





The Jewish Federations
OF NORTH AMERICA

The *Art* of Meaningful Legacy Conversations

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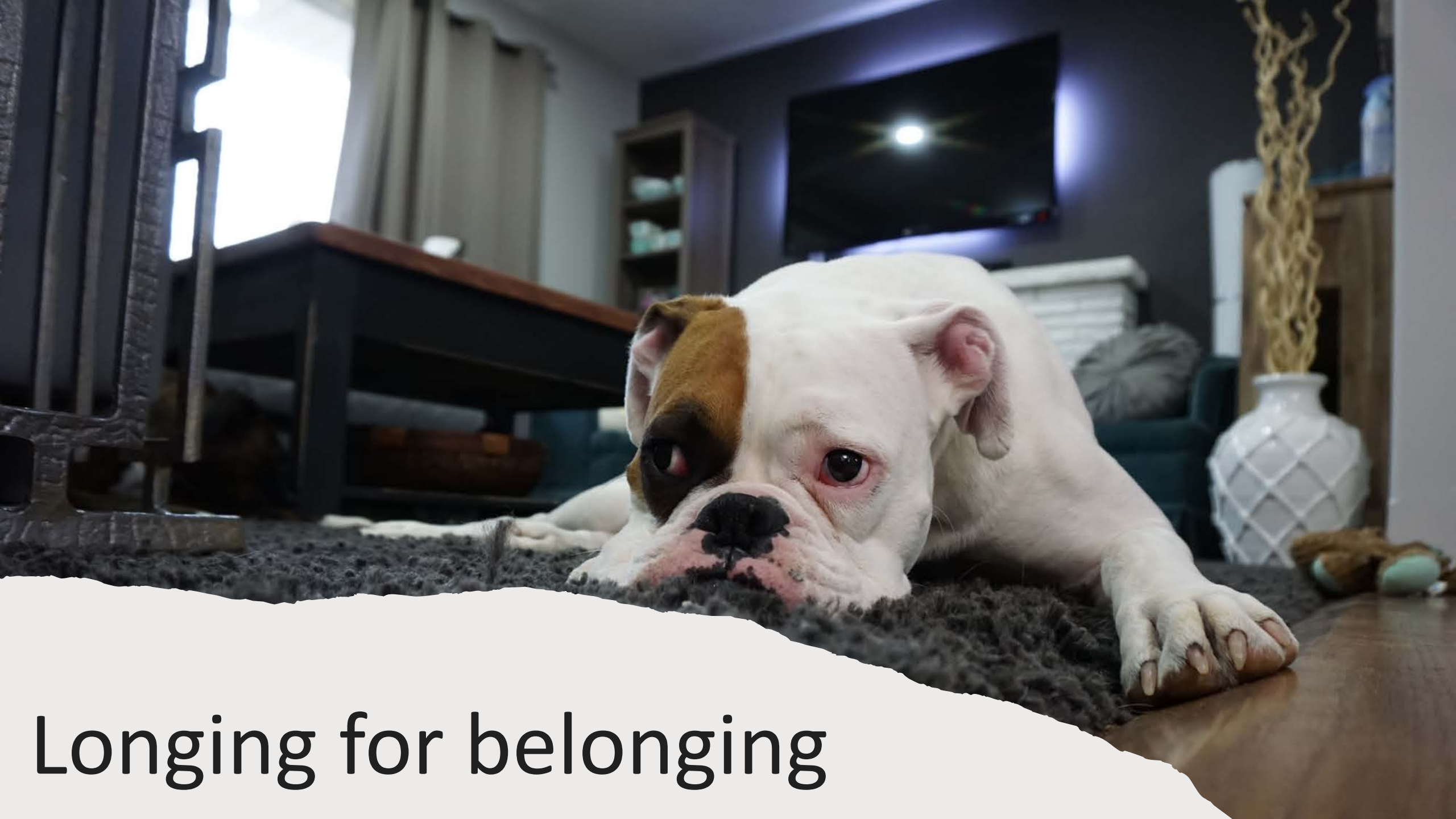
Agenda

- The Art of Meaningful Legacy Conversation
- In-person vs On-line
- Your Questions
- *Optional: Practice what you've learned*



Identity
Belonging
Purpose





Longing for belonging



Donor Life-Time Value

By providing:

- Connection
- Community
- Communication

You obtain:

- Loyal annual giving
- Some major gifts
- After-life gift / Legacy
- Future campers
- Positive word-of-mouth



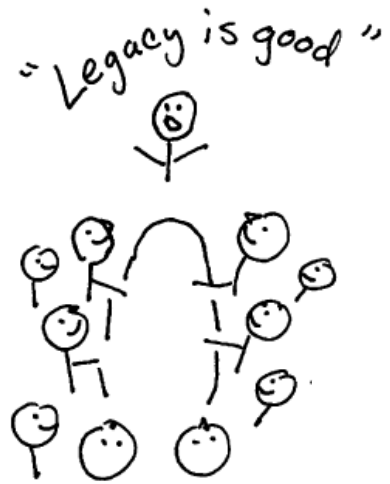
ultimate gift



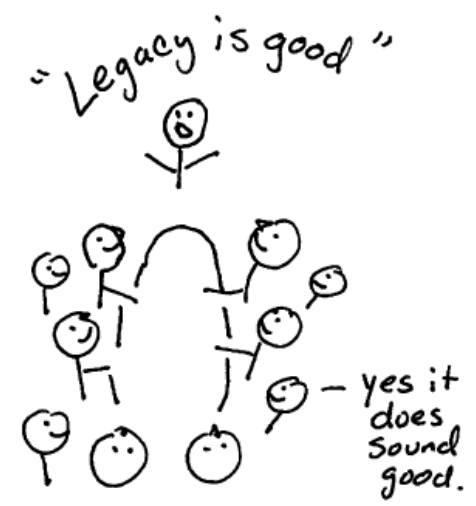
LOYALTY CARD
MILLA.CO.UK

UP TO 70% OFF

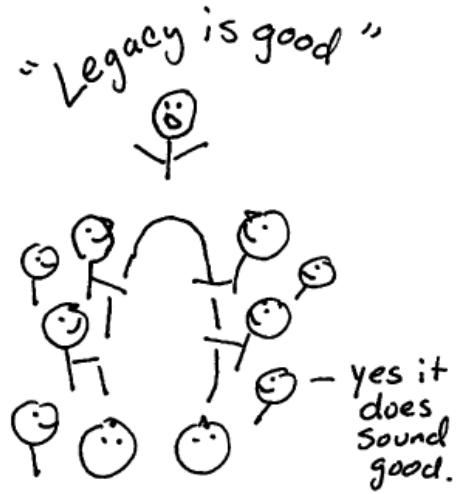
The Art of the Legacy Conversation



The Art of the Legacy Conversation

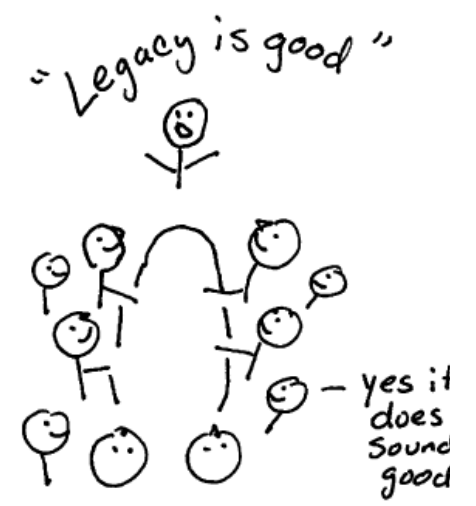


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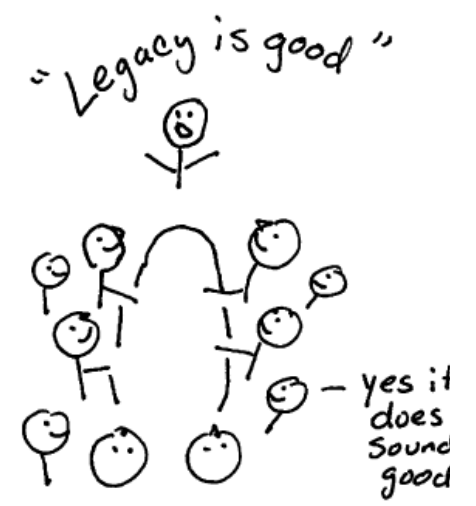


**Raise
Awareness**

The Art of the Legacy Conversation



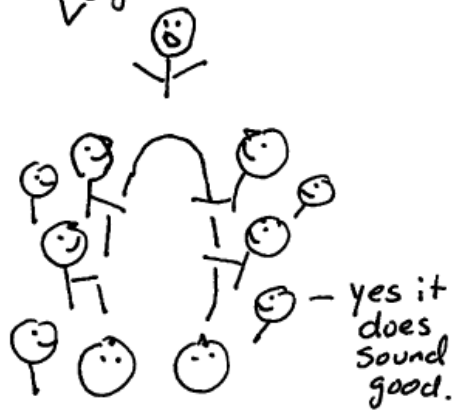
The Art of the Legacy Conversation



over coffee?
go for a walk?

The Art of the Legacy Conversation

"Legacy is good"



Tell me your story...



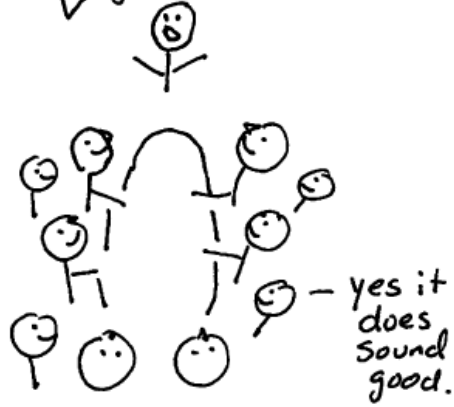
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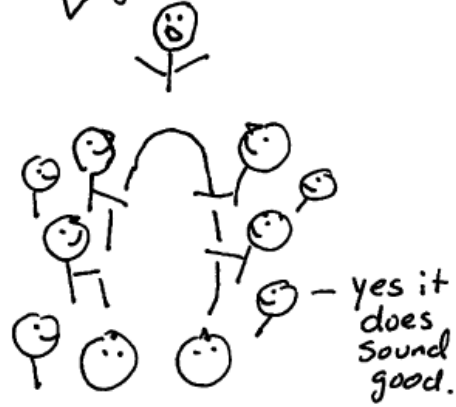
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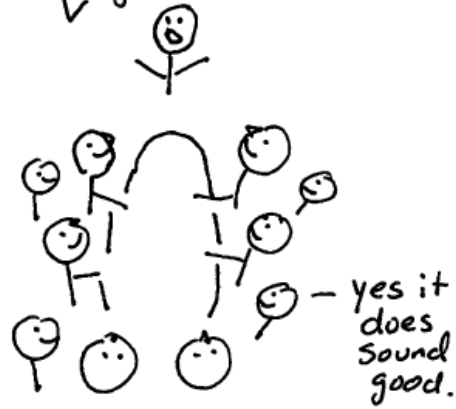
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Tell me your story...



Well...



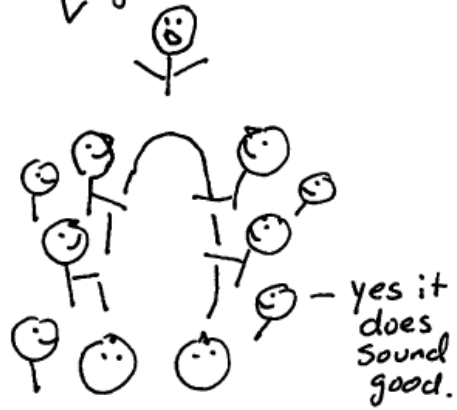
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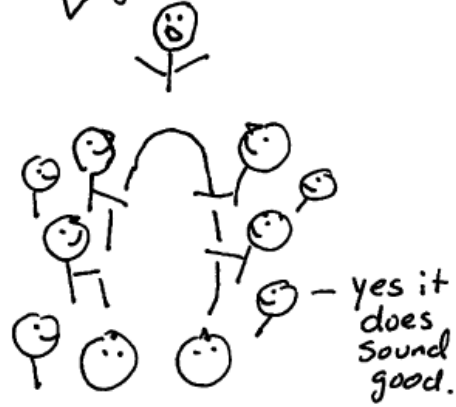
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- yes it does sound good.

would you like to talk?



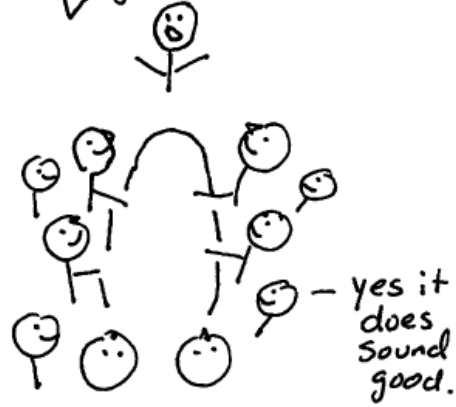
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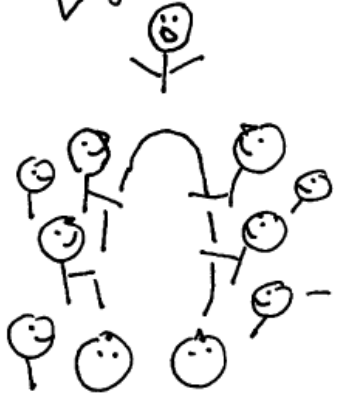
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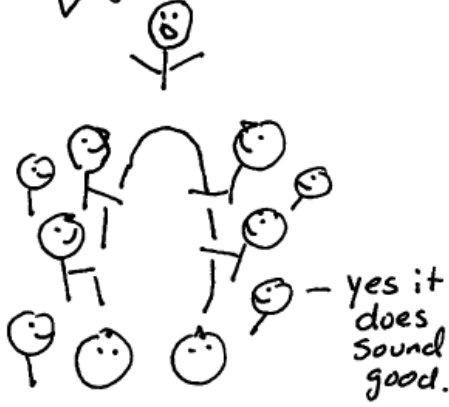


Well...



The Art of the Legacy Conversation

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would you like to talk?



over coffee?
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Tell me your story...



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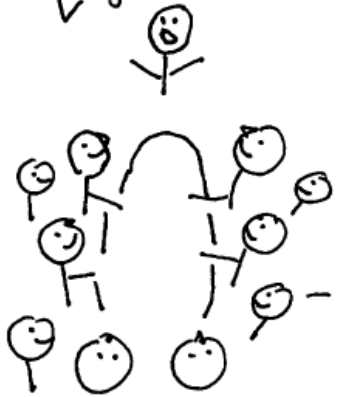
Have you thought about...



Legacy?

The Art of the Legacy Conversation

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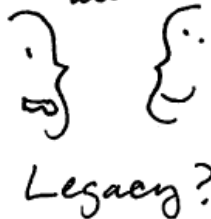
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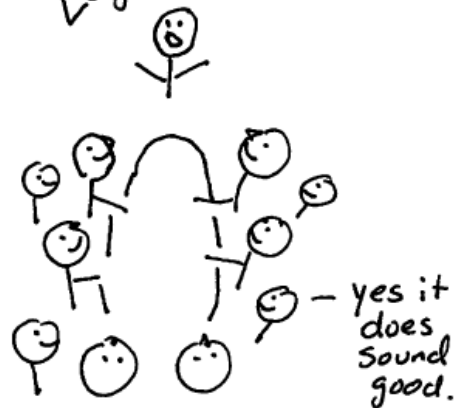
Here is what I'm doing and why.
you might want to join too.



Invitation
without a
conversation



"Legacy is good"



would you like to
talk?



over coffee?
go for a walk?

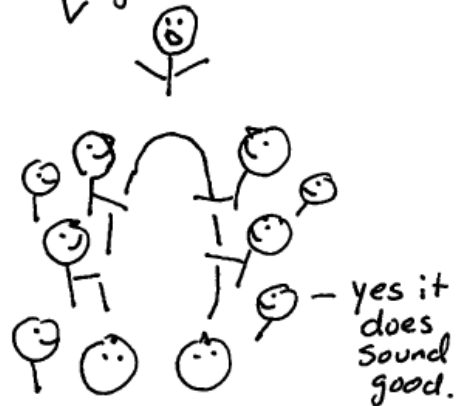
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Legacy?

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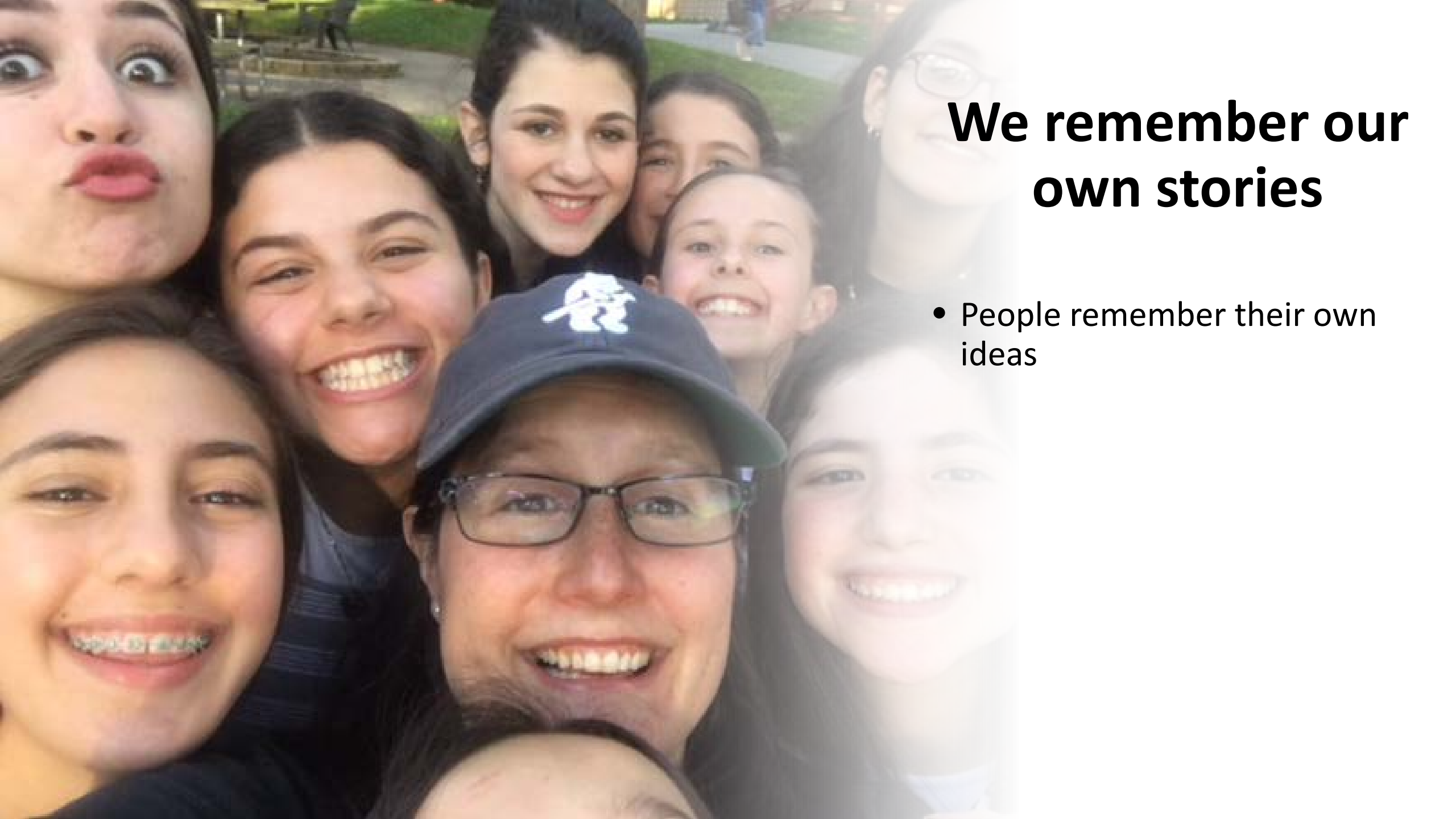
Legacy?

Empty

Here is what I'm doing and why.
you might want to join too.



**We remember our
own stories**



We remember our own stories

- People remember their own ideas



We remember our own stories

- People remember their own ideas more than what they hear said to them



We remember our own stories

- People remember their own ideas more than what they hear said to them
- People act on those things



We remember our own stories

- People remember their own ideas more than what they hear said to them
- People act on those things that are meaningful and important to them



We remember our own stories

- People remember their own ideas more than what they hear said to them
- People act on those things that are meaningful and important to them
- People who feel listened to



We remember our own stories

- People remember their own ideas more than what they hear said to them
- People act on those things that are meaningful and important to them
- People who feel listened to feel they will be remembered



We remember our own stories

- People remember their own ideas more than what they hear said to them
- People act on those things that are meaningful and important to them
- People who feel listened to feel they will be remembered
- People recall how you made them feel



We remember our own stories

- People remember their own ideas more than what they hear said to them
- People act on those things that are meaningful and important to them
- People who feel listened to feel they will be remembered
- People recall how you made them feel

Serving the needs of others

1

Listen

2

Learn

3

Lead

with follow-
through

The Art of the Legacy Conversation



What?

So What?

Now
What?

What Questions *are easy to answer:*

"What are you doing these days?"

"What are the kids up to?"

"What is your connection to camp – tell me your story?"

What?



So
What?

Now
What?

The Art of the Legacy Conversation

“What?”



So What questions *ask people to think and reflect and find meaning.*

"**So What** do you think you learned from Camp?"

"**So what** difference does a Camp experience make?"

"**Why** do you think it is so important?"

What?

So
What?

Now
What?

The Art of the Legacy Conversation



"So What?"

The Art of the Legacy Conversation

“So What?”



The Art of the Legacy Conversation

“So What?”



The Art of the Legacy Conversation

“So What?”



The Art of the Legacy Conversation

“So What?”



C



MPASSION

Focus on the Storyteller

1

Listen to what they are saying.

2

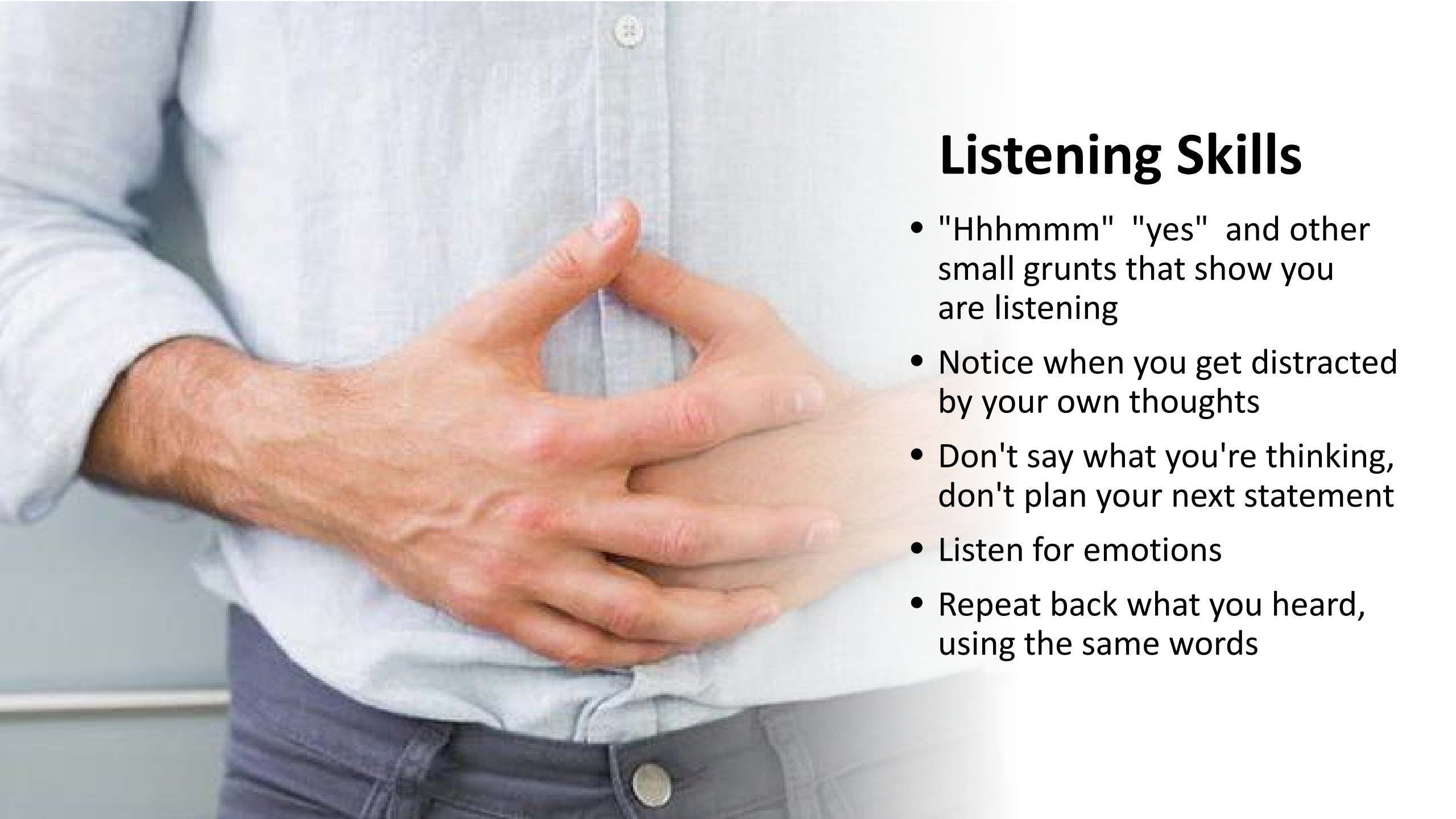
Seek to understand.

3

Take **cues from them** to move the conversation forward.


4

Look for ways to **acknowledge, affirm and agree.**



Listening Skills

- "Hhhmmm" "yes" and other small grunts that show you are listening
- Notice when you get distracted by your own thoughts
- Don't say what you're thinking, don't plan your next statement
- Listen for emotions
- Repeat back what you heard, using the same words



Lost in thoughts?
Tummy Time!

Listening Skills

- "Hhhmmm" "yes" and other small grunts that show you are listening
- Notice when you get distracting by your own thoughts
- Don't say what you're thinking, don't plan your next statement
- Listen for emotions
- Repeat back what you heard, using the same words

Wait until time is right

Whatever you hear –
accept it.

Work with the
information
provided. Negative is
ok too.

Only ask about a
legacy commitment
when the donor
seems **ready**.

Now What questions *lead to action and closure.*

"Now what would you like to do?"

"Would you be interested in this?"

"Can we talk again?"



What?

So
What?

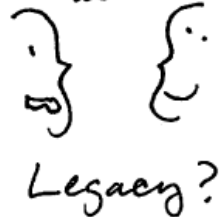
Now
What?

The Art of the Legacy Conversation



“Now What?”

Have you thought
about...



Here is what I'm doing and why.
you might want to join too.

Things you might say

- "Listening to you, it makes me think that you might be interested in the Legacy Society"
- "Let me tell you about what I'm doing"
- "Would you consider joining?"



Things you might say

- "You have time to make a plan for what would be best for you"
- "Most people leave a percentage in their Will"
- "You should ask your personal financial advisor"
- "Good Questions. I don't know. Let me get back to you."
- "When should I be back in touch?"

Now What
can I do to
help you?

“How long do you think you’ll need to think about this?”

“When might be best for me to follow-up with you?”

“Are there any other questions you would like me to follow-up on?”

“Do you prefer that I call, email, or text?”

“Is there anything else I can do to help you?”



Arc of the legacy conversation

What? (20%)

So What? (60%)

Now What? (20%)



Thank You!

Every Legacy Conversation ends with a personal, handwritten thank you letter that THANKS them for the meaningful conversation you had together.



Follow Through
= Trustworthy



Opportunity
to honor and
thank you in
your lifetime



Benefits of Membership



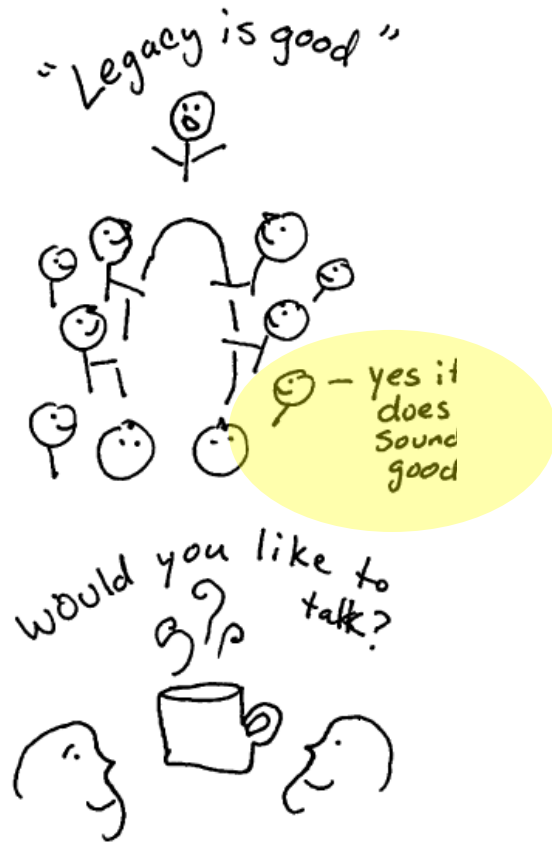


In-person

on-line



The Art of the Legacy Conversation



Raise Awareness First

- Group presentation
- Exclusive events
- Marketing materials
- Donor Briefings
- Peer-to-peer
- FOMO



"What conversation are we having?"

1. Raise Awareness
2. Personal outreach with request to meet
3. **Confirm the time and permission to have a meaningful conversation**
4. Personal thank you
5. Follow-up and follow-through

Who is most motivated to join?

- Loves your organization
- No children or close relatives
- Widow/widower having outlived a spouse
- Single women over 65
- Grown children doing ok
- Volunteers
- Many year connection to camp / Multi-generations
- Loyal annual donors (even small amounts)

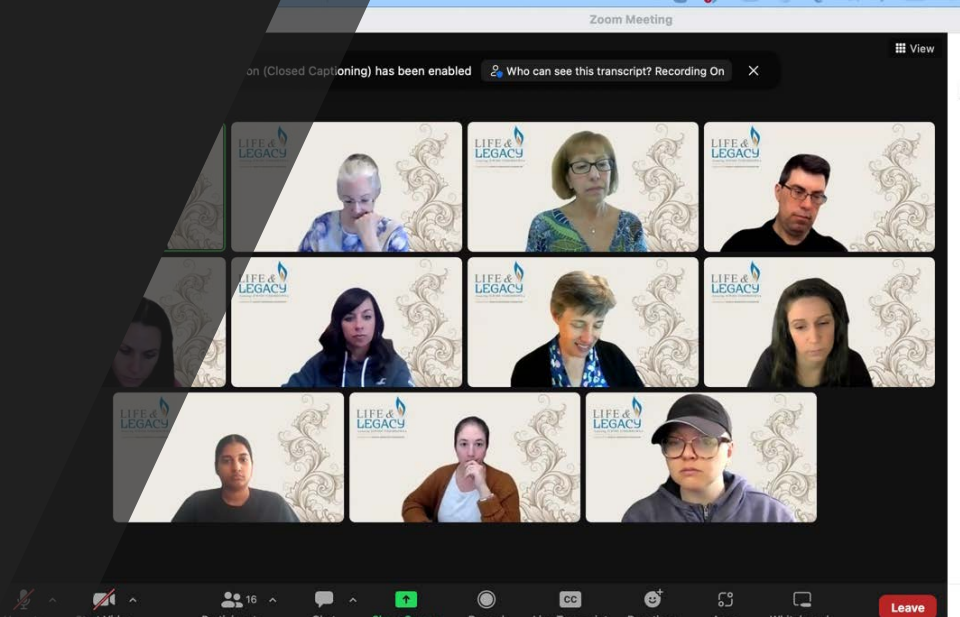




Phone, email, text message?

Meaningful conversations ON ZOOM

- Position yourself correctly
- Look into the camera
- Turn off your distractions
- Lift-up your laptop
- Show expression, nod head, eyebrows
- Express interest verbally, "hmmm, I want to hear more" "What then?"
- Reflect back what you heard
- Ask for permission for a deeper conversation



Three
Questions
to Ask

What?

So
What?

Now
What?

What do you think your legacy will be?

- Reflecting on your past
- Who will follow in your footsteps?
- How will you be remembered?



Listen to the stories

- Listen for motivation to stay connected
- Reflect back their Identity
- Offer benefits of Legacy membership as one way to stay engaged and connected





People remember
what they said

People remember
how you made them
feel

People act on the
things that are
meaningful and
important to them

It isn't about you

Meaningful legacy conversations stick

- 1. Ask to have a conversation**
- 2. Ask “What? So What? Now What?”**
- 3. Send a hand-written thank you note**
- 4. Follow-up**



You need only
plant the seed
of an idea



Questions?



*Break Out
Rooms*

*What?
So What?
Now What?*