|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Answer qualification survey** |  | **Answer to survey asking for additional information – must**  **establish where they are on these points of the journey** |  |  |  |  |
| **LEGACY SUPPORTER JOURNEY STAGES** | LJ01 | LJ02 | LJ03 | LJ04 | LJ05 | LJ06 | LJ07 | LJ08 | LJ09 |
| **DEFINITION** | **Rejecters**“I’m **not writing** a will” OR“I’m **not leaving** a gift in my will to ORG” | **Pre-consideration unaware of bequests** “I’m **unaware** & **unsure** if I would consider leaving a gift to ORG in my will”**(DEFAULT POSITION)** | **Pre-consideration aware of ORG bequests** “I’m **unsure** if I would **consider** leaving a gift to ORG in my will, although I’m aware of it”PROACTIVE | **Consideration Level 1** “I will positively consider leaving a gift to ORG in my will by **looking** at what you send me”PROACTIVE DONOR | **Consideration Level 2** “I will positively consider leaving a gift to ORG in my will by **thinking** about it” | **Consideration Level 3** “I will positively **consider** leaving a gift to ORG in my will by **actively searching for information**” | **Preparation** “I **intend** to leave a gift to ORG in my will” | **Maintenance** “I **have** included a gift in my will to ORG” | **Gift** “They **left** a gift in their will to ORG”(passed away – gift realized) |
| **MESSAGES**What's going to inform/guide our conversations? | Understanding objectionsOvercome barriers | Acknowledge the individualTailor the conversationUtilise life stage triggers | Understand and overcome barriers | What would tip someone over into preparation?What are the barriers/considerations at this stage? |  |  | Keep momentum going – ensure they complete ACTION | Thank you Testimonial - whyStewardshipPersonalised communication | Thank you/gratitude to next of kinTell us why they left us a gift  |
| **EMOTION & THINK** How do we want supporters to feel & think? | REASSUREDUNDERSTOOD | INFORMEDENGAGED | INFORMEDENGAGED | INSPIREDINFORMED | INSPIREDINFORMED | INSPIREDINFORMED | EMPOWEREDMOTIVATEDREASSURED | RECOGNISEDVALUEDINFORMEDCONNECTED | VALUEDINFORMED |
| **LEGACY GIVING**What we want to say? | We understand/accept their rejection | Show the importance to the cause | Show the importance to the cause  | Show them the difference it will make | Show them the difference it will make | Show them the difference it will make | Show them we can be trusted | Keep them informed | Show outcomes/impact of gift |
| **WILL WRITING**What do we want supporters to do? | *Nothing at this stage* | *Demonstrate the future impact and personal benefits* | *Demonstrate the future impact and personal benefits* | *Provision of quality information* | *Provision of quality information* | *Provision of quality information* | *Make it easy for them* | *Keep it up to date* |  |
| **CHANNELS**How **could** we generate/continue our conversations? | *Continue to drip feed legacy message through Supporter communications* | *Supporter communications**Cross sell* *Special events* *3rd party events* | *Direct Mail**Telemarketing**Online* *National Press* | *121 relationships**Web pages**Legacy events* | *121 relationships**Web pages**Legacy events* | *121 relationships**Web pages**Legacy events* | *121 relationships**Conversion activity**Special Events**Website for tools* | *Special Events**121 relationships**Supporter club/group/society* | *Letters/cards/telephone* |
| **TOOLS** How **potentially** could we support our conversations? | *TV/Radio Ad**Press Ad**Integration messages* | *TV/Radio Ad**Press Ad**Microsite**SEO/Pay Per Click**Integration messages**Bookmark/Flyer**Press release**Greenpeace Legacy guide* | *ORG bequest guide**Telemarketing**Advertorial**Professional press advertising*  | *Codicil* *ORG bequest guide**List of notaries/solicitors/attorneys?* *Nurture (conversion) pack* | *ORG bequest guide**Test & learn with existing ORG materials – annual reports, film* | *ORG bequest guide**Test & learn with existing Org materials – annual reports, film* | *Online legacy calculator (like a shopping list)?**Org bequest guide* | *Connection gifts (letters from specific programs donor is interested in)**Thank you pack-call**Recognition**Handwritten note**Capture stories of the donor* | *Special events* *Family letters**Capture stories of the donor* |