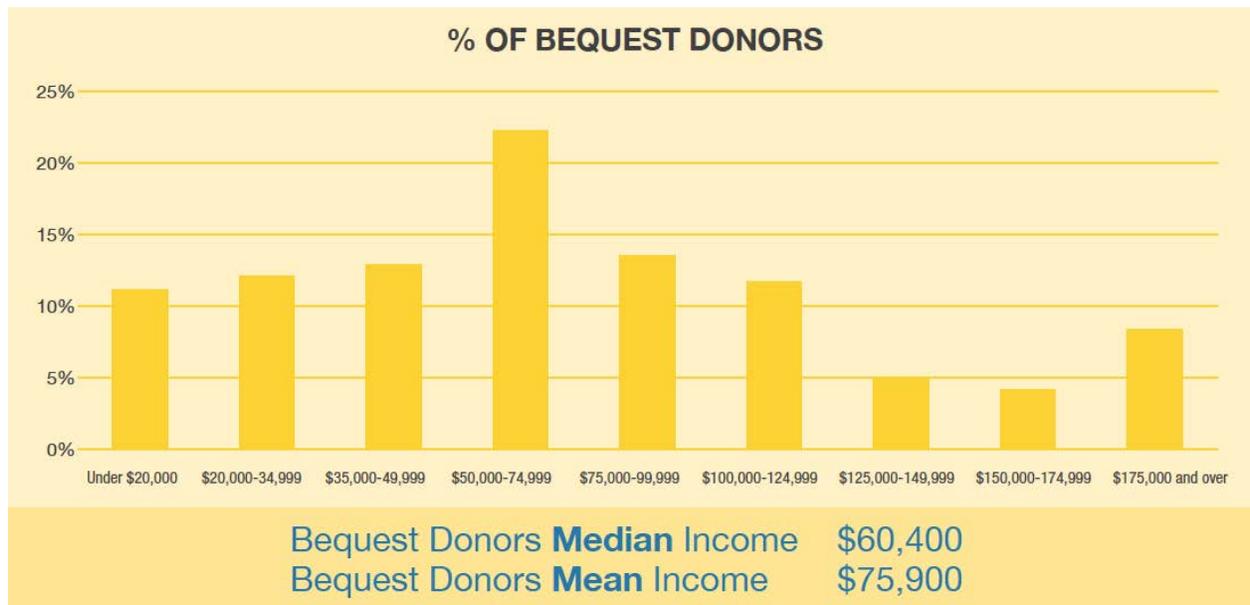


That's right. Most planned gift prospects actually don't ever want to meet you.

They'll even go so far as to tell you that they will never, ever make a legacy gift to your organization. But then, guess what? They do!

Why?

Because most are not rich.



Their major gift will occur after their lifetime.

They want to give more now but they can't. They need the money to survive. To many of these folks, meeting with you is scary. They don't have money to give now. They want to plan their gift on their own because they think they don't need your help.

Others might want to meet you but only once they have a certain comfort level. Only when they are ready. The trick is to help them get comfortable with the idea of meeting you and to help them see the benefits.

So, what are you doing to make them feel comfortable? How are you building trust and rapport with them? Are you using your communications effectively to warm them up?

And, how are you helping them see the benefits of meeting with you? Are you using your communications effectively to outline those benefits?

If not, you need a plan.

You need to engage them with highly personalized, relevant communications that provide valuable offers to build trust and outline benefits.

You need to "drip" these communications over time.

You need to track their responses to those communications and their digital body language over time using a platform that provides you with a feedback loop.

If you do that, they might meet you.

Then you'll be able to help them make their planned gift. You'll be able to facilitate the process in a way that benefits both your organization and them. And, they'll be much more likely to never remove your organization from their plan.