
4 HELPFUL BEQUEST APPEALS

INSPIRED BY BEHAVIORAL
SCIENCE AND APPROVED
BY DONORS

A collaboration between
The Stelter Company and Giving Docs



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LET OUR RESEARCH GUIDE YOU



As legacy giving and marketing experts, The Stelter Company and Giving Docs care deeply that nonprofit organizations get the support they need to perform the good they do in the world. Our partners make the world a better place by feeding the hungry, defending the defenseless, providing opportunities for exceptional education and supporting faith-based initiatives. Our mission: Support our partners by researching and testing ways to reach out to and build relationships with donors.

To this end, we've made our involvement with [Dan Ariely's Center for Advanced Hindsight](#) a priority. With its inspiration and guidance, we have performed several studies on effective messaging for bequest appeals. This is an ongoing effort amid changing circumstances that responds to the evolving challenges and opportunities to meet donors where they are. This paper explores some of the messaging lessons we've gleaned thus far. We hope you will find this research helpful as you forge and steward relationships with your donors.

STUDIES

We tested nine kinds
of messaging.
Four stood above
the rest.



MESSAGING TESTED

Over the course of several studies, we tested the following messaging:

- Identifiable Victim
- Identifiable Beneficiary
- Organization Impact
- Luck
- Influencer
- Luck + Influencer
- Overhead Cost Covered
- Fear / Loss Aversion
- Creative Imagery

We also had a control message, in which the organization was mentioned in a factual, unemotional way.



MESSAGING TESTED

Here are brief descriptions of each messaging type:



Identifiable Victim

An identifiable victim is a concrete person who is named, pictured and described so it's evident they are a real person needing help or protection. When you see an ad pleading for financial assistance for a named starving child in a recognizable city slum, this is an example of an identifiable victim.



Identifiable Beneficiary

An identifiable beneficiary is similar to the identifiable victim, but instead of suffering from a hardship, they are someone deemed worthy of the donor's generosity. A scholarship recipient who worked hard to earn financial assistance is a prime example of an identifiable beneficiary.



Organization Impact

This messaging relies on general descriptions of impact such as “improve water quality,” “alleviate poverty,” “spread the good news” or “reduce hunger.”



Luck

Luck messaging asks the donor to consider the factors outside of their control that have contributed to their success.

MESSAGING TESTED



Influencer

Influencer messaging is delivered from a noteworthy leader or celebrity who is liked and respected.



Luck + Influencer

This messaging combines a call for gratitude for your good fortune delivered from a recognized leader or celebrity.



Overhead Cost Covered

In this messaging, the emphasis is placed on the fact that another donor has covered the overhead costs, meaning every dollar contributed will go directly to the cause or recipient.



Fear / Loss Aversion

People are motivated to avoid pain and loss and to alleviate fears, so we tested messaging that taps into people's desire to not leave their family in a bad situation after they die.



Creative Imagery

For this test, we used recognizable Monopoly® imagery and messaging that played on loss aversion (“Don’t squander your money on heirs that will waste it”) and the desire to leave a legacy (“What if that money could make the world a better place?”).

STUDY RESULTS

We tested two metrics in our studies:

- 1 Which messaging increases (or decreases) the likelihood of naming the organization in an estate plan.
- 2 Which messaging increases (or decreases) the amount a donor is likely to donate to an organization.



The messaging that most increased the likelihood of naming the organization in

an estate plan was **identifiable victim** followed by identifiable beneficiary. The worst performer was **impact**.



The messaging that most increased the amount a donor was willing to give was

luck + influencer. The worst performer was **impact**.

These results may surprise you. After all, you've been told to spotlight impact, right? We'll explore why the following messaging tactics succeed or fail, and how to combine other behavioral science principles with messages about impact to flip that message from ineffective to successful.

THE BEHAVIORAL SCIENCE BEHIND THE WINNING MESSAGING

The following are the
top four messaging
strategies...



WINNING STRATEGY #1

Identifiable Victim

What makes the identifiable victim so compelling? Several behavioral science elements converge to make the identifiable victim message one that motivates us to take action. Let's take a closer look at those elements on the next three pages.

FEEDING AMERICA

Zoey with her dad, Mikel

Hope for the future

Zoey dreams of one day becoming a veterinarian. Her wish for today is that everyone in her family has enough to eat.

For Zoey's father, Mikel, a proud husband and dad, there's nothing more important than family. "It's always been my kids first, my wife second and myself third," he said. "Family to me is number one."

That selfless attitude is what motivated Mikel to join the United States Army. And as part of his eight years of service, Mikel was deployed to Iraq in 2005. Because of his time in the military, he is disabled but tries to fill the gaps taking jobs as a mechanic. Without a consistent income, food can be hard to come by for the family.

"We eat rice for breakfast, lunch and dinner sometimes because there isn't much food in our house," Zoey admitted. "My mom and dad have to go with

just so that us kids can have food in our stomachs."

But the family isn't alone. They visit a food pantry—a member of the Feeding America®

Nobody in America should wonder where their next meal will come from or if their family will have enough to eat. You can help families just like Zoey's when you plan a gift to Feeding America.

2 simple ways to fight hunger in America

Do you know how much your estate is worth? No? You're not alone. This can make deciding how much to leave your loved ones and favorite organizations difficult. Instead of leaving a specific amount to family or Feeding America in your will or other estate document, consider leaving a percentage instead.

« DeAdra faces challenges in providing enough food for her 3-year-old son, Dacian, who has autism. So, she visits a local food pantry and soup kitchen.

17
Billion

Feeding America estimates the total need for charitable food this year to be an unprecedented 17 billion pounds, more than three times the food bank network's last annual distribution of 5 billion pounds.

Stelter sample:
Feeding America.
Stories and images showing real people's struggles can stir up No! emotions, but those quickly turn to Yes! emotions that move donors to action.

WINNING STRATEGY #1

Emotional Triggers

A flood of No! emotions quickly followed by powerful Yes! emotions are triggered when we see a victim and realize we can help them. We realize our own good fortune (“I’m not suffering like that victim is”) and are grateful for what we have. Suddenly the sacrifice required to make this person’s suffering go away seems less, especially compared to the flood of good feelings we get by alleviating their suffering and making a difference. We like who we are for having made the choice to help someone in need.



This is the emotional experience the donor has when encountering the identifiable victim:

- That poor person! *No! emotion: Sadness plus empathy*
- Someone should help you! *Yes! emotion: Compassion*
- *I* can be the person who helps you! *Yes! emotion: Hope plus optimism*
- That person’s suffering will be alleviated! *Yes! emotion: Relief plus purposefulness*
- I am a good person because I chose to do this good thing. *Yes! emotion: Satisfaction*

The choice to leave a legacy gift is, above all, an emotional choice.

WINNING STRATEGY #1

Concreteness

Concreteness is a term you might not be familiar with, but it’s a behavioral science term we use often at Giving Docs. The term “concrete” means something specific and individual. This concept works in direct contrast to abstract appeal, which uses more general terms and may be illustrated with statistics. Think of letting a donor know exactly where their money will be used to help the organization, down to the finest detail.

Identifiable and Relatable

This appeal also works because the person, animal or cause is identifiable and relatable. We care more about people and causes that matter to us specifically. We respond best when we can picture ourselves in the shoes of the victim.

Administrative Headquarters
432 Park Avenue South, 3rd Floor
New York, NY 10016

The
Bowery
Mission
Rebuilding Lives Since 1879

212-684-2800
www.bowery.org

Dear Friend:


For more than 30 years, my voice could be heard across New York City airwaves. Once the recession hit, I was unable to find sustainable work. I ended up spending the night on the couches of family members and friends. For many people, homelessness means living on the street. For me, being homeless meant couch surfing. I didn't have a place of my own.


After a visit with my pastor, I found myself walking through the Red Doors at The Bowery Mission. Here, I found a place where I am not judged, but loved. **It was here that I was transformed.**

The same week I graduated from The Bowery Mission's program in 2018, I also got a job in human resources (where I've worked for the last 15 months). I also trained for and ran my first half marathon. But, perhaps most importantly, I've also taken a step toward independence by living at The Bowery Mission Women's Transitional House instead of on people's couches. Soon, I hope to have a place to call my own.


The Bowery Mission not only changed my life, but deepened my faith and my relationships. It has brought joy back into my life! Without the support of the Mission, I don't think I'd be here.

Gifts from friends like you help The Bowery Mission continue providing the programs and services New Yorkers need to get back on their feet—not just today, but in the future as well. **Thank you.**


Gratefully,

Diana




MY FUTURE GOALS:



Move into my own home



Continue my work in the media



Write a book about the miracles that God has done in my life

Stelter sample:
The Bowery Mission. This cover letter is written by an identifiable victim herself, letting donors know her difficulties and her dreams.

WINNING STRATEGY #1

The Winning Combination

A emotionally charged, concrete, identifiable victim/beneficiary appeal is most effectively delivered when:

- 1 The person, animal or issue of need is visually presented and named.

We have a hard time visualizing statistics, but a well-chosen image that has been named helps us relate with the person in need. This is called the identifiable victim effect, illustrated by the adage “A single death is a tragedy. A million deaths is a statistic.”

- 2 The need is described in simple and relatable terms that trigger an emotional response.

Example: “Suzy is homeless.”



We know every person needs a home and can imagine how horrible it would be not to have one.

- 3 The solution should be presented in simple, doable terms.

Example: “By donating 1% of your estate to The Worldwide Nonprofit, you can help families like Suzy’s recover from natural disasters.”

WINNING STRATEGY #2

Identifiable Beneficiary

The beneficiary does not need to be a victim for the message to be effective. In fact, an identifiable beneficiary keeps the emotional state positive, tapping into many Yes! emotions.

Identifiable beneficiary messaging uses the same behavioral science principle of a concrete, identifiable example (specific, named and pictured) as the identifiable victim, but the focus is 100% positive. The beneficiary is presented as worthy of receiving assistance, while the benefit provided is described as life-changing or inspirational.



TEMPLE UNIVERSITY

LEAVING YOUR MARK

Fall 2020

Tina S., Fox '20

GRATEFUL STUDENT REALIZES THE IMPORTANCE OF GIVING

Tina came to Temple University as a first-generation student from neighboring Delaware County. Starting her education at Penn State in 2012, she made the decision to take time off from school to care for her mother after she was diagnosed with cancer. While working full time, she discovered her passion for helping others through human resources and transferred to Temple to finish her degree after her mother passed away in 2015.

During her time at Temple, she was able to pursue several internships, one of which offered her a job post-graduation. While she enjoyed the smaller class sizes and engaged faculty, she was still paying for college entirely by herself via a part-time job and student loans. After a car accident left her with unexpected debt, Tina was able to utilize the Broad Street Finish Line Scholarship

to pay her tuition and finish her final semester on campus on time. She'll be able to start her new career in the fall.

"I thought I was going to have to wait another semester to finish my degree because I did not have the money to pay for bills on top of tuition. That would have meant possibly pushing the start date of my new job back, or losing the opportunity altogether," Tina says. "I had delayed registering for classes because I had a tuition balance, and was overjoyed when I received the news that I had received support through Broad Street Finish Line.

"I always thought that I would never be in this situation myself, but it happened, and I am so grateful for the support I received. I will definitely be giving back after I graduate because I now realize how important it is."

Every gift to Temple is an investment in the University—in our students, our faculty and our research. You can extend your support into the future with a gift in your estate plan. Contact Tom Yates at (215) 926-2545 or tyates@temple.edu to explore your options.

Stelter sample:
Temple University.
The stirring story of a scholarship recipient who overcame loss and injury shows donors just how meaningful a gift can be.

WINNING STRATEGY #2

Variations on identifiable beneficiary messaging include:

- The pay-it-forward message, in which doing something good for another person benefits the recipient and motivates them to continue the positivity.
- The pay-it-back message, in which the donor is motivated to give out of gratitude for the good fortune or generosity of others who helped them achieve their goals.
- The “this person earned the right to be supported” model, which honors people who have studied hard, risen above challenging circumstances or otherwise worked to gain support.

Each message above is set up as a series of Yes! emotion triggers. Often the message combines the behavioral science principle of luck with the other principles mentioned here.



WINNING STRATEGY #2

The messaging formula works like this:

- 1 You (the donor) are lucky because something good was done for you and now you are successful or comfortable.
Yes! emotion: Gratitude
- 2 This identifiable person is worthy of similar luck.
Yes! emotion: Compassion
- 3 **You** can be the person who gives this person that well-deserved boost. *Yes! emotion: Purposefulness*
- 4 You are a good person because you choose to do this good thing. *Yes! emotion: Satisfaction*

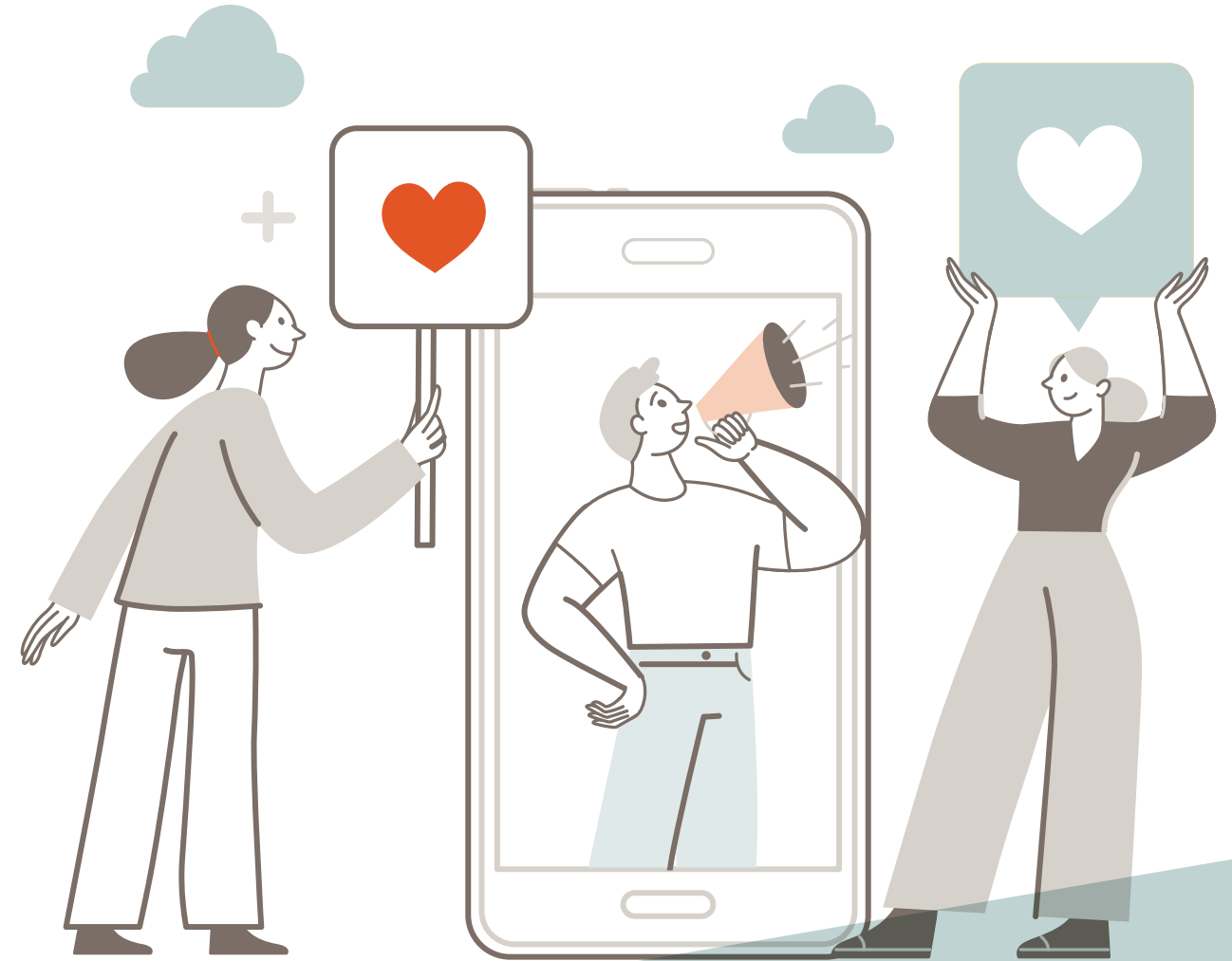


WINNING STRATEGY #3

Influencer

For all of us who have laughed at YouTube and Instagram influencers, it's time to take a serious look at how powerful influencers actually are.

Influencers have power because of a behavioral science principle referred to as social norms. We are tribal creatures; we have always needed our communities to survive. Back in the day, if you fell asleep alone by your fire, you easily could wake up facing a wild animal. We needed each other for safety and survival, and even today, we are healthier when we come together as a community.



WINNING STRATEGY #3

As social creatures, we crave approval from those we respect and trust. Without approval, we might get thrown out of the group and have to face life alone. This primal need makes us care what others think and makes us irrationally influenced by people we respect—such as influencers.

In the planned giving world, there are two kinds of influencers: the heroes particular to your cause (a well-known leader in your organization or your space) and the celebrities who have joined your cause.

As a planned giving officer, you might not recognize your potential to be one of those heroes. This is a role

that has to be cultivated through the consistent use of a planned giving officer's name, profile picture and carefully branded voice. With time, your donors will come to feel that they know you and associate you with the organization they respect and want to associate with.

If you have a celebrity that is willing to promote your cause, by all means embrace this opportunity. Ask for permission to send out appeals in this celebrity's name or to add their endorsement to your asks. Use their picture on communications (with permission, of course).

WINNING STRATEGY #4

Luck + Influencer

Deliver the behavioral science principle of luck (recognizing our good fortune and being altruistically motivated by the luck we've experienced) from the mouth of an influencer, and bingo! You've got a winning message.



TAILORING MESSAGING STRATEGIES TO YOUR ORGANIZATION

If your nonprofit isn't centered
on humans, no problem!
Here's what to do...



TAILORING MESSAGING STRATEGIES TO YOUR ORGANIZATION

Thus far, we've used cause-based charities with human victims or beneficiaries as our examples. Planned giving officers working with colleges, religious institutions or causes that are less human-centric may wonder if these same messaging strategies will work for their organization. The key is to identify the following donor concerns so you can tailor your bequest appeals to suit your audience's mindset:

- What impact on individual human beings does your organization have? Perhaps your organization is an environmental cause or helps animals.
- Non-human beneficiaries work to influence behavior in similar ways. If you are saving the trees or animals or even buildings, use this in your messaging and imagery to speak to your donors.



LOVE & LEGACY
Winter 2020

HUMANE SOCIETY
SILICON VALLEY

SUPPORTING ANIMALS AND PEOPLE

A few weeks ago, Humane Society Silicon Valley got a call from Dr. Appel, one of our generous volunteer surgeons. At her own practice, she had a dog patient, Noni, come for emergency care. Noni had been drinking excessive amounts of water and her owner, Michael, was alarmed and concerned. He had recently been experiencing homelessness and couldn't afford any treatment or diagnostics.

Dr. Appel performed an ultrasound at her own expense and discovered that Noni needed emergency surgery due to pyometra, a lethal and severe infection of the uterus. Our staff veterinarians, Dr. Moore and Dr. Shearer, told Dr. Appel to have Michael bring Noni to HSSV immediately. By 1 p.m., the surgery had begun! The team worked quickly to remove the infected organ and ensure that Noni would have all the antibiotics and supplies she would need to heal. Noni recovered beautifully and was reunited with her loving and grateful owner.

Noni and Michael's story reflects the local impact we're having in Santa Clara County. We were able to help them because we have committed ourselves to a new strategic priority called **Community Development**, an area of our work that focuses on supporting people and animals together, where the people are typically vulnerable or from an underrepresented population. To date, our work in this area has focused primarily on people and pets who are currently experiencing homelessness, like Michael and Noni.



Michael and Noni

If you want to help HSSV with this program, please contact Stephanie Ladeira at (408) 942-3005 or stephanie.ladeira@hssv.org.

Stelter sample:
Humane Society Silicon Valley. A cute image of a ball-loving dog is just the beginning. This newsletter illustrates the depth of the human-animal bond (and the importance of the organization's mission) with the story of a homeless man whose beloved pet received life-saving care at no charge.

**“GET AWAY
FROM ME!”**

Why We Avoid
Certain Messaging



“GET AWAY FROM ME!”

One of the behavioral science principles we pay close attention to is the triggering of Yes! and No! emotional states.

At a high level, our emotions drive us to:

- Keep doing something (known as a “Yes! emotional state”)
- Stop doing something (known as a “No! emotional state”)

When our emotions are not activated, we are in an unemotional, rational state.

Yes! emotions make us want to keep going. They include pleasure, laughter, anticipation and nostalgia. They are the emotions that make us long for something or make us glad or grateful.

No! emotions are painful, and they make us do whatever we can to make those feelings go away. They include disgust, fear, boredom, shame and anger.

Many of the tactics marketing experts typically tap into trigger No! emotions as a way to scare people into taking action. We have found, however, that estate planning already requires a person to acknowledge their own mortality at one level or another, and that this hurdle alone is difficult enough to overcome. If another No! emotion is also triggered, it may be too much. The result: A person wants to avoid something as important as planning their estate to care for the people and causes they care deeply about.



The following are No! emotions we strive to avoid in our messaging:

FEAR / LOSS AVERSION

Horror movies aside (which are more about triggering excitement rather than the kind of fear we're talking about), people do not like to feel afraid. In this case, we're talking about the fear of causing pain or the fear of missing out. Loss aversion is the concept of people reacting to losses more strongly than to gains. As a result, people often try to prevent losses more than they try to make gains. People are motivated by the desire to avoid losing money, for example, which is why some people will buy something that is on sale even if they do not need the product; they don't want to "lose money" by delaying the purchase and not getting the great discount. Another aspect of loss aversion is typified by the popular acronym FOMO (fear of missing out).

Because of our expertise in estate law, we initially thought people would be motivated by messaging that pointed out how important it is to have an estate plan in place. After all, nobody wants their family to have to go through probate. We thought everyone might find the thought of their family struggling with litigation or asset dispersal to be awful enough to move them to act.

While loss aversion is a powerful behavioral science principle that is often employed to motivate people to act before they miss out, we find it less effective when it comes to central messaging. What we discovered is that loss aversion messaging *discourages* rather than

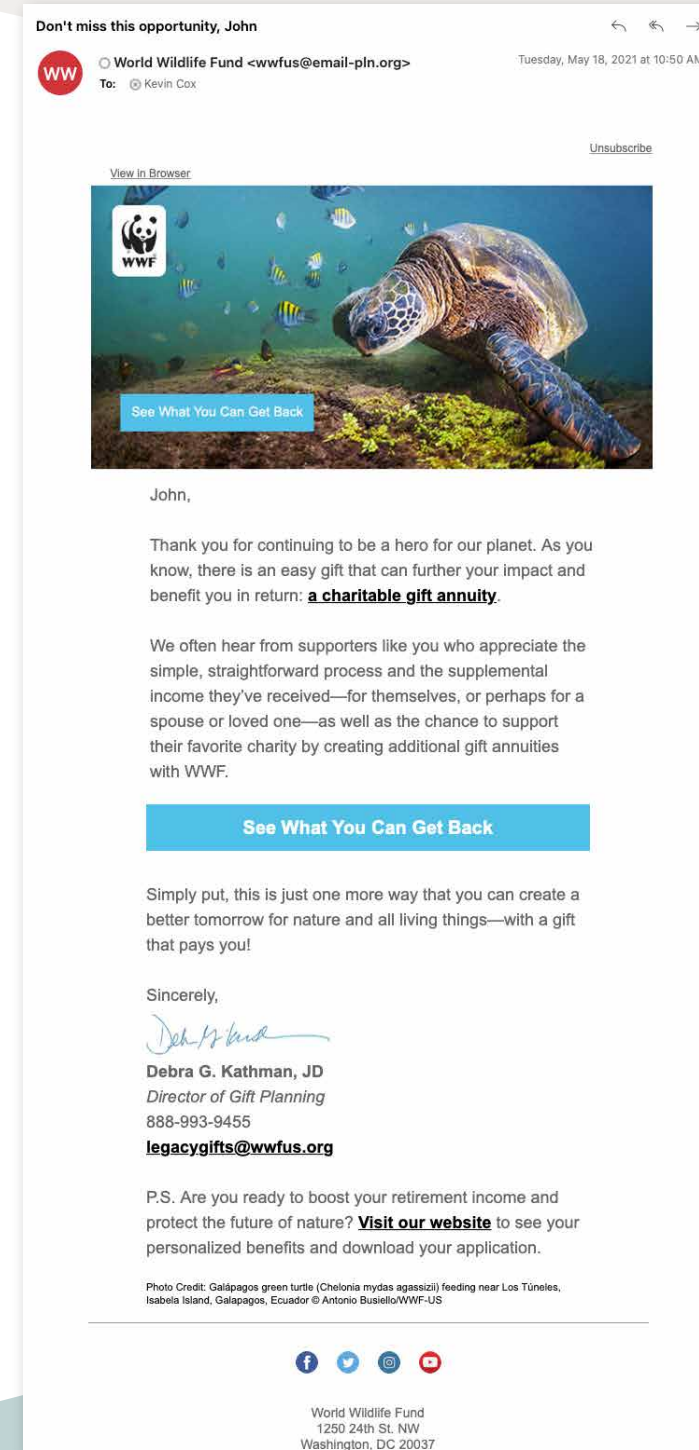
FEAR / LOSS AVERSION

motivates people to create their estate plan. Thinking about their mortality compounded by the thought of their family suffering after their passing triggered strong No! emotions. It caused people to delay taking action.

This isn't to dismiss the use of this powerful behavioral science principle altogether. We may use this principle to encourage a person to click on the email itself through a subject line that says something along the lines of:

- “Don’t miss out on this opportunity”
- “Make sure you don’t miss out on this new supporter benefit”

However, we stay away from using loss aversion as a primary message for all the reasons described above.



Stelter sample: World Wildlife Fund. The concept of FOMO (fear of missing out) has its place in certain marketing messaging. This targeted email features an urgent subject line that encourages a donor to reap the benefits of a charitable gift annuity.

DEATH

It's easy to assume that anyone who is ready to work on their estate plan is ready to think about death, but this simply isn't true. In general, research on legacy giving shows us that people are reluctant to think about death and are far more motivated by thoughts of making a difference, leaving a legacy and expressing their values through something that will transcend their lifetime.

The reason behind this resistance to think about and plan for death is most people naturally have low levels of what we refer to as [mortality salience](#). It's a measure of one's ability to conceive that they will die at some point. When we say that young adults "think they're invincible," we mean that their mortality salience is approaching zero—they have trouble

even imagining their own death. Low mortality salience is also a key indicator that a person will resist planning their estate, even if they'd likely agree it is a good idea to do so.

To get around this natural resistance to thinking about death, we craft our messaging and customer experience in a way that allows for a gentle increase in mortality salience—while not scaring people away from the process. It's a balancing act that involves a significant amount of research and testing.

While the pandemic has increased mortality salience overall, we still believe that positive messaging about leaving a thoughtful legacy to be more effective than messaging that directly speaks about death.

ANOTHER KEY

The Power of Personalization

One overarching behavioral science principle we see repeatedly come into play is the impact of personalization. Basically, people are more likely to respond to messages or services that are tailored to them. The following are personalization messages that work well to help donors feel connected to your organization and cause.



YOU CAN MAKE A DIFFERENCE

It's important that even your lower-tier donors feel that their contributions are meaningful. The biggest hurdle is likely to be getting your donor to make that first gift intention; then you just have to steward the relationship to keep and/or grow the gift. Tell them how their donation will benefit future generations, using the same principles of identifiable victim and identifiable beneficiary messaging. Share the stories of how donors have made a difference for specific people and causes in the past, and then extrapolate how their gift intention will carry forth these good intentions in the future.



WE SEE YOUR EFFORTS

When a donor contributes, it's important that someone from your organization follows up with a thank you that does not feel like it was automated or made impersonally. A handwritten card, a thoughtful personalized email or a phone call are great ways to let your donors know their efforts are noticed by people who appreciate their generosity.



YOUR LEGACY MATTERS

When someone leaves an estate gift, they are making more than a one-time donation. They are making their mark on this world. You can help this mark feel more permanent to your donor by offering concrete evidence of their future gift. In addition to thanking them, consider the following:

- Etch their name in a brick or paver.
- Add their name to a wall.
- Send them a plaque honoring their commitment.



Paul S. May and Frank Stein
Interventional Endoscopy Services

CPMC Foundation
Sutter Health

Winter 2020

Remember CPMC

‘Helping Others Feels Wonderful’

Frank Stein and Paul May met not long after World War II when they both worked at Gimbels department store in New York, and it was the start of a decades-long relationship. They worked there many years before one day putting everything they owned into a car and driving across the country to start a new life in San Francisco. Together, they built a successful hotel supply business, as well as investing in commercial real estate and shopping centers. Frank always said, “We were very fortunate. Our success in business is what allowed us to give back to the community.”

They started their philanthropic partnership with CPMC more than two decades ago. In addition to investments in CPMC cardiology, they also have two centers of care at the medical center named in their honor — one for interventional endoscopy and the other for low vision — and have made a tremendous positive impact on the health of thousands of local people during that time.

Frank said that he and Paul invested in CPMC because, “helping others felt wonderful.” For his part,

Continued on Page 4

Paul May (1927-2013) and Frank Stein (1926 -2019) have made philanthropic investments that helped CPMC treat thousands of patients with gastrointestinal cancers and polyps, heart conditions, and vision problems.

Stelter sample: CPMC Foundation Sutter Health.

Show the tangible, permanent ways your organization thanks donors. Also be sure to mention the ways that gifts can honor or pay tribute to a loved one.

YOU ARE ONE OF US

People who leave legacy gifts often do so because they identify with your organization and its cause. This identification can be quite significant for a person; they want to join your community and become part of something bigger than themselves.

Build this sense of community through intentional communications highlighting the fact that they have joined your organization. Emphasize and celebrate their induction into your legacy society and send out regular communications saying what “we” are doing to better the world. Underscore the alignment of values and joint efforts throughout the year by calling them one of your own.



REMEMBER THESE DETAILS

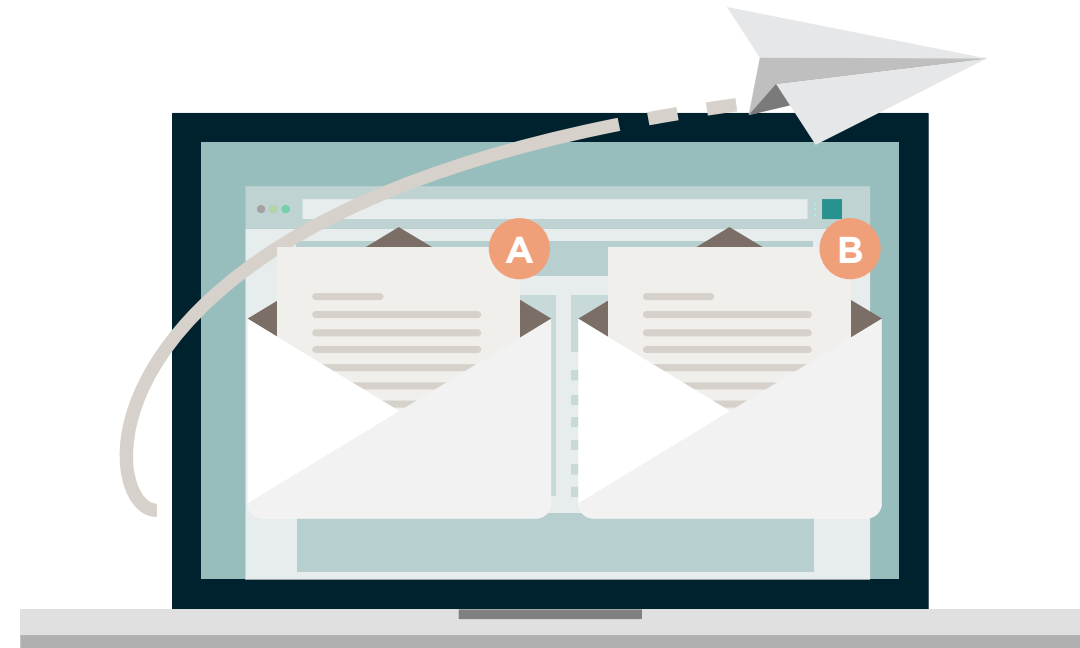
In addition to the messaging tests already mentioned, we've also explored the following aspects of successful bequest appeals.



SUBJECT LINES

Subject lines are tricky; they require the ability to communicate something enticing in a concise message. Subject lines that persuade donors to open emails often use the following behavioral science principles:

- “Don’t miss out on this new benefit...” (loss aversion, anticipation of a gift)
- “Our gift to you...” (anticipation of a freebie)
- “Did you get my email?” (piques interest or curiosity, feels personal)
- “I knew we could do it” (triggers Yes! emotions of celebrations or victory; piques interest or curiosity)



To see which subject lines your audience responds to, run A/B tests of your bequest appeals to determine which have better open rates.

IMAGE CHOICE

People are visual; images make an instantaneous impression that can cause a visceral reaction before any words are read. That's why it's important to choose images that align with your brand and evoke the types of emotions that drive your audience to take action.

To evoke Yes! emotions, it's often best to stick to images that produce positive feelings such as joy, hope, warmth, appreciation for family and optimism about making a difference in the world. Use photos that are:

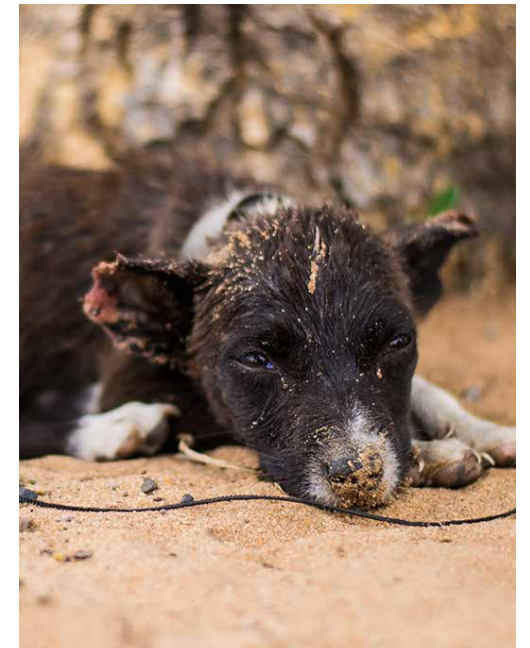
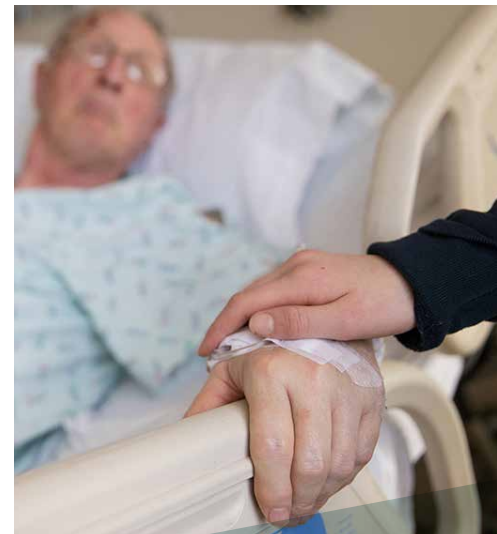
- Multigenerational, helping our donors think about leaving a legacy and impacting generations to come
- Positive, showing people laughing, smiling and enjoying life
- Diverse, showing that we celebrate the differences among us



IMAGE CHOICE

Sometimes, though, nonprofits must meet the needs of people in difficult circumstances: when they're suffering from hunger, when they're battling illness, when they've been affected by war or natural disasters. That means some of the most compelling images may show suffering. Remember the Identifiable Victim effect—an image of a sad child or a cancer patient may trigger No! emotions, but those can be quickly followed by strong Yes! emotions when donors realize they can help alleviate a victim's suffering.

Images should never be too graphic, destructive or frightening; No! emotions should not be so overwhelming that they obscure your message. But when used appropriately, difficult images can touch people's hearts and galvanize them to help your cause.



LENGTH OF EMAILS

Short and scannable is key! People increasingly read email on mobile devices, which means a lengthy, uninspiring message is a quick swipe or touch away from the trash. Even if a donor is reading your email on a laptop or desktop computer, you only have their attention for a short time. Quickly and positively make your appeal in easily readable, short paragraphs with a clear call to action. Your donor should never leave an appeal wondering what you want them to do. Keep it brief and to the point.

LINKS OR BUTTONS?

In an email, it's always good to have both a call-to-action button and hyperlinked text. That way your donor has no problem finding exactly what they need to click to get where you want them to go.



Dear John,

Thank you for downloading our complimentary guide *Your Family's Guide to Your Estate*. We hope you found the steps helpful as you prepare your legacy.

If you are working on your estate plan — whether updating it to reflect your current vision for the future or creating it for the first time — you might also appreciate our [Personal Estate Planning Kit](#). This two-part guide walks you through the estate planning process and includes a helpful workbook.

Get My Kit ›

Stelter sample: World Vision. Short paragraphs and a clear call to action make the most of the mere seconds that email readers give senders.

NOBODY LIKES MONDAYS

There's a reason Mondays provide some of the lowest click-through rates for cluster campaigns. Think about how you feel as you get settled at your desk (whether at the office or at home) on a Monday morning. You may be nursing an extra cup of coffee because you slept later than usual Saturday and Sunday, and it was harder to get out of bed than usual. You have a fresh set of tasks to complete, emails to write and calls to make. You're working hard enough as it is to get yourself back into the mindset of enjoying productive work.

If you're retired, Monday is a day like any other—only, it's not. If you have adult children or grandchildren, you may be wiped

out from an active weekend with the family. A lot of fun but tiring activities happen on weekends (or at least they did pre-COVID, and will again soon). If you spent your weekend at a farmer's market or festival, Monday is a recovery day.

Stop and ask yourself: Is this really the time of the week you are most likely to get inspired to dream about leaving a legacy? No, it is not.

Cluster campaigns that make bequest appeals are most effective when sent in a pattern like this: Tuesday morning, Thursday morning and a follow-up email on Saturday morning.

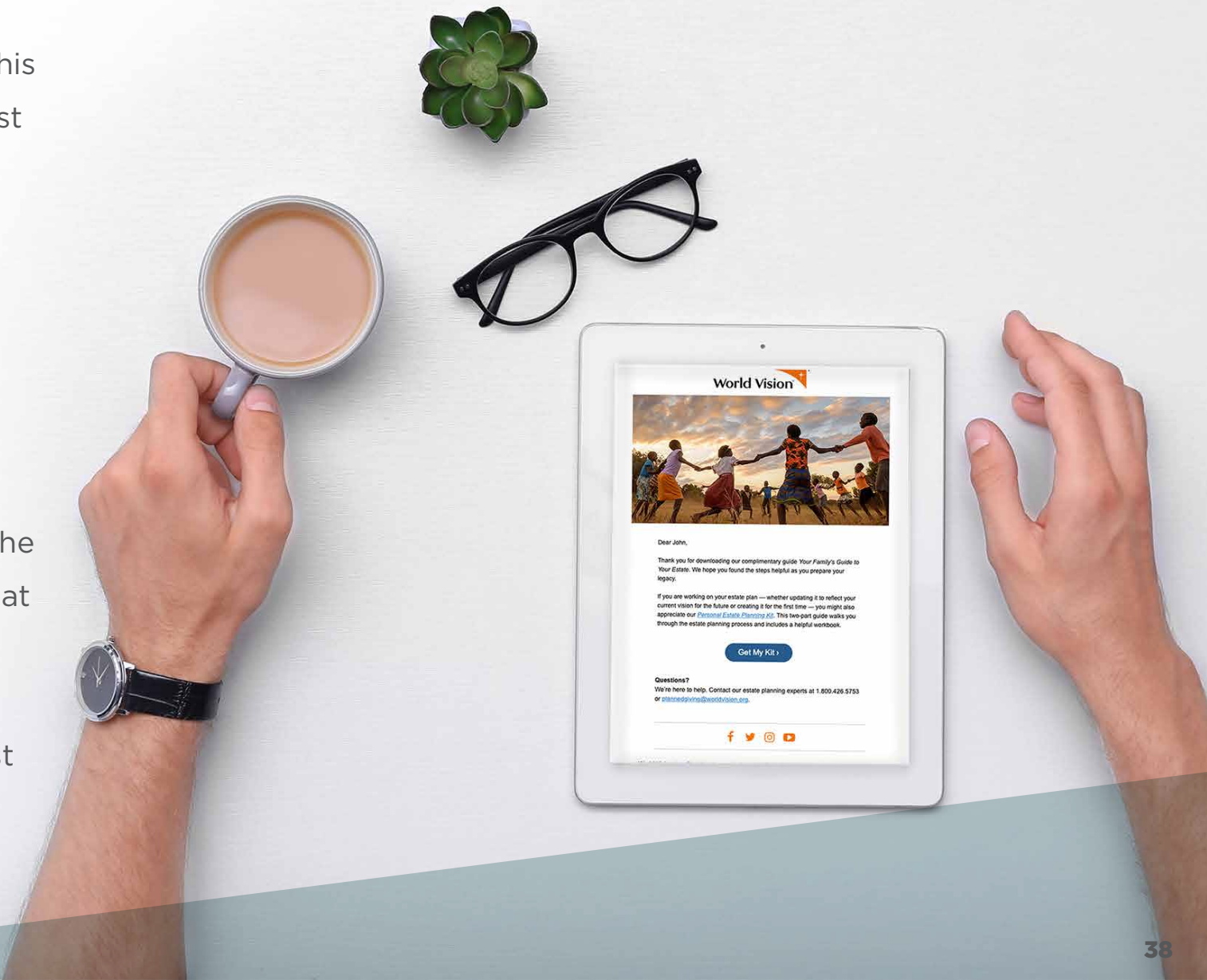
NOBODY LIKES MONDAYS

Tuesday morning puts the thought into donors' minds. This is something they have been intending to do. The bequest appeal piques their interest. It gets the ball rolling.

Thursday is a nice reminder. They didn't get around to it Tuesday, but a reminder may be enough to spur action.

Saturday is when the magic happens. It's when donors have more time to talk with their partner or adult kids. They can thoughtfully ponder the process and envision the good they will leave behind for the people and causes that matter to them.

Regardless of the pattern you choose, make sure you test and optimize your list to better target your messaging.



BEHAVIORAL SCIENCE FOR THE WIN-WIN

Our mutual goal at Giving Docs and The Stelter Company is to make legacy giving the norm, not the exception.

To this end, we test carefully crafted, scientifically based messaging, seeking the most effective and reliable methods to recommend to our partners. It is our hope that we can help nonprofit organizations gently encourage their donors to support them through planned gifts, while improving the experience so donors feel more fulfilled as they make a difference in the world.



AUTHOR PROFILES



Brantley Boyett

President and Co-Founder, Giving Docs

After practicing law for over a decade, Brantley founded Giving Docs in 2015. Under his leadership, Giving Docs has partnered with Duke University's Center for Advanced Hindsight, a behavioral science lab founded by Dan Ariely, to rethink how estate planning can work. In addition to building Giving Docs, he also teaches Law and Entrepreneurship at Duke University School of Law.



Nathan Stelter

President, The Stelter Company

Nathan leads The Stelter Company, a leading integrated marketing agency offering consulting, campaign, creative, digital and data analytic services. Founded in 1962, Stelter partners with more than 1,300 organizations, delivering marketing programs based on scientific data and a holistic view of the donor journey, informed by donor-centric research and focused on helping nonprofits maximize revenues across their development portfolios.



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