

# REACHING PLANNED GIVING PROSPECTS MISSED BY RESEARCH

Eighty Percent of Visitors to the Planned Giving Site are Unassigned, Have Never Been Assigned nor Qualified by a Gift Officer



# TODAY'S PRESENTERS

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**Kevin Bauman, MBA**  
**Director of Philanthropic Initiatives**



**Brian Sheridan**  
**Moderator for Today's Presentation**

# Challenge

Predicting  
Planned Gift  
Interest



**WHO?**  
**WHAT?**  
**WHEN?**  
**WHERE?**

# Opportunity

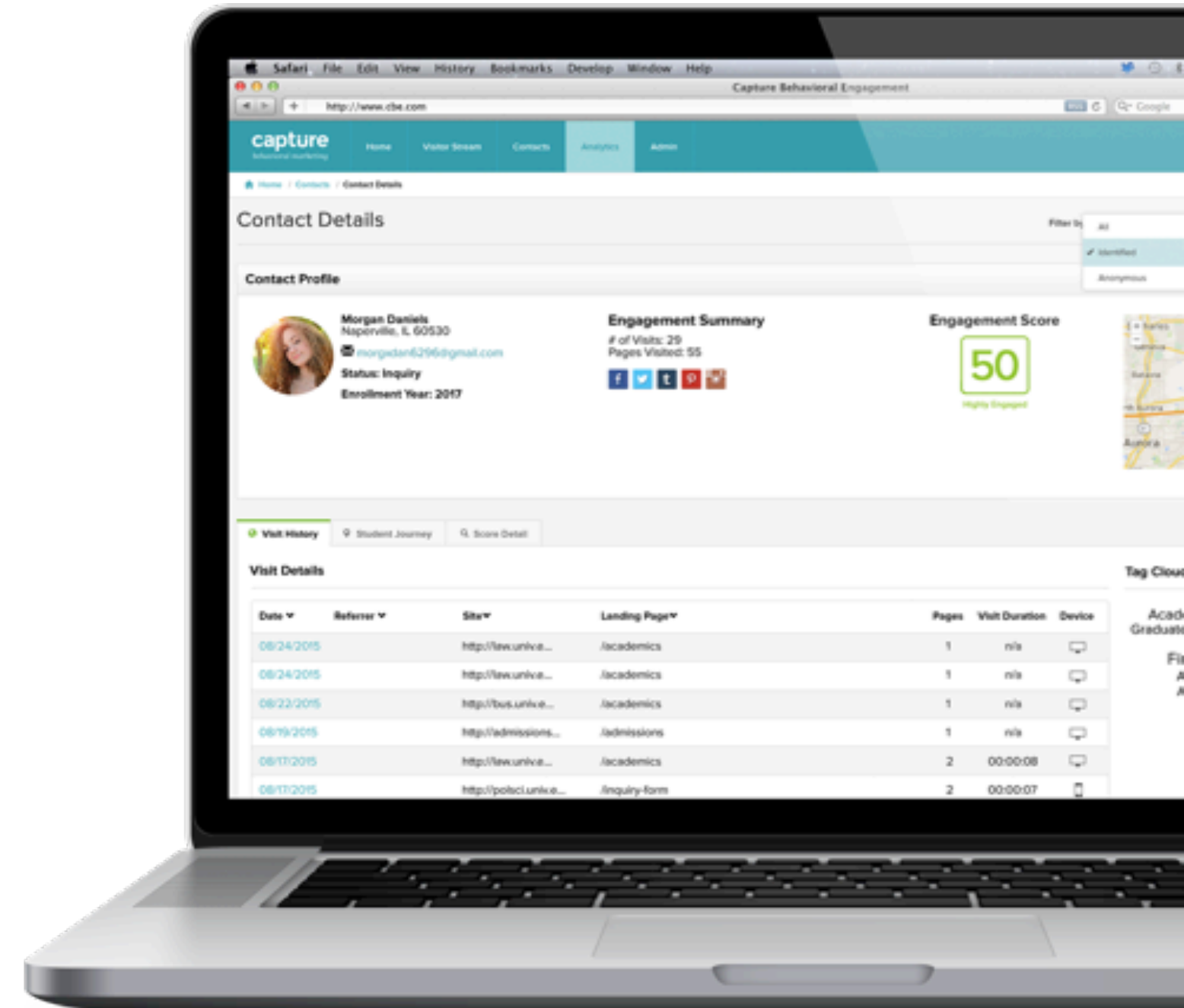
Identifying  
Planned Gift  
Interest





# How Are Visitors Identified?

Capture Behavioral Engagement  
=  
Marketing Automation For  
Higher Education



# Marketing Automation to Maximize Engagement & Outcomes...



Netflix Subscription

		RETURN						
		SUN 01 JAN	MON 02 JAN	TUE 03 JAN	WED 04 JAN	THU 05 JAN	FRI 06 JAN	SAT 07 JAN
DEPART	TUE 27 DEC	\$998 <sup>70</sup> WITH STOPS	\$1,044 <sup>70</sup> WITH STOPS	\$1,174 <sup>70</sup> WITH STOPS	\$896 <sup>70</sup> WITH STOPS	\$846 <sup>70</sup> WITH STOPS	\$825 <sup>70</sup> WITH STOPS	\$825 <sup>70</sup> WITH STOPS
	WED 28 DEC	\$918 <sup>70</sup> WITH STOPS	\$964 <sup>70</sup> WITH STOPS	\$1,094 <sup>70</sup> WITH STOPS	\$821 <sup>70</sup> WITH STOPS	\$771 <sup>70</sup> WITH STOPS	\$750 <sup>70</sup> WITH STOPS	\$750 <sup>70</sup> WITH STOPS
	THU 29 DEC	\$798 <sup>70</sup> WITH STOPS	\$841 <sup>70</sup> WITH STOPS	\$971 <sup>70</sup> WITH STOPS	\$698 <sup>70</sup> WITH STOPS	\$648 <sup>70</sup> WITH STOPS	LOWEST FARE \$627 <sup>70</sup> WITH STOPS	LOWEST FARE \$627 <sup>70</sup> WITH STOPS
	FRI 30 DEC	\$798 <sup>70</sup> WITH STOPS	\$841 <sup>70</sup> WITH STOPS	\$971 <sup>70</sup> WITH STOPS	\$698 <sup>70</sup> WITH STOPS	\$648 <sup>70</sup> WITH STOPS	LOWEST FARE \$627 <sup>70</sup> WITH STOPS	LOWEST FARE \$627 <sup>70</sup> WITH STOPS

Airline Fares

# WHO Visits the Planned Giving Site?

Who – What – When – Where

**01%** of All Alumni Visit Annually

**85%** of Visitors Do Not Have a Planned Gift Documented

**46%** of Visitors Would Not Qualify For Major Gift Officer Outreach

# WHO Visits the Planned Giving Site?

Who – What – When – Where

## The Challenge: Giving History

**50%** Did Not Give Last Year

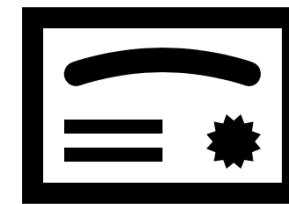
**24%** Have Not Given in a Decade or More

**\$100** Most Common Last Gift Amount

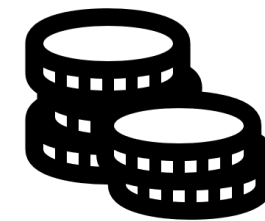
**\$101 - \$250** Most Common Capacity Rating



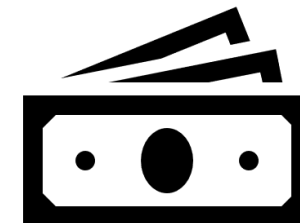
# Would **Amy** Be on Your Planned Giving Radar?



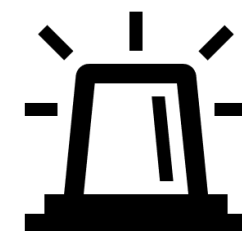
**Graduated In 1990**



**Last Gift Date is 2013**



**Lifetime Giving < \$2,500**



**Never Assigned**



# WHAT Is the Individual Area of Affinity?

Who – What – When – Where

## Real Life Example: Amy

July 10<sup>th</sup> (PG Page) – Reads Planned Giving Piece Directing to Website

July 25<sup>th</sup> (Alumni Page) – Three Minutes Reading About Scholarships

July 30<sup>th</sup> (Alumni Page) – Four Minutes Reading About Scholarships

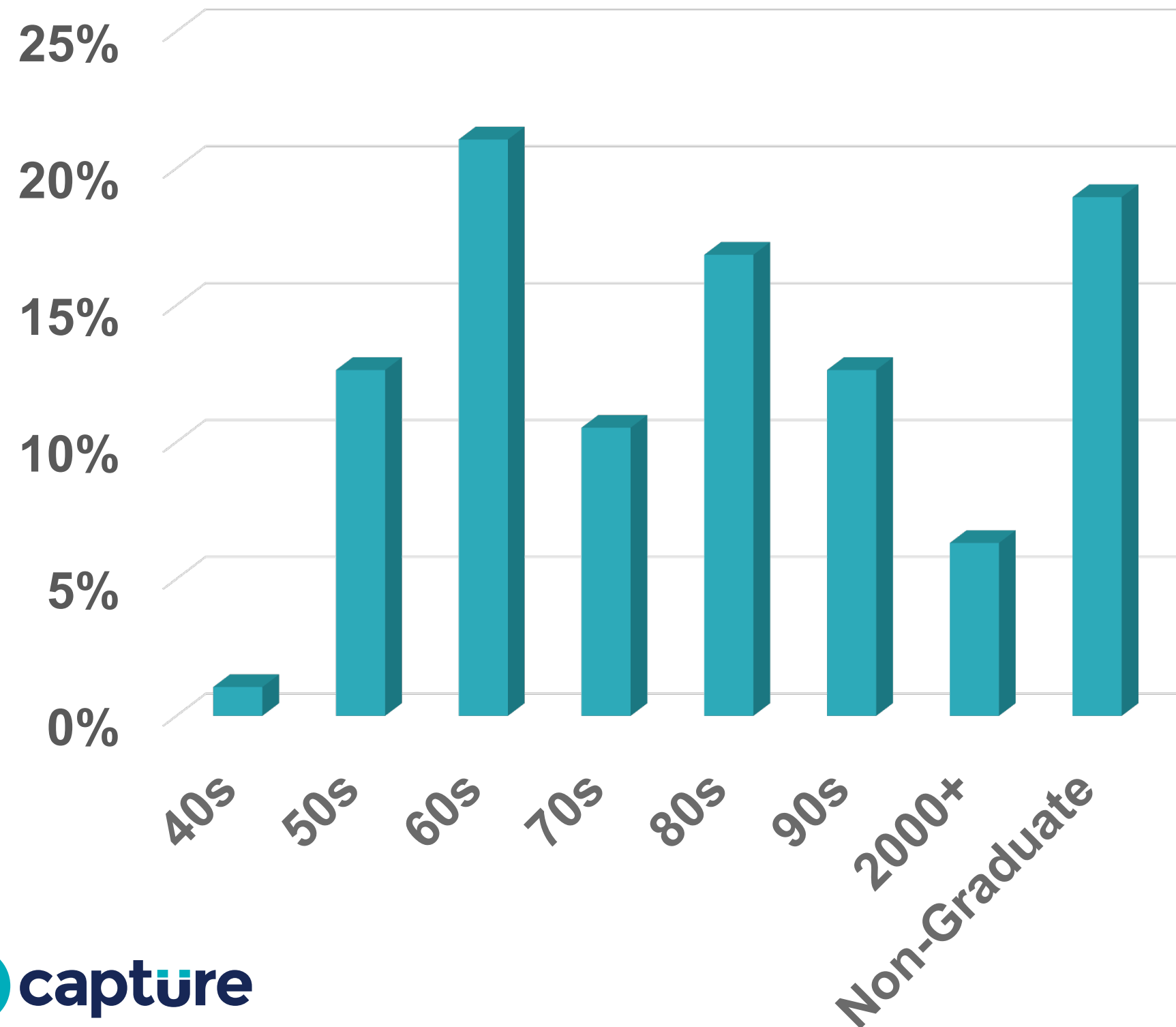
Aug. 2<sup>nd</sup> (Alumni Page) – Third Visit to Read About Scholarships

Aug. 6<sup>th</sup> (PG Page) – Downloads Multiple Resources from PG Site

**\*\*Many Visitors Bounce Between Athletics, Academic and PG Pages**

# WHEN to reach out?

Who – What – When – Where



## The Challenge: Grad Year

Generational Transfer of Wealth

Non-Graduates

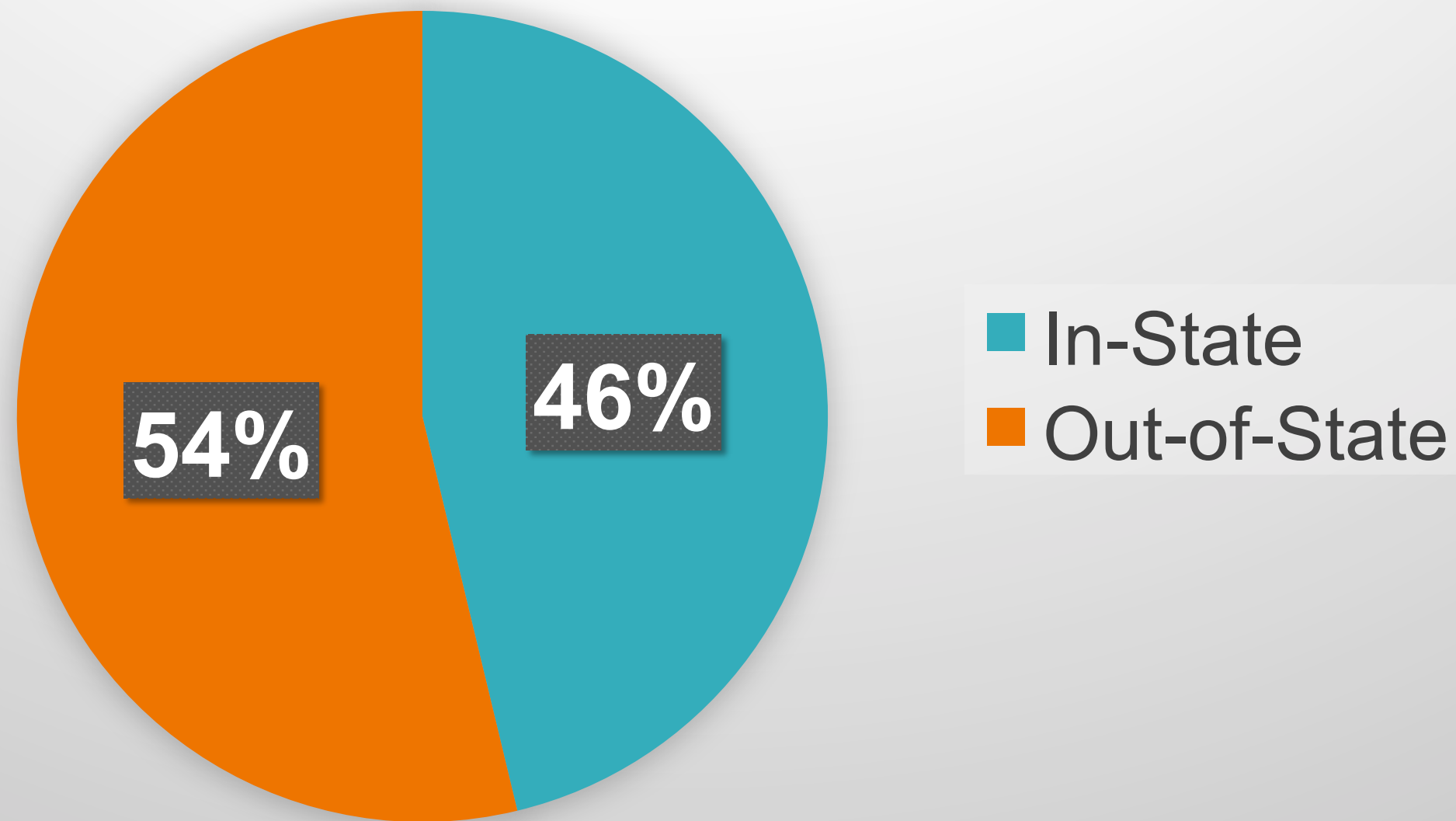
“The Goldilocks Moment”



# WHERE are Planned Giving Site Visitors Visiting From?

Who – What – When – Where

## Planned Giving Visitors by Geography



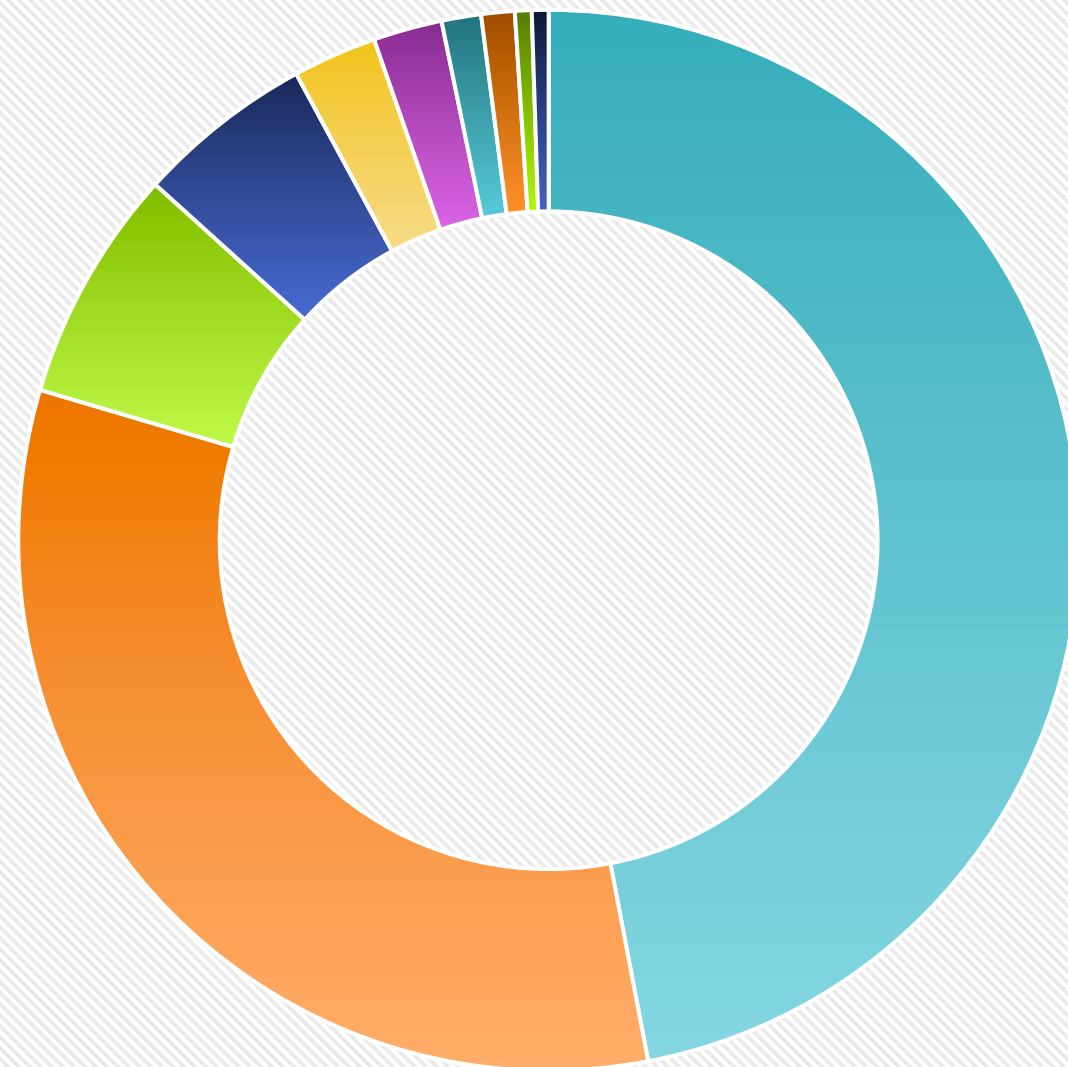
*More Than Half of Visitors to the Planned Giving Site Live Out-of-State*

*BUT...*

*Out-of-State Concentrations are Dispersed*

# What Can Athletics & The Main Page Tell Us About PG?

## Alumni Visit Habits

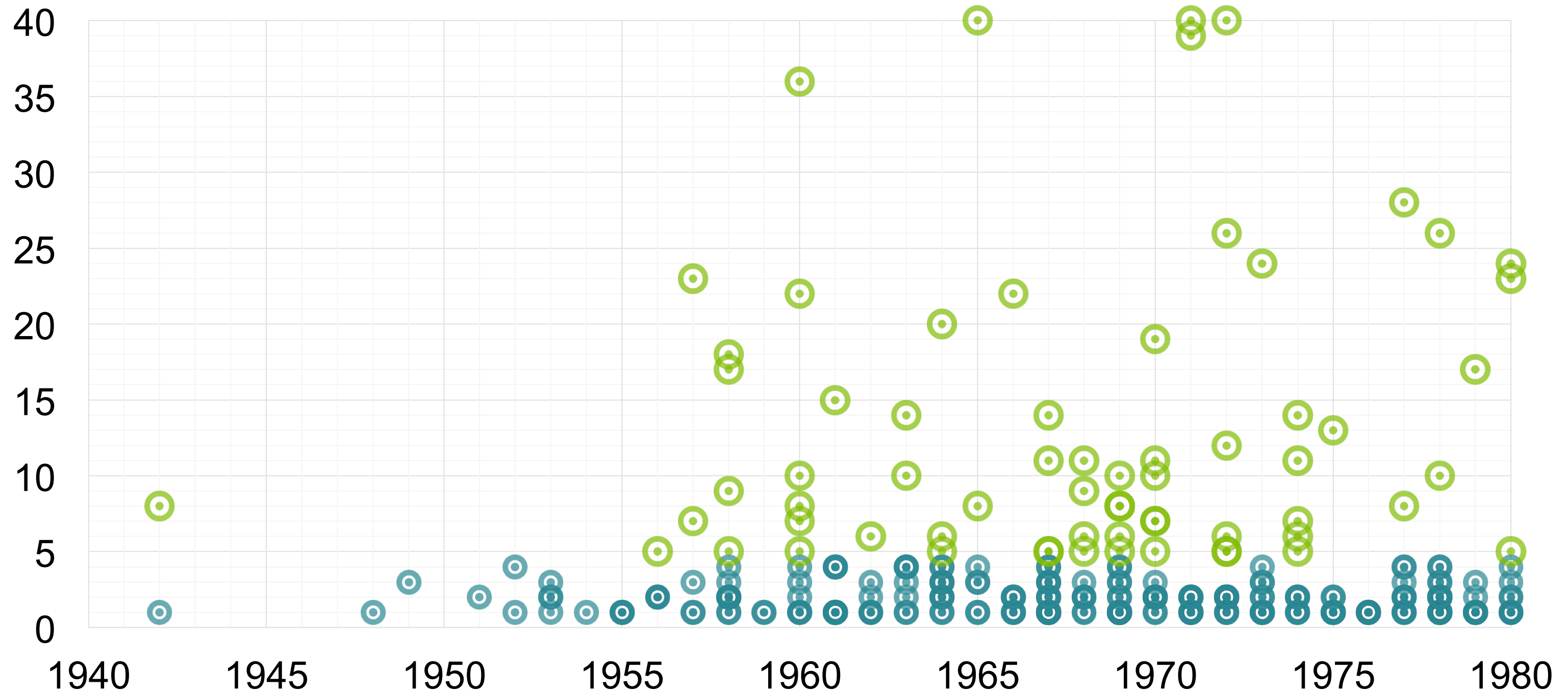


- ATHLETICS PAGE - 46%
- MAIN .EDU - 32%
- ALUMNI PAGE - 7%
- DAY OF GIVING PAGE - 5%
- ALUMNI E-NEWSLETTER - 3%
- EVENTS REGISTRATION PAGE - 2%
- CROWDFUNDING PAGE - 1%
- ONLINE GIVING PAGE - 1%
- NEWS PAGE - 0.5%
- PLANNED GIVING SITE - 0.5%



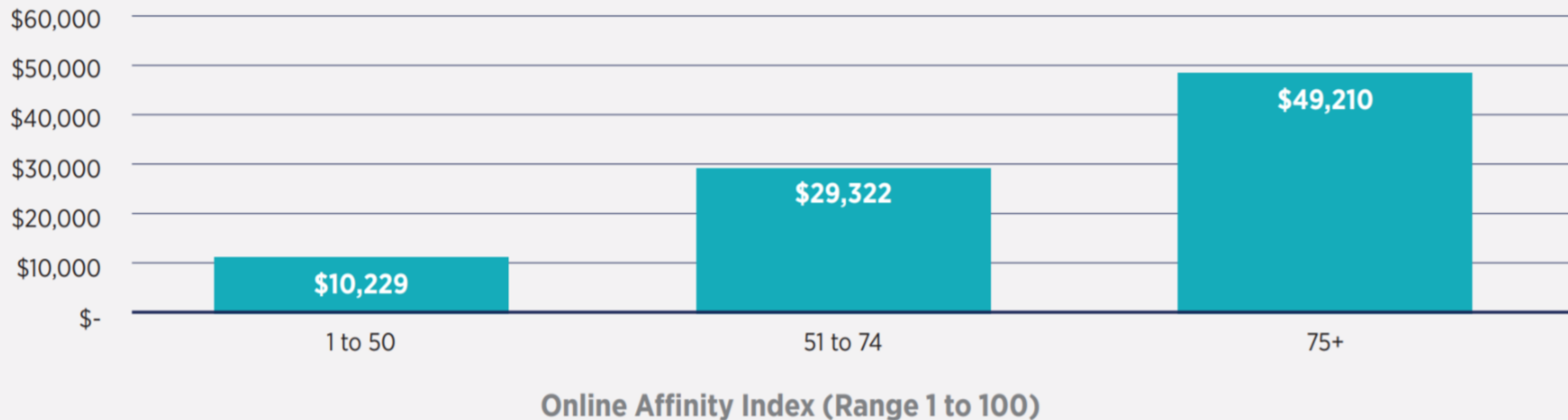
# Tracking Across the Website for High Affinity Older Alumni

Visit Habits of Graduates Prior to 1985



# What is the Relationship Between Online Activity and Lifetime Giving?

**Average Lifetime Giving by Online Affinity**





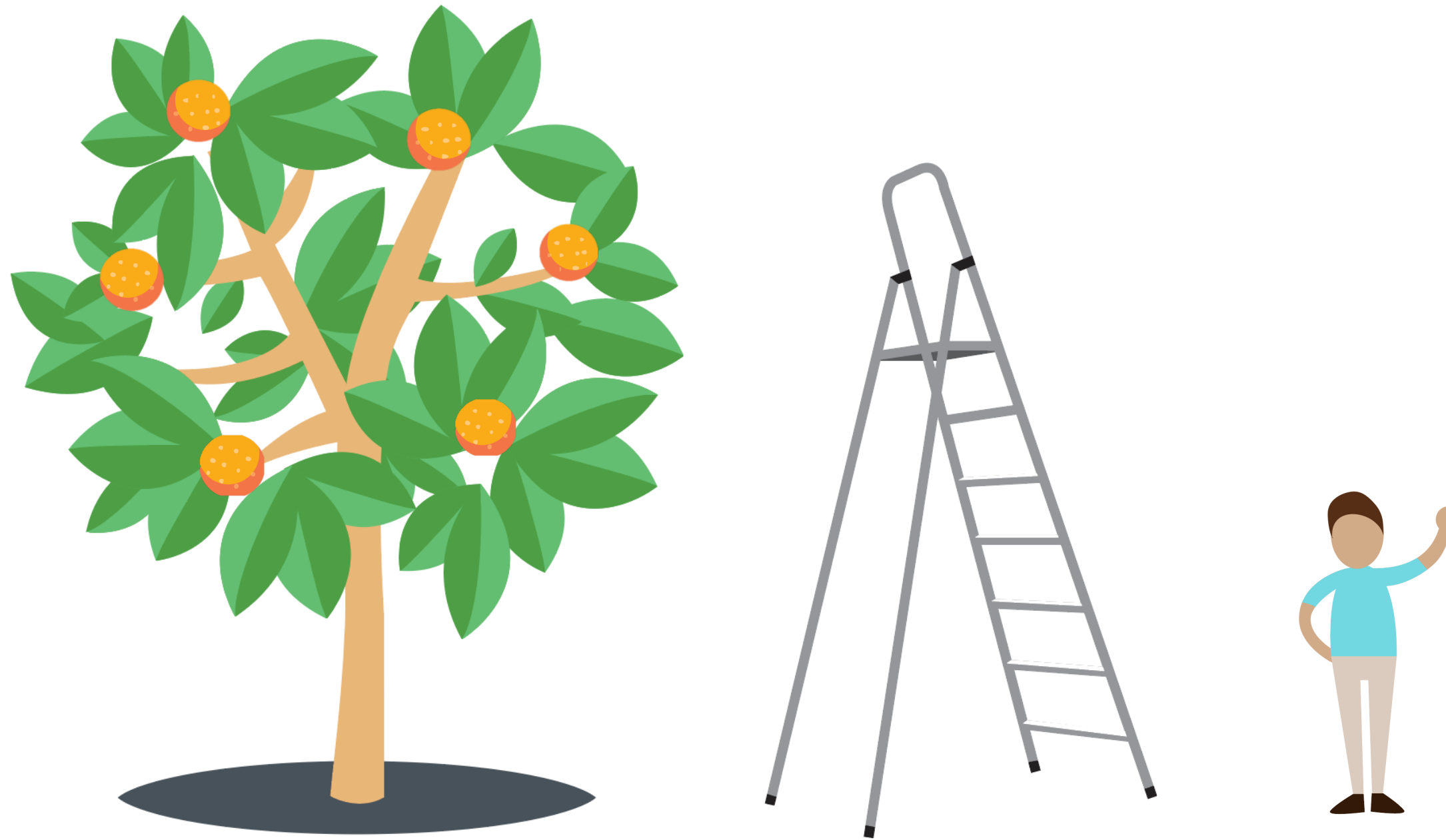
# Takeaways From Today



- 1. Messaging to “Younger Alumni”*
- 2. Travel!*
- 3. Leveraging your Entire Website*
- 4. Looking Beyond Gift Officer Portfolios*

# Scarcity of insight or inaccessibility of insight?

“A parable as told through an orange tree”







# capture

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