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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **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 objections  Overcome barriers | Acknowledge the individual  Tailor the conversation  Utilise 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 - why  Stewardship  Personalised communication | Thank you/gratitude to next of kin  Tell us why they left us a gift |
| **EMOTION & THINK** How do we want supporters to feel & think? | REASSURED  UNDERSTOOD | INFORMED  ENGAGED | INFORMED  ENGAGED | INSPIRED  INFORMED | INSPIRED  INFORMED | INSPIRED  INFORMED | EMPOWERED  MOTIVATED REASSURED | RECOGNISED  VALUED  INFORMED  CONNECTED | VALUED  INFORMED |
| **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* |