

# FIA Conference 2023

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# How Greenpeace and Community Shapers are redefining best practice for Gifts in Wills calling

## GIFTS IN WILLS

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# Intro & Agenda

## 1. Myth Busting & Telemarketing Wisdom

### 1. Acquisition

- a. Prospects

### 1. Conversion

- a. Enquirers
- b. Considerers
- c. Intenders

### 1. Relationship Building

- a. Pledgers

### 1. Demographics

### 1. Conclusion

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**Protect future generations.**



**Give in your Will**



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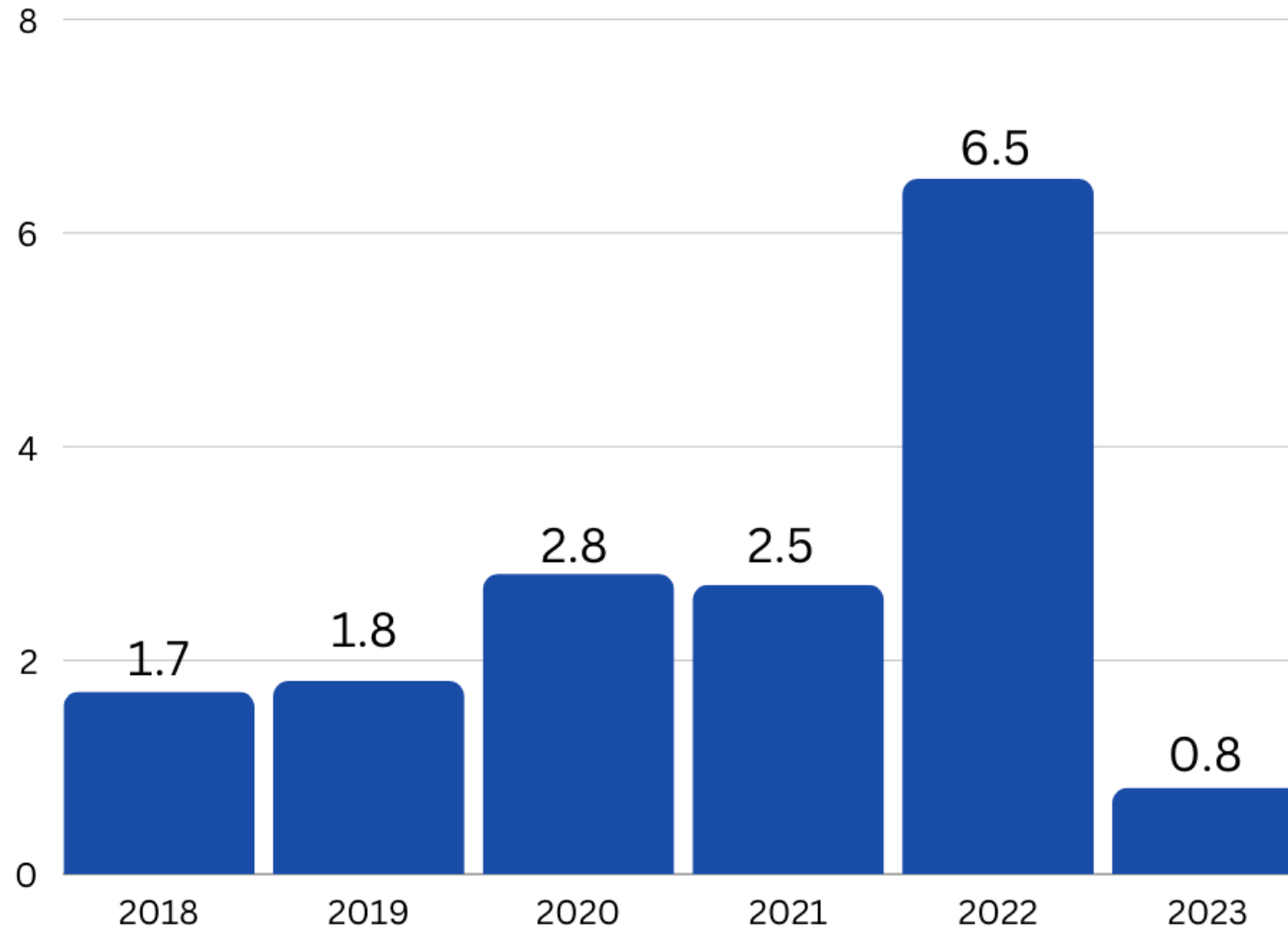


# 1. Myth Busting

- Calls are about death...
- Callers need to be mature age
- Calls should be made in-house



# Greenpeace GIW Income in \$million



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# Meet Will...

*“...to really hear what matters most to them; not just right now, but something that has mattered deeply to them for their whole lives...”*



# What does Greenpeace want in a telemarketing partner

- Shared values and charity minded callers
- Knowledge of environmental issues, news and current affairs
- Motivation: Extrinsic vs intrinsic



**TOO MANY HATS?**

**NEVER**

# 2. Acquisition - Prospects

A. Main concerns for prospect calling

A. Segmentation

A. Results





# Concern handling - Prospects

*"I'm not ready to talk about this yet..."*



# Segmentation

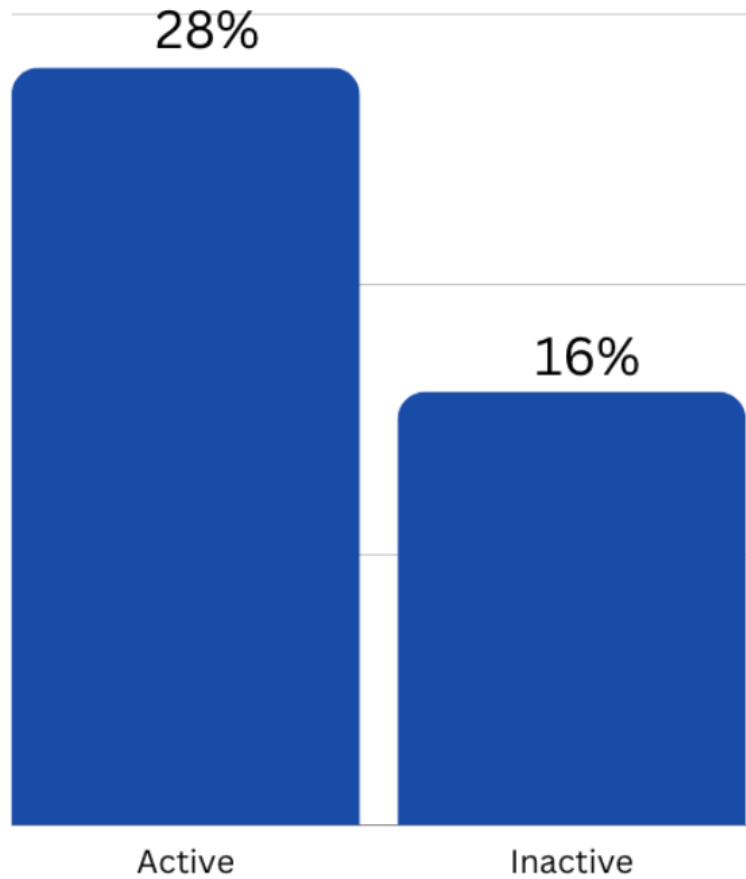
- Active Status
- Age
- Channel
- Machine learning & propensity modeling



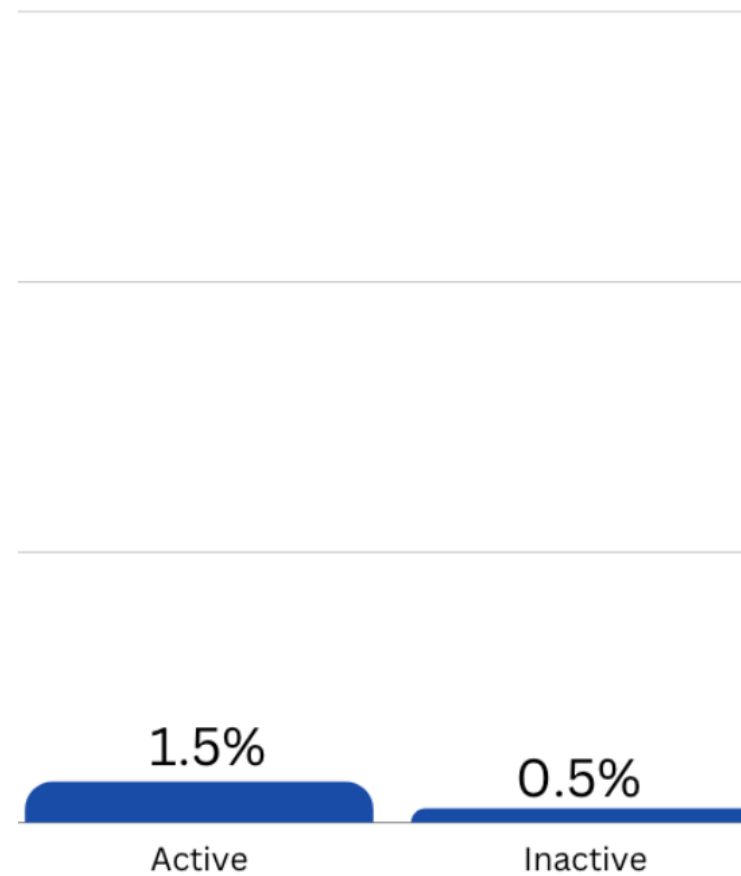


# Drill down - Comparing status

Conversion to Considerer



Conversion to Pledger

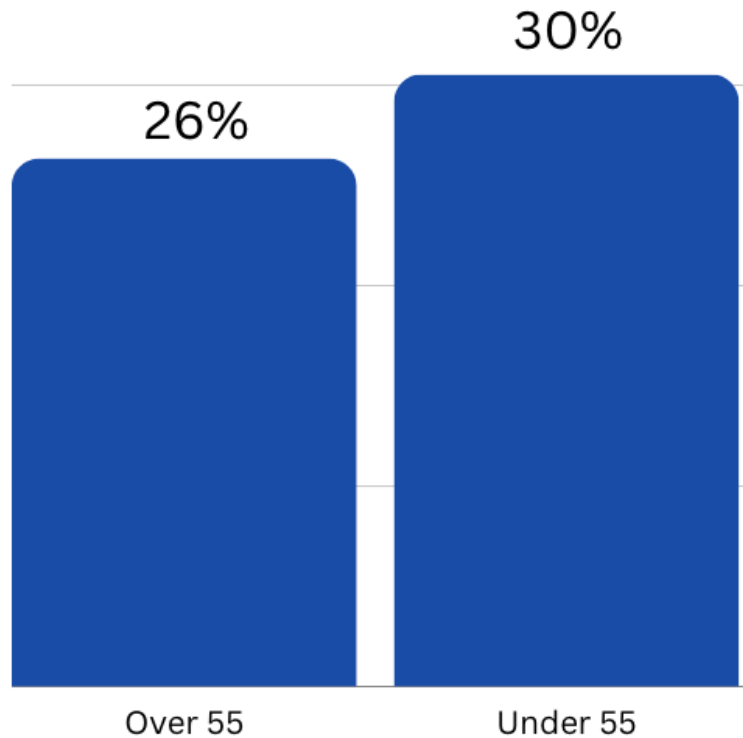


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**1191** inactive conversations  
**6109** active conversations

# Drill down - Comparing age

Conversion to Considerer



Conversion to Pledger



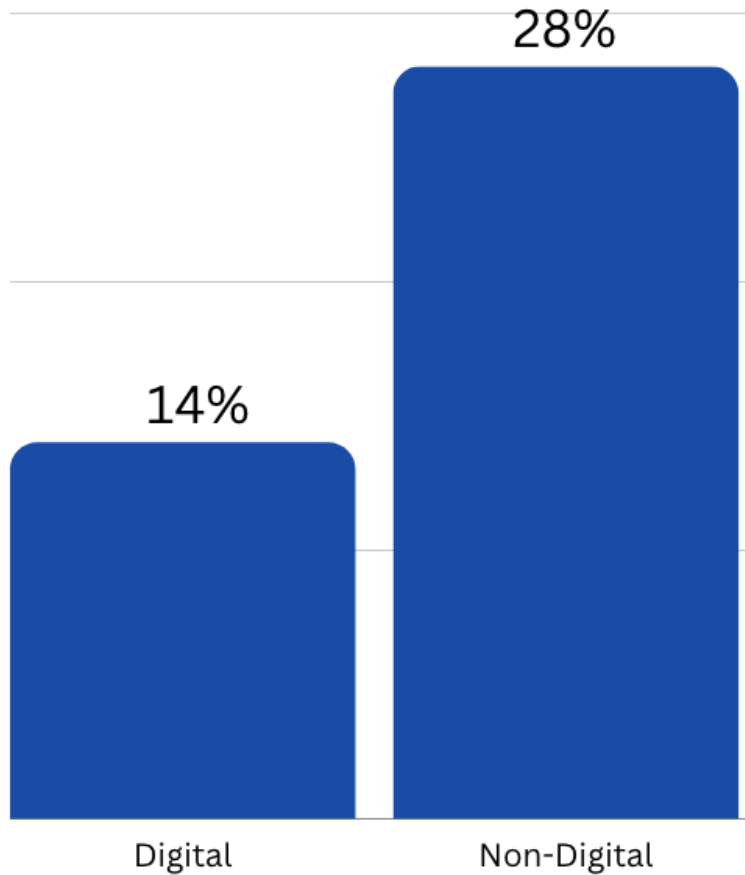
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**610** conversations under 55  
**925** conversations over 55

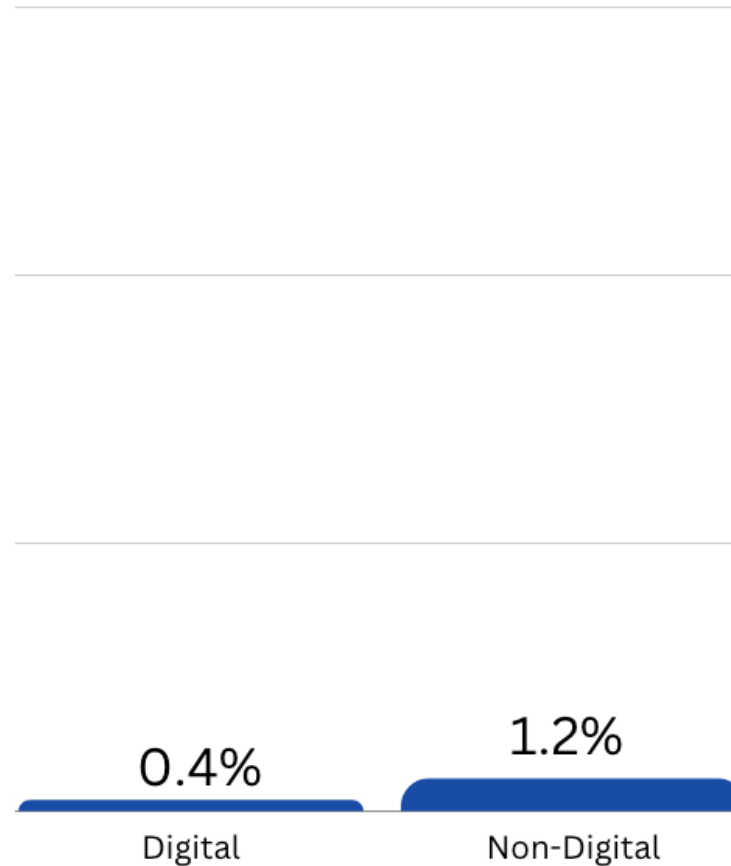


# Drill down - Comparing channel

Conversion to Considerer



Conversion to Pledger

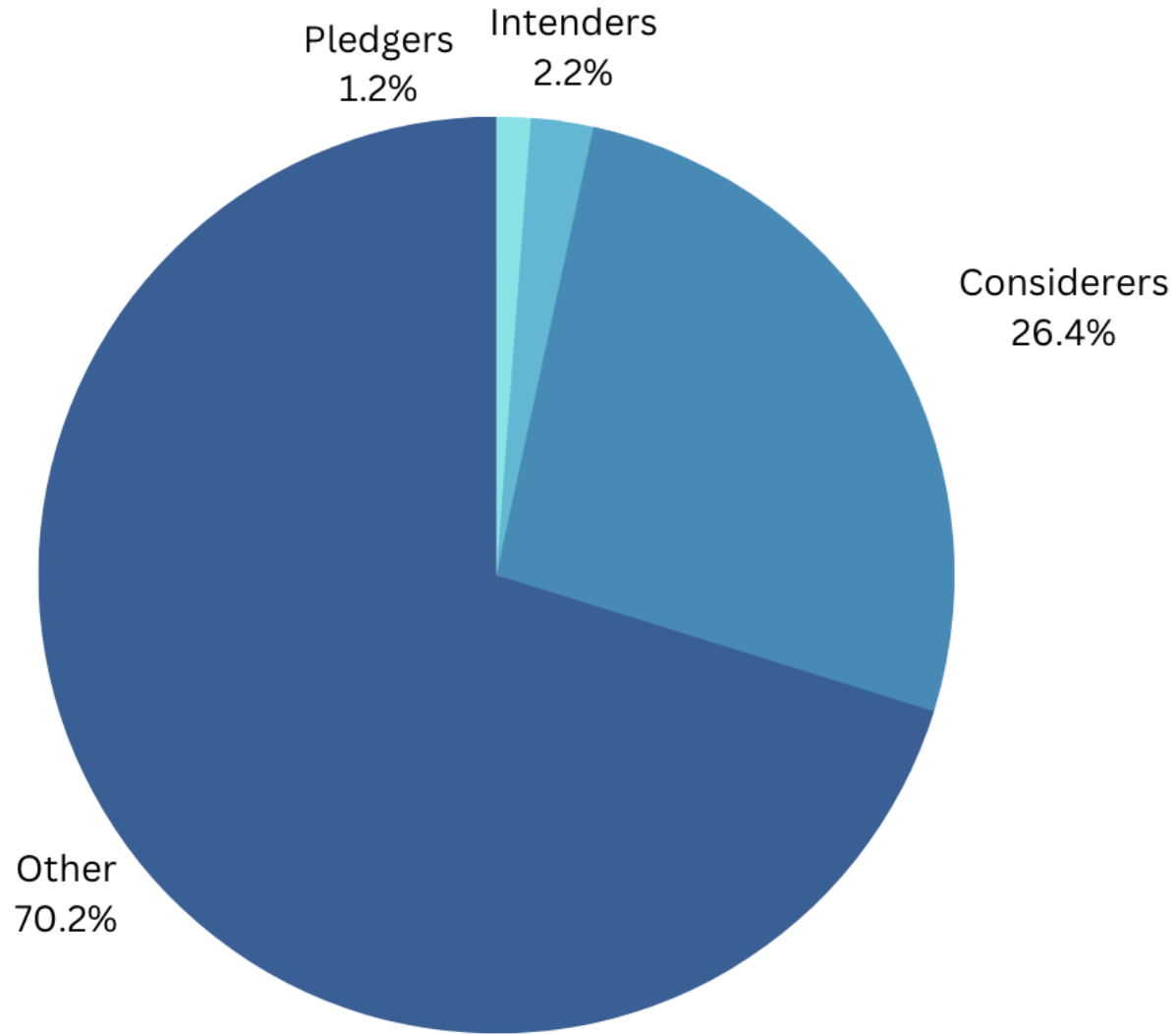


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**500** conversations for digital  
**6800** conversations for non-digital

# Overall results

## Conversion for Prospects calling



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**7,305 conversations**



# Prospect calling - Key takeaways

- Status & Age matter
- 28% of conversations resulted in a brochure
- Self-identified prospects can perform as well as propensity generated prospects
- Added fundraising value from digital leads entering the database for the first time

# 3. Conversion - Enquirers, Considerers, Intenders

A. Main concern for each segment

A. Results



# Concern handling - Enquirers

*“I’m not sure I have enough money to do that...”*





# Concern handling - Considerers

*“I want to leave everything to my kids/family”*



'Well, my Grandpa gave  
my inheritance to Greenpeace'

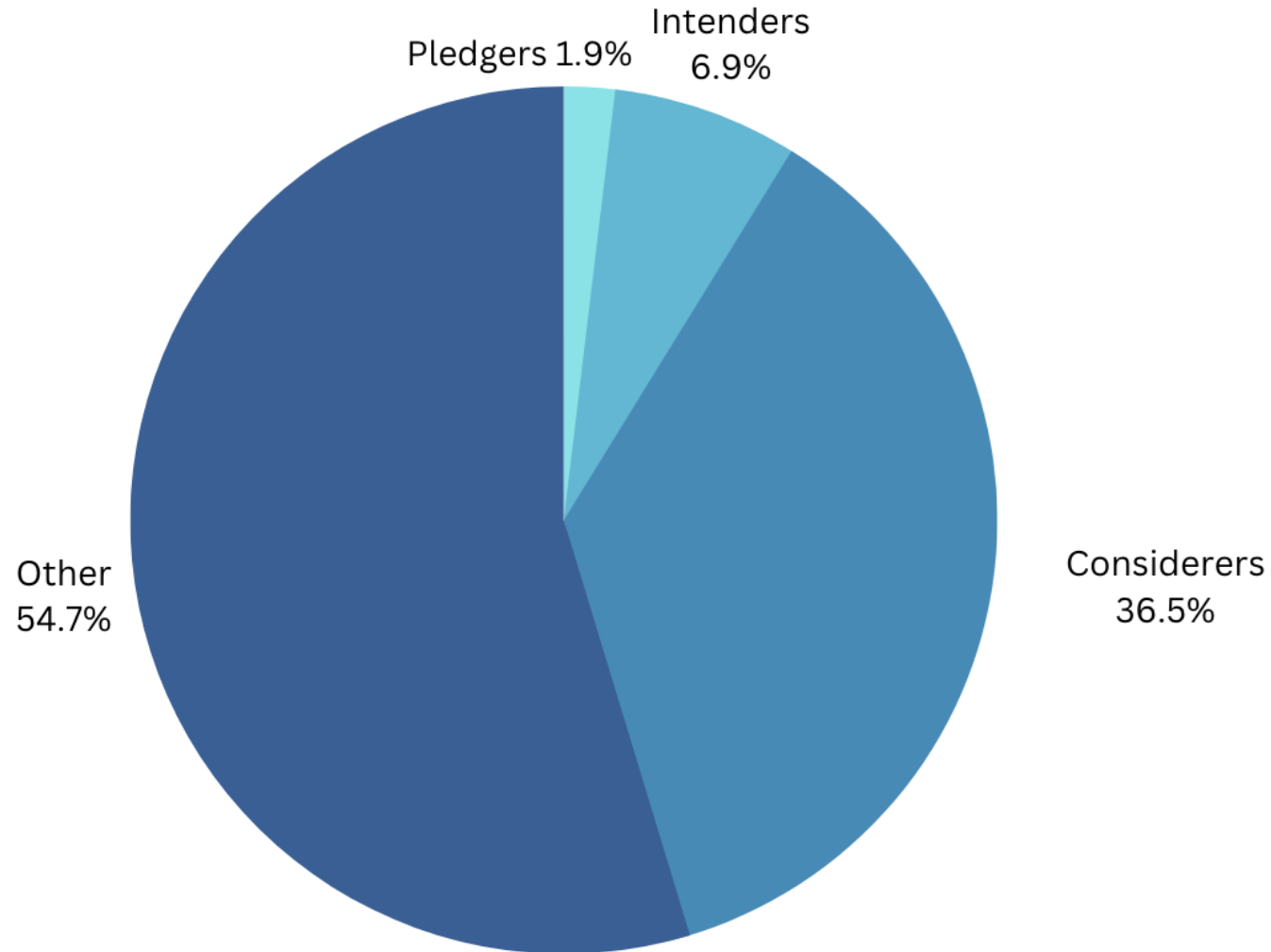
# Concern handling - Intenders

*“I’m leaving gifts to different organisations”*



# Results - Enquirers

## Conversion for Enquirers calling



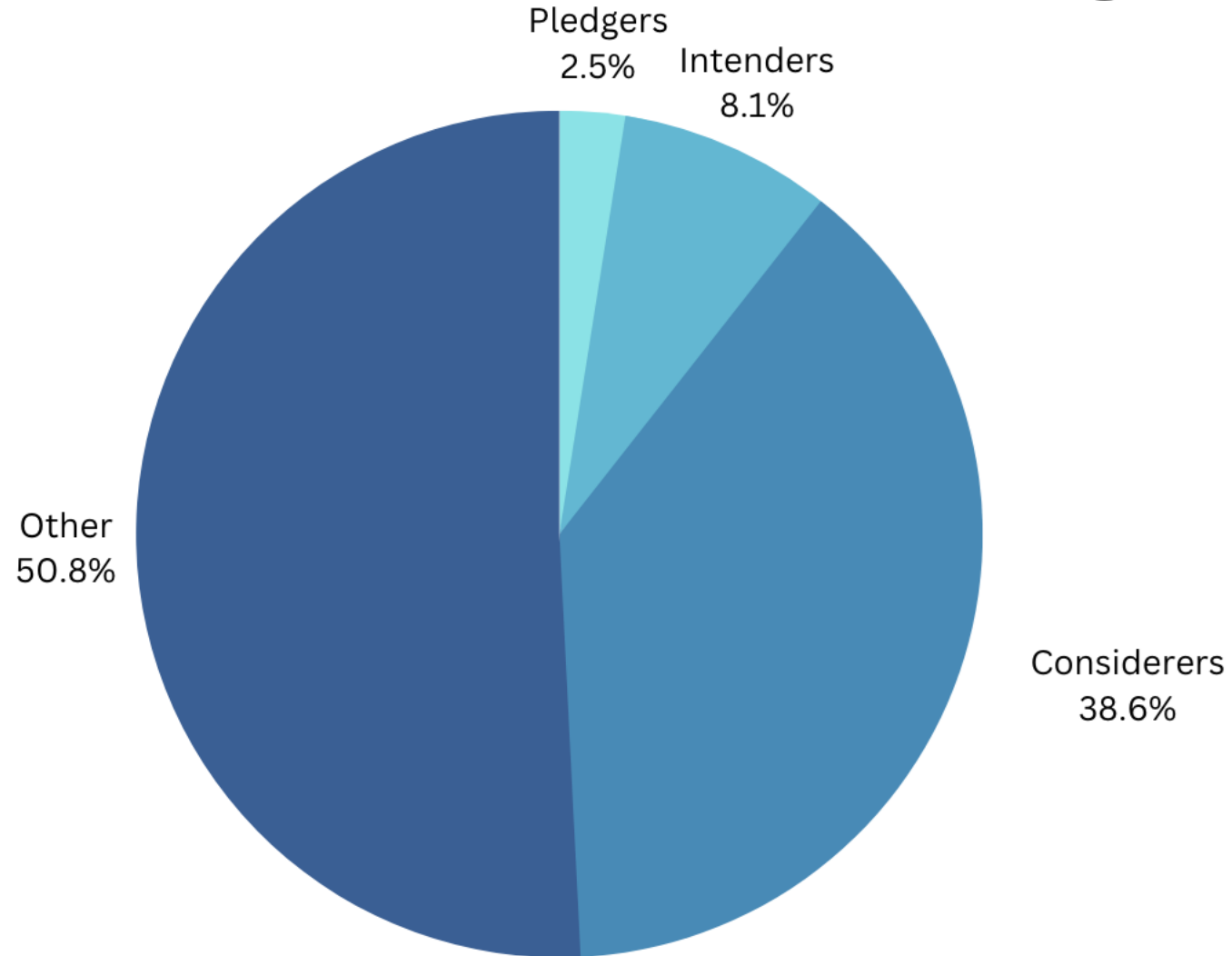
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**2,592 Conversations**



# Results - Considerers

## Conversion for Considerers calling

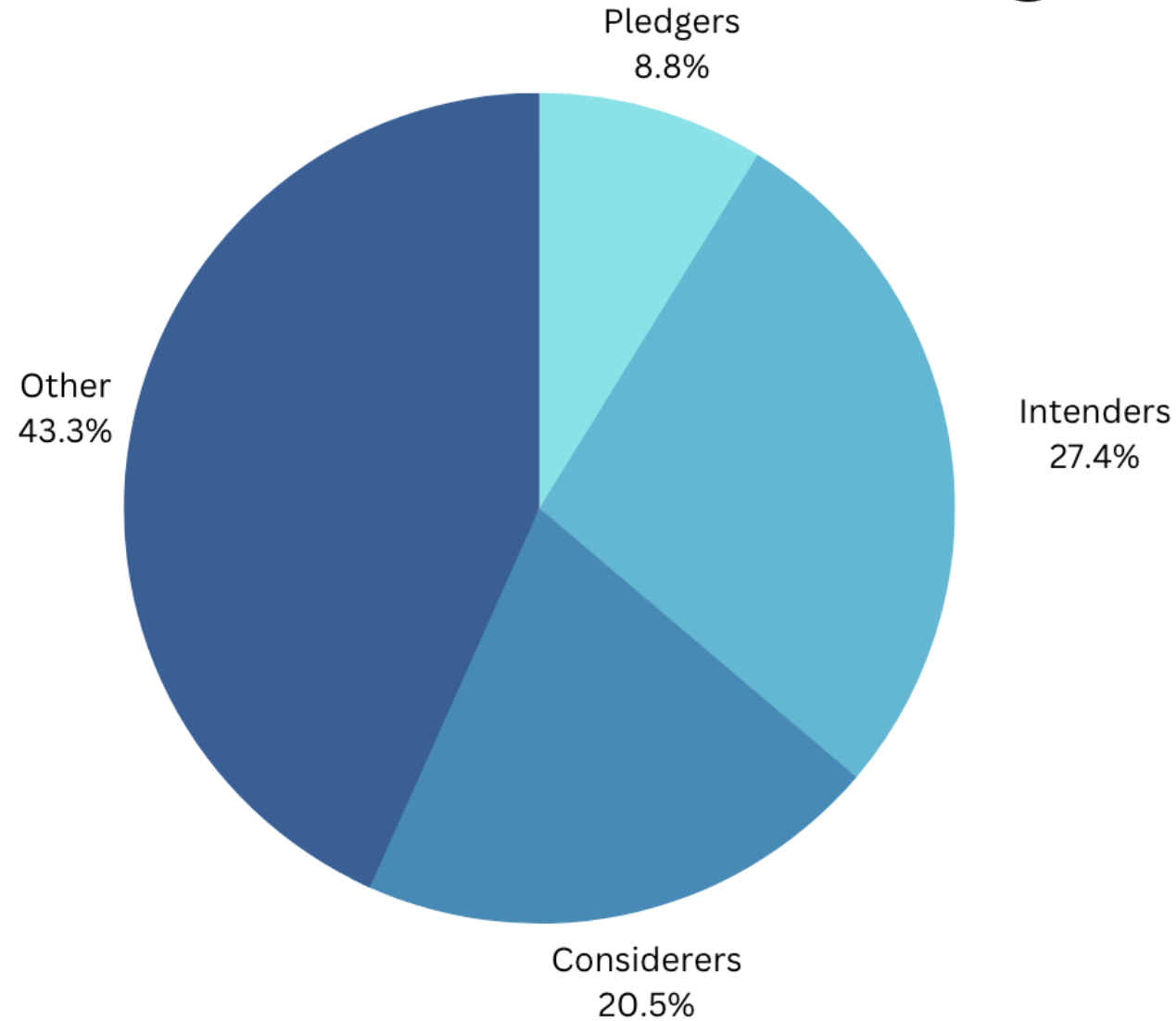


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1,290 conversations

# Results - Intenders

## Conversion for Intenders calling



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605 conversations

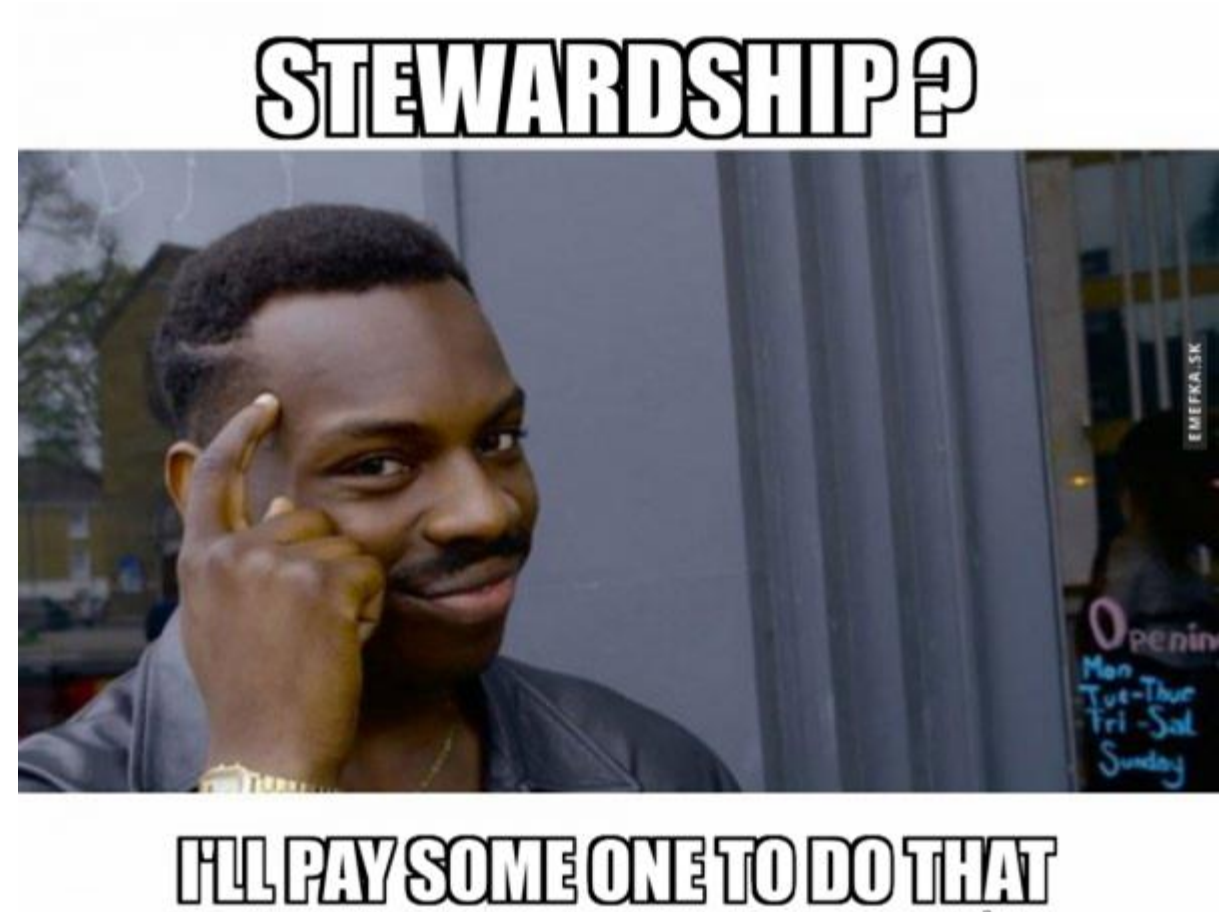
# Conversion - Key takeaways

- Almost 10% of intenders became pledgers
- Lists burn-out over time
- Follow up journeys
- 2 year cycle
- Conversion increases as we call up the pipeline

# 4. Relationship Building - Pledgers

A. Stewardship

A. Results





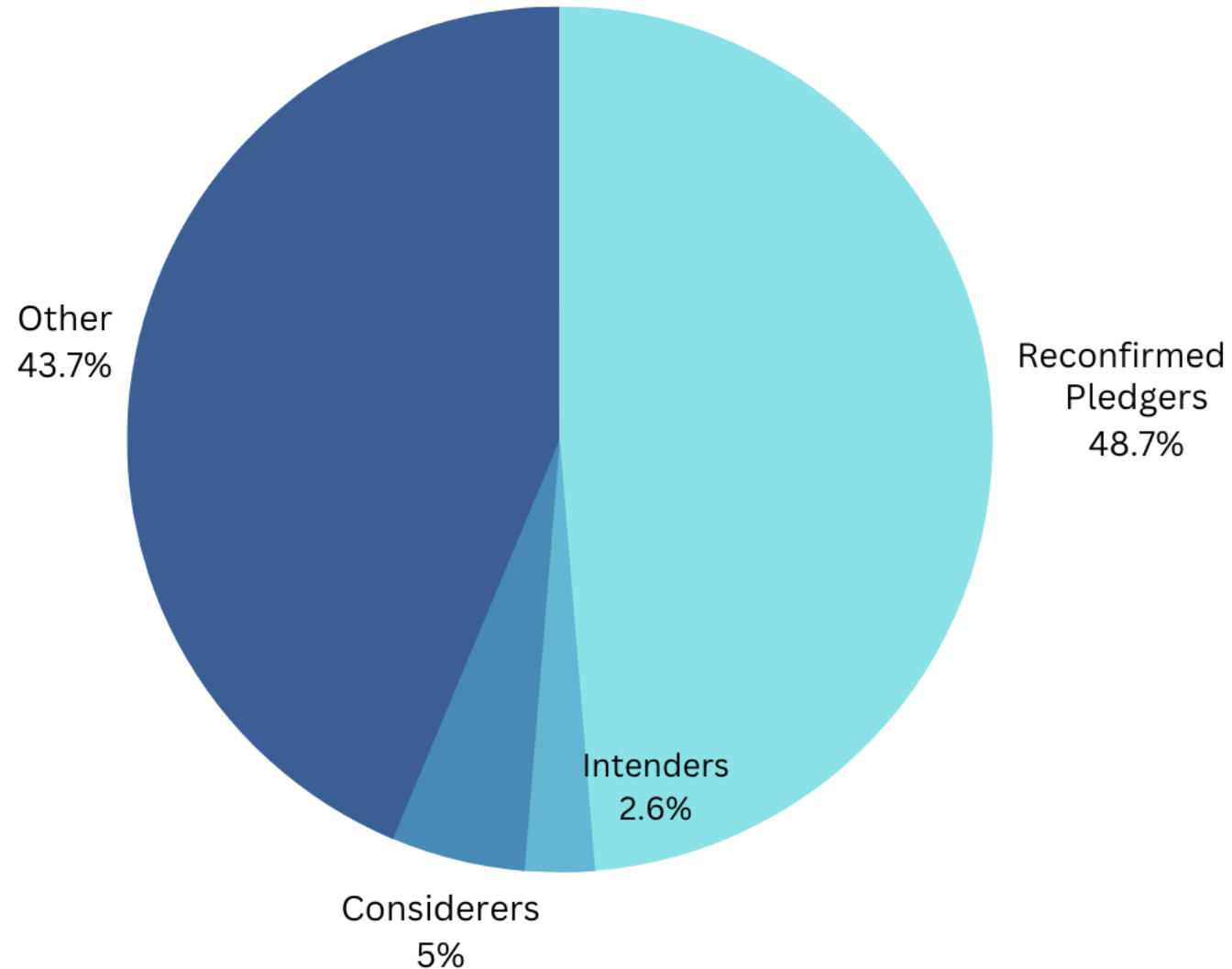
# Stewardship

- Campaign update, deep and meaningful rapport
- COVID calls and Christmas calls
- Invitation to events



# Results - Pledgers

## Conversion for Pledgers calling



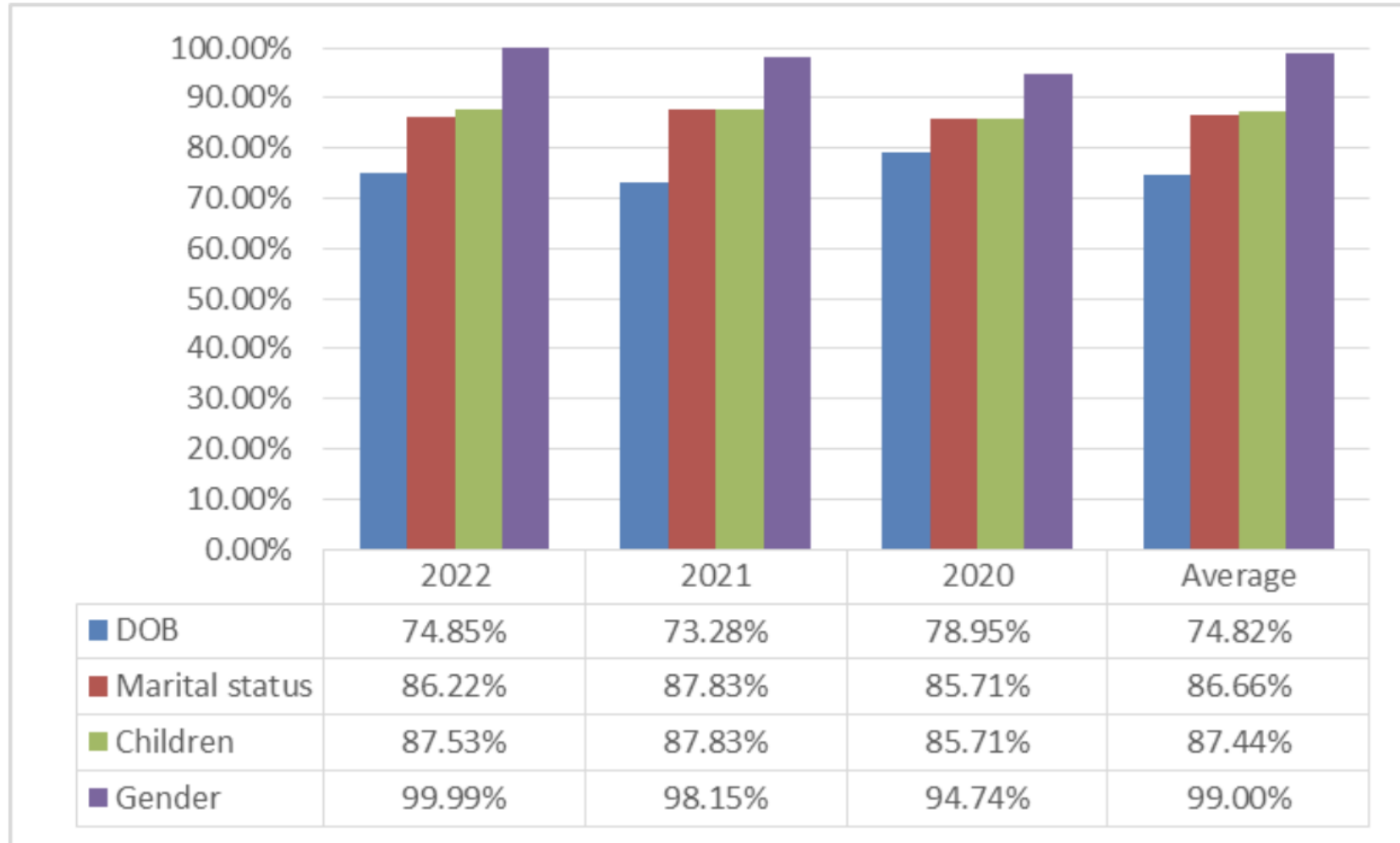
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**875** conversations

# Stewardship calling - Key takeaways

- Increases retention
- Added value for the organisation
- Comprehensive notes in CRMI
- Cleaning the pipeline
- \$13M in future income projected

# 5. Demographics



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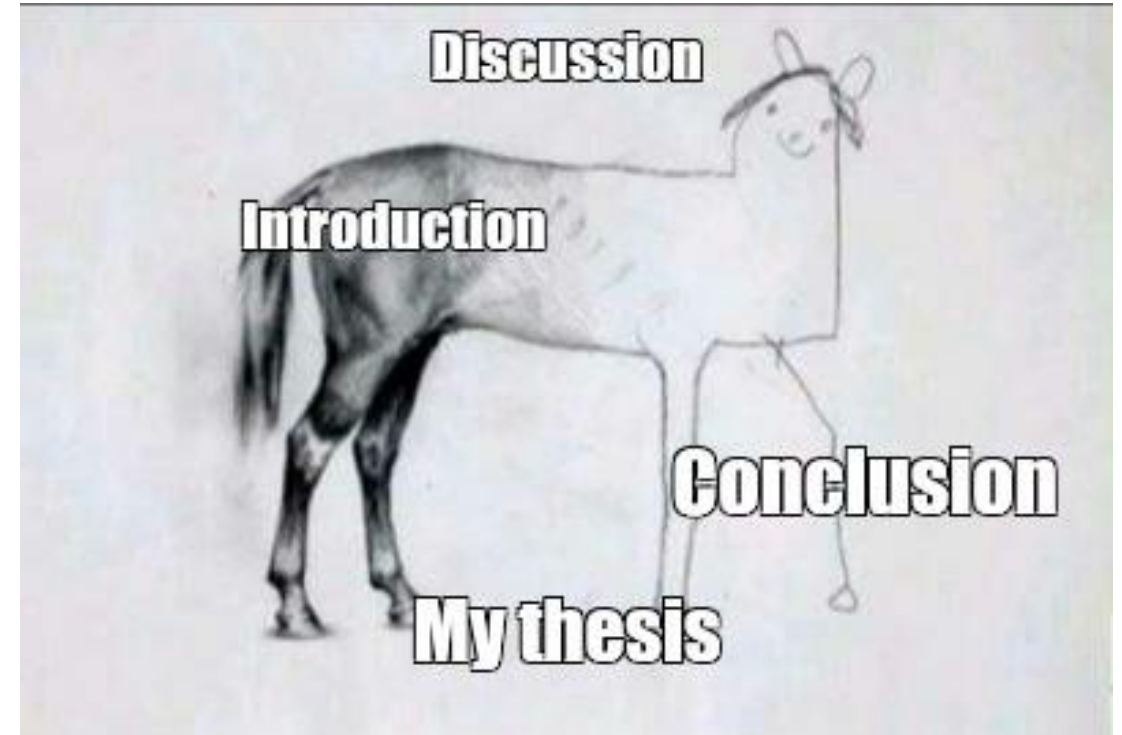
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# 6. Conclusion

A. Future income & ROI

A. Closing Summary



# Future income

*Based on Australian research by Rowen Wishart and Dr Russel James*

- 5 % of enquirers
- 11 % of considerers
- 11% of intenders
- 65% of pledgers
- \$50k AVG gift size

**Total future income projected: \$22M**

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# ROI

- **$[(\text{Future income} - \text{cost})/\text{cost}] \times 100$**
- **Costs:** roughly \$80k a year.
- **Future income: \$25M**
- **ROI: 6500%** (or 65 if you don't like percentages)

6500%!

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6500%!

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**6500%!!!!!!**

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6500%!!!!!!

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# Closing Summary

- Active status is most important for prospects
- Under 55s lists is worth calling
- Calls help identify real leads vs happy tickers
- Getting demographics information is easy & worthwhile
- Strong ROI and case for investment
- GIW vs cost of living

# Questions?



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# Thank you

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