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Kermarquer, 56310
Melrand, France.
Telephone:
+33 (0)2 97 39 52 63.
Fax:
+33 (0)2 97 39 57 59.

Email:
ken@kenburnett.com

Bequest marketing was a mistake

Would you leave a bequest to an irritating, facile bunch of money-grubbing hustlers?

My working title for this article originally was 'At the end of the day, would you leave a bequest to an irritating, facile bunch of money-grubbing hustlers?' I was rather pleased with it. It pretty much summed up what I wanted to say in a sentence, I thought. And it allowed me an appropriate deployment of that over-used and much-abused phrase, 'at the end of the day'. For (at the end of the day) the subject of bequests and legacies really is all about how we'll feel at the end of our particular day. But though this headline might do in *Hello* magazine or even in one of the tabloids it's a bit verbose for an article in this learned journal, so I've thought better of it and I've made do with the much more succinct yet challenging title you find above.

I feel I should make a confession. In my life so far I've made lots of mistakes and one of my biggest, and with hindsight most obvious and most avoidable, was when, many years ago, I espoused and began to evangelise for the then virtually unknown practice of legacy marketing (better known in the US as bequest marketing).

I really regret that now. I'm talking here not about marketing as a theoretical, academic subject but as it is practised day in day out, by today's nonprofits.

It's not that I no longer believe bequest marketing works. It does, and I have experiences that prove it. But then, just talking about bequests works. Printing 'We depend on bequests' on your letterheading works. Telling your supporters in your newsletters and face to face about how much you've achieved thanks to bequest X and bequest Y will, in the fullness of time (I resisted another use of the 'ateotd' phrase), also work rather well. Consistently and positively making the case for bequests at every appropriate opportunity will also work, often spectacularly and probably at an impressively low cost to income ratio. The promotion of charitable bequests may take longer to reach fruition than most other forms of commercial undertaking, but there is no doubt that bequests can be successfully promoted by those with a little skill, some politeness and *savoir faire* and reasonable amounts of commitment and patience.

But the question is, *how* should they be promoted? For though bequest marketing may indeed work, it may be unwise. Donors don't want to be marketed at. They never have done. They particularly don't welcome a nonprofit 'selling' them the concept of leaving money to that nonprofit after their death. And those qualities I list above for the successful promotion of bequests,

sadly are usually absent in bequest marketing and the people who practise it.

Rather obviously, persuading — or even suggesting, or even gently hinting — that someone should leave your organisation a bequest is something that should be done with great delicacy and sensitivity. My favourite example of how this task can go painfully awry in the hands of marketing types was found in the early days of bequest marketing, when Britain's Save the Children Fund wrote to their donors with, emblazoned on their outer envelope, the starkly poignant message DO YOU BELIEVE IN LIFE AFTER DEATH? The example I saw of this pack, addressed to a Mrs Crosby, had been returned to SCF simply marked 'deceased'. Mrs Crosby, I guess, could have answered the question but I doubt she did, even for that worthy cause.

Surprisingly, though my wife and I support more than a few charities, only one that I can think of has written to us recently on the 'B' subject. And that letter was fairly inoffensive and instantly forgettable.

Indeed most bequest promotions share the fate of most fundraising communication. That is, they will find acceptance if not quite favour with a tiny minority while offending some, irritating more than a few and eliciting indifference from the majority (thereby finding their way swiftly into the waste bin, often unopened).

I'm sorry if you find this a negative, jaundiced view of the craft of nonprofit communication, but the evidence of my eyes and what donors tell me combine to assure me that in most cases it's a fair one.

The way forward

I'm being deliberately challenging, of course, to make a point. The question is, if it isn't through marketing, how should fundraisers be encouraging their donors to leave them a bequest?

The answer, I submit, is to be found in a deep analysis of our donors' motivations, desires and interests, and a keen understanding of why they might decide to leave us a bequest. At the end of a lifetime of supporting a particular cause perhaps just in a small way, why would any of your donors choose to leave a truly major gift?

And if we can divine that motivation, is it something we can tap into by direct mail? Only if we're really, really good, I would submit. Only if we can write copy, as George Smith put it in his brilliant little book the *Tiny Essentials of Writing for Fundraising* (White Lion Press 2003), which will make our donor's heart soar. What he actually wrote was

‘I suggest your heart would soar if – once in a while – you received a letter written in decent English which said unexpected things in elegant ways, which moved you and stirred your emotions, which angered you or made you proud, a letter which you wanted to read from beginning to end, a letter apparently written by one individual to another individual. For you never see these letters any more...’

Sad that, but true. The key to success in bequest promotion, as in all forms of fundraising, is to realise that when seeking to stimulate a voluntary act such as a gift for a cause, we’ll do much better if we send our donors what they want to receive rather than what we want them to have, if we communicate what they want to hear rather than merely what we want to say.

The secret of success is to realise that at its heart fundraising is little more than telling great stories very well. And it is nothing less than the inspiration business. For we don’t just ask for money, we inspire it. In no arena of fundraising is this truer than in the raising of bequests.

Often it seems our job – the raising of money – just gets harder and harder. But it also sadly seems that, as it gets more difficult, we fundraisers find ourselves having to stoop ever lower to raise it. That doesn’t seem very desirable or sustainable to me. We’d better find another way. And soon.

The majority of fundraisers would agree that ours is one of the most challenging and difficult of all business areas. And few would deny that finding new donors in sufficient volume and at acceptable cost still seems to be the major preoccupation of most fundraisers. Yet fundraisers seem unable to elevate their communications beyond the simple, often very crude act of asking for money.

As a result, fundraising communications are frequently crass, regularly irrelevant, usually unwelcome and mostly fit only for the dustbin. They don’t often help us to build the kind of relationship we need, with today’s donors.

Many fundraisers would find that observation hard to accept. Yet it is how many of our donors and potential donors see us and our communications. Because the marketing paradigm compels fundraisers to constantly communicate at the lowest common denominator, we so often fail to inspire our donors, instead leaving them unwilling or unable to help, uncomfortable and unhappy. They don’t often enjoy the experience of supporting our cause, and many leave.

I’m not talking here about the academic discipline of marketing. I’m talking about the modern fundraising paradigm as it’s practised today, the hard-sell marketing, which despite many efforts to change direction remains the dominant practice among

fundraisers.

I believe this paradigm is seriously flawed. It isn't what our customers want. And it no longer helps us raise the money we need to do our important jobs.

Fundraising nowadays is typically focused on replacing lost donors. McKinsey & Co estimates that \$36 billion is spent each year on fundraising in the United States, mainly in the acquisition of new donors. As it is up to 11 times more expensive to find a new donor than to keep an existing one, billions of real dollars are wasted each year in nonprofits' ongoing and expensive efforts to replace the donors they routinely lose in a downward spiral of churn and burn.

Simultaneously, our donors' needs and levels of engagement are changing. While yesterday's charity giver blithely sent cheques, blindly hoping that they would do good, today's supporters are less trusting. They want more solid evidence that their giving will make a difference. They want to get more involved – they expect higher visibility into and greater accountability from the nonprofits of their choice. This, of course, requires more sophisticated, more involving communications. But since organisations have thousands even tens of thousands of donors to interact with, personalising communications for each supporter is simply too labour-intensive and cost-prohibitive...

So instead of our current customers acting as advocates for our cause, recruiting their friends in volume, what we see is 50 to 70 percent of our expensively recruited first time givers 'lapsing' before their second or third gift. What we should be seeing is these people falling over themselves to be our best ambassadors. They shouldn't be lapsing or cancelling after a few unhappy months. They should be loving it so much they sign up all their friends. Instead we are losing our donors, wholesale.

That's why I say marketing was a mistake, not just for the bequest fundraiser but also for all fundraisers. We should switch the current fundraising/marketing paradigm to a new fundraising/communication paradigm.

And embrace the communications revolution that, thanks to a new attitude and the advent of some spectacular new technology, will very soon be coming our way.

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